

The Twelve Step Programme to running Remote Pitches

If the world in lockdown has shown us one thing, it is that it does not stop and some things are easier when working remotely, than when working within an office. The commute for a start. Meetings tend to start and finish on time, and lengthy emails can be replaced by shorter video calls, to great effect. However, just because some things are easier, they are not necessarily better and certain things need to be re-imagined to get the most out of operating remotely – Pitches are a prime candidate.

Pitches run online can feel like they are a lot easier – no agency visits, meetings are easier to run to time, unnecessary ‘pitch theatre’ is removed so that the agency, and you, have to concentrate on the potency of the idea. In reality, there are several ways that the apparent ease with which the process runs, can trip you up and leave you with a less than ideal selection. Here are 12 steps to follow to help you get the best from running a pitch remotely.

1) Are you really ready for this?

Pitches require precision in planning and delivery if they are to remain under control and run smoothly. Quite often, there can be a better, more efficient way to address your challenge than going through a pitch process. Therefore, before you start, be sure you really understand the time and commitment you will need to invest so that you have enough resource available. But, whatever you do, be sure that you have assessed that a pitch is the best option open to you.

2) Pitch Up Prepared

Preparation is everything for the smooth running of a pitch. In the remote environment, having the briefs written and agreed in advance is essential, as is being absolutely clear who needs to be involved in the decision and that they will be available throughout the process. You will also need to know how you are going to make each decision, based on which set of criteria, as this will streamline your process and keep you running to time. It often helps to have some form of scoring system, pre-prepared, so that your team can gather their thoughts and observations, in a form that can be compared and discussed effectively over a video call, or two.

3) Select Carefully

Selecting the agencies you wish to invite to your pitch requires knowledge of the sector and an understanding of the culture and characters of each agency. If you, or your colleagues, have worked with agencies previously, and they have the skills you require, they are always a good place to start, as long as the experience was positive. Moreover, there are several specialist consultants you can contact and a small number of agency finder websites that will allow you to match agencies to your needs. Working in a regulated environment may require your agency to have specialist knowledge – but that

is not always a pre-requisite, if your own compliance team is actively involved and on-hand to guide them.

4) Have a go/no go test

There will be no shortage of agencies that will be willing to pitch for your business and seem hungry to work for you. However, meeting each one is not a very efficient way to determine who is best placed to support you. There are usually qualities, skills or experience you need your agency to have, that will allow you to eliminate agencies before you need to meet them or invite them to respond to your RFI (request for information). Do they have experience of working in a regulated market? Do they specialise in a specific area like banking, investments or insurance, for example? Can you see evidence of this on their website, or through online directories?

5) Be precise (and concise)

The questions you ask your candidate agencies, to qualify them should concentrate on the information you need in order to make your decision. This may include information that your business needs as part of its corporate governance, but the skill here is to keep your RFI and any document the agencies prepare for you, as concise as possible. You are going to be the one who reads through each one and tries to compare like with like – when they will all essentially be claiming they are completely set up for all your requirements and operational benchmarks.

6) Chemistry is Critical

The most difficult aspect of running an online pitch is finding a way of building a connection with the members of the team that will be working on your business. When working face to face, the process would normally include chemistry meetings or workshops so that you can get a sense for what it is like to work with each other. Remotely, this is more challenging as meetings are more structured, interaction more sequential and the normal energy that can build in a meeting room where everyone is contributing, is lost. However, video platforms do provide a unique introduction to each person's life, not accessible in conventional meetings. Perhaps ask each person to select an item or artifact from the room they are in which best describes them as a person. This will offer some light relief and provide insight into the character of each person on the call.

7) Pitch In

Passivity is your enemy. Do not be passive in the pitch process. The more you get involved, by supporting and interacting with each agency, the more you will see the value they could add to your team. Set the meeting times and stick to them. Being remote, rather than meeting up in person, can make it feel that it is easier to change meetings around or not attend at all and have the agency send a 'film of their presentation'. If you suggest this, don't be surprised if the agency chooses not to pitch and you are left with a less than optimal choice. Respect that each agency does a lot of work to impress you and you should be there to see – and react – to their proposal.

8) Level the Pitch

Throughout the process, the agencies will have questions. It is commonly thought that the response to every question, raised by each agency, should be shared with all other agencies involved within the pitch. This is not always the case. Sometimes, agencies develop a line of thinking, through their questioning, that will set them up for a very different or radical approach to your brief. The challenge is that you will need to be the judge of what is shared and what is not. Always remain aware, the more you share the better the responses will be.

9) Pitch Platform

Running a remote pitch requires you to work on an online platform. There are too many to choose from now, it would be hard to recommend any given one. However, each agency will have their favourites, which will play to how they present their work or interact with each other and your team. It is a good idea to let them choose the platform for their meetings, if you are not restricted by your own technology policy to be on one specific platform.

10) Pitch Fees

Pitching is a very competitive and costly business for agencies. In some cases, it has become seen as the 'lifeblood' of the agency, bringing much sought-after growth as well as energy and enthusiasm, shared by all, in the agency's future success. You will see each agency give their all to win. So sometimes, especially if the brief is complex, it is appropriate for the client to support the pitch by paying a modest fee to those agencies that are participating. Consider whether this would show how serious you are about this process and finding the right partner.

11) Making a Call

The purpose of a pitch is to assess the quality, affordability, service levels and rapport you have with each of your agencies. Each element is important when judging whether they will be able to provide you with what your brand needs, in a sustainable relationship. If you have not built a scoring mechanism into your process, you will be relying on your impression gained from each meeting, but will be influenced most by one or two stand-out moments, usually from the last meeting you had. Whilst this may produce a good outcome for you, it will not give you the reassurance that a well organised, moderated and measured process will provide, and it may not stand up to the scrutiny of time.

12) Pitch Perfect

With the right level of planning, involvement and consideration you should be able to create a robust pitch process to work through. Ensure clarity as to what each agency needs to do, to successfully complete the tasks asked of them. It is important to make sure your pitch is well thought out in terms of timing. Give yourself enough time to fully assess all agencies, but conversely, do not allow it to go on too long. For example, a creative pitch in four weeks, may not give the agency enough time to properly prepare.

However, twelve weeks may be too long, and you may see agencies lose the energy and enthusiasm vital for powerful performances over the full duration of the pitch.

We hope these steps, built on 20 years of agency pitch management and 12 weeks of remote pitching experience, help you to navigate your way through a pitch that is wholly or partly run online. There are aspects of the pitch we have not addressed here, like assessing fee proposals – but the basics are covered and we would be happy to guide you on any part of your process or are equally well placed to run the pitch for you, if that's more appealing.

If you would like any further support or advice, please visit www.haystackonline.com or we can support your pitch with our proprietary P.I.T.C.H pack, which provides you with the finer details on how to run a pitch and all the documents you will need to support it. Just contact us at pitches@thehaystackgroup.com.

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