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Pitch Principles

For clients & agencies

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ISBA

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1. Openness & transparency

Ask yourself is there a need to pitch in the first place. Clarifying the business opportunity is key from the outset.

In most pitches there is an unnecessary amount of secrecy. Do you need to keep the name and numbers of agencies, budgets and timeframes a secret?

There needs to be transparency all the way through the process, to allow agencies to make informed decisions on whether to pitch and to assure clients full participation and a more straightforward pitch journey.

For fairness and consistency all agencies should be briefed on the pitch at the same time and place.

2. Respect

Treat pitching with the respect it deserves. It requires senior involvement/authority from both sides from day one. Don't just bring the decision makers in at the end of the process. Only with senior client involvement from day one can the agencies be judged fairly. Consider paying a fee to an agency as a sign of good intent.

Design and instigate a process that gets your housekeeping in order before the pitch.

Agencies need to be discerning about what they pitch for. Be clear about what opportunities are right for the agency business.

3. Bravery

On the part of both clients and agencies. Push back on bad briefs or too much/too little time and always challenge bad practice.

Eliminate agencies, including the incumbent, along the way if they really don't have a chance. You will end up saving them a lot of heartache and money.

Explore the fact there may be alternative ways of pitching that could be more efficient and effective for the task in hand.

4. Access & navigation

Have the process clearly mapped out from the outset in terms of numbers, timings, people involvement and location. Who is the decision-maker, and what will the decision be based on?

Treat all pitching agencies as if they were the incumbent. Allow them to navigate their way through your business in the same way.

5. Timing

Pitches can often go on too long. Set a timescale and stick to it.

A creative pitch in four weeks may not always be possible but could be worth aiming for. Contemporary practice indicates that pitches are elongating mainly due to lengthy negotiations which should be contained within the pitch time frame.

6. Power of collective action

Encourage both parties to sign up to the IPA/ISBA mutual pre-pitch NDA and be cautious of clients and agencies who are not willing to respect these principles.

At the very least remember the five P's of pitching:

- **Process**
- **Preparation**
- **Professionalism**
- **Partnership**
- **Payment**

Contact Details

For the full Pitch Principles please visit:
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