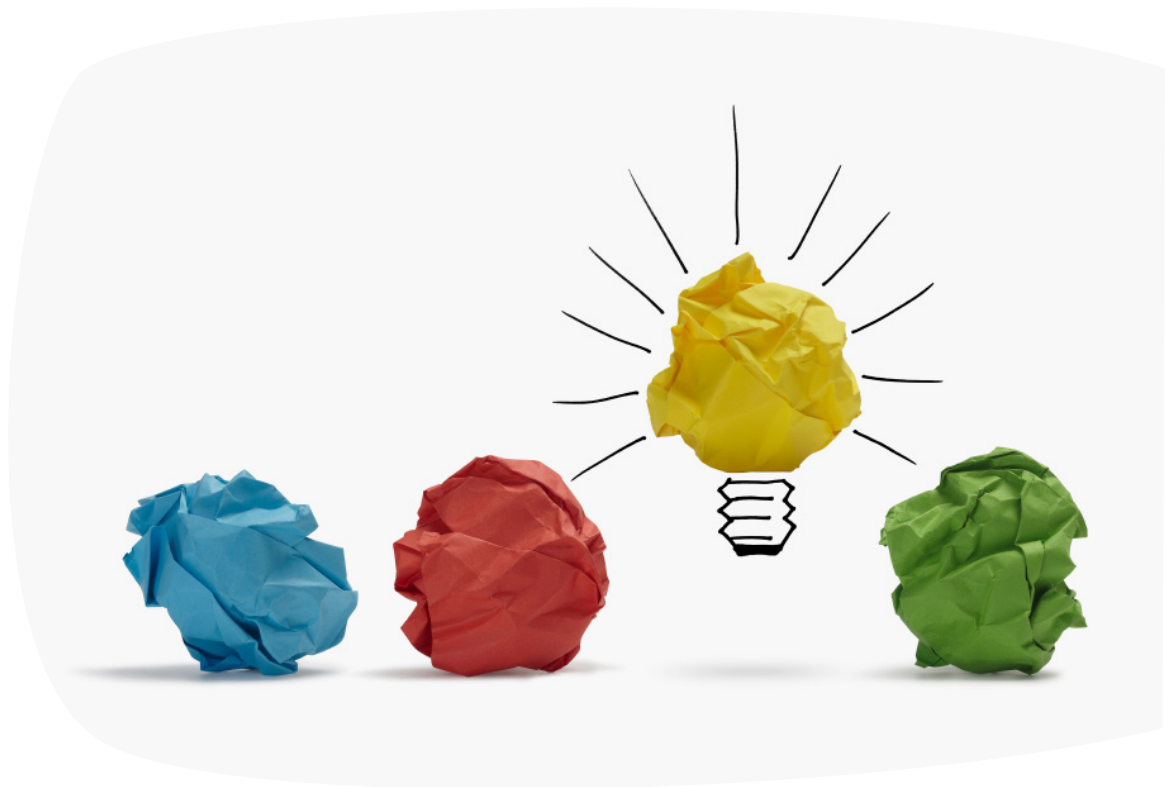




How to guide
Win more pitches



Published by
The Agencies Council
Second edition, July 2013



Contents

Contents.....	1
Acknowledgements.....	2
Introduction.....	3
How to get on a pitch list.....	4
Pitching as the incumbent.....	5
Pitching if not the incumbent.....	6
Completing a request for information (RFI).....	7
Successful chemistry meetings.....	8
Better pitch preparation.....	9
Pitch protection.....	11
1. Non disclosure agreement.....	11
2. Copyright and intellectual property protection.....	11
3. DMA Pitch protection scheme.....	12
The presentation.....	13
Managing procurement and e-auctions.....	14
Managing Procurement.....	14
E-Auctions.....	14
The appointment.....	15
And finally... How best to avoid a client review.....	16
Further references.....	17
About the DMA.....	18
Copyright and disclaimer.....	19



Acknowledgements

The DMA wishes to thank the DMA Agencies Council for their contribution to these guidelines and in particular the following for the revision of this edition:

Tim Dearing, CEO – ClientAudits/Marketing-Merge
Tony Spong, Business Director – AAR
Ben Stephens, Managing Partner – VCCPme

All rights reserved
© The Direct Marketing Association (UK) Limited

No part of this publication may be reproduced without the written permission of The Direct Marketing Association (UK) Limited



Introduction

In today's highly competitive marketplace, where good pitching is rarely 'good enough to win', agencies need to raise their pitch game.

Key to this goal is the adoption of a consistent and effective agency pitch process. When fine tuned, this process should ensure greater success, with less agency time and expense wasted.

The overall quality of pitch processes within direct marketing is relatively high. But it is still variable and there are many opportunities to raise standards for the mutual benefit of agencies and clients.

This updated 2013 Win more pitches guide has been fully revised following the Pitch Process Insight Survey conducted for the DMA by ClientAudits. A parallel [How to find the right direct marketing agency](#) guide has also been published, specifically for clients.

This guide is relevant to full service agencies, creative, digital and media agencies alike. Some of the insights may appear obvious, but they are included because prospect clients all too often comment that pitching agencies 'win on inspiration, then lose on administration'.

Used in conjunction with the other DMA pitch advice documents shown at the end of these recommendations, agencies will be able to plan pitch strategies more effectively and win a higher percentage of their pitches.

Each section of the guidelines is headed with a 'View from the bridge', representing key insights that have been highlighted by client research or experienced observation by the authors.

How to get on a pitch list

View from the bridge

Solve client problems and build inclusive relationships:

What are the two biggest factors that determine which agencies make it onto clients pitch lists?

- a. Agencies that clearly demonstrate how they can solve the client's specific marketing or business challenges
 - b. Agencies who can show clients how they will build and nurture an inclusive working relationship between the parallel teams; one that adds genuine value to the client's business
- **The cold approach.** Whilst many agencies believe that a berth on a pitch is down to personal contacts and networking, clients are keen to stress they are much more open to cold approaches than agencies may think. Yes, they admit, agencies will have to be persistent and imaginative in their approaches, but there are firm believers client-side who say that an agency that has worked consistently to get 'on their radar' deserves strong consideration when a pitch is called. So be persistent and imaginative.
 - **What is the most effective first approach?** One of the biggest mistakes agencies make is to talk about themselves, rather than to quickly show how they can solve the client's key marketing problems and add real value to the business. Agencies need to demonstrate real sector insight and provide hard evidence of how they can generate better results – ideally demonstrating how they are doing this for their clients already. Clients also favour those agencies who excite them and who they perceive they can best work with.
 - **Presenting your agency to intermediaries.** Agencies believe they are 'different' and that each has a unique story to put to clients. But client feedback clearly indicates that many agencies are saying the same thing. So spend time with the intermediary, or an independent pitch doctor, to understand whether your agency's approach actually is distinctive and stimulating. They see hundreds of agency credentials every year and are well placed to give objective advice.

Pitching as the incumbent

View from the bridge

Find out what your clients are really thinking before deciding whether to re-pitch.

The more informed you are, the better your decision-making and planning for a re-pitch; or judgment not to go ahead.

Is your perception of the relationship the same as your client's? For example, agencies often focus on senior relationships and overlook potential issues elsewhere across their teams. What are the real reasons behind the re-pitch? Unless you can identify and address these you may be wasting your time and resource. If there is a statutory re-pitch, does it really have to go ahead on a competitive basis, or is there a better and acceptable alternative for your client to consider? As the incumbent do you have an advantage or not? Can you still rescue a failing situation?

Stop guessing, working blind or falling victim to perception gaps. Find out the facts, fine tune your agency approach and proceed with the re-pitch based on renewing a positive and trusted relationship, nailing your clients' future needs and standing out compellingly from your competitors.

- **Deciding whether to pitch.** Each situation is unique and nothing can replace face to face conversations with all key clients to understand the real reasons behind the calling of a pitch. Intermediaries are very clear that the true reason will lie in one of three places:
 - i. a need to change the team
 - ii. a need to change the strategy
 - iii. money

In the current environment, procurement are increasingly likely to be involved throughout the pitch process. So, if an intermediary is involved in the pitch ask them directly what their point of view is, given they will have been party to very frank conversations about your agency.

- **An alternative suggestion.** If, during your discussions with clients, you find that the relationship has not irreconcilably broken down (and that both sides share some responsibility for the current situation) you could suggest that you are asked to respond to a complete pitch brief in order to re-set the relationship – a 'One Agency' pitch.

Alternatively, propose independent marriage guidance via a relationship health-check consultant where both parties can learn and benefit from a relatively small investment. If these do not have the desired outcome then the client can obviously move to a full competitive pitch, with all of the risk, resource and cost implications that entails.

- **Living up to the contract.** If a formal contract exists it is obviously incumbent upon the agency to adhere to the terms of the termination clause and notice period. Experience suggests that talking openly to the client about the contractual requirements, specifically how to separate work in progress from the pitch, is time very well spent from both parties points of view.
- **Understanding your TUPE obligations.** You must understand the implications of these regulations for your client and agency. Seek legal advice and/or consult the employment specialist in the DMA Legal & Public Affairs Department.

Pitching if not the incumbent

View from the bridge

Identify the *real* reasons behind the pitch before deciding to invest your agency's precious time. Also, do not sleepwalk into a 'death by a thousand cuts' scenario.

In the race for new business, agencies can often make blind and naive business judgments about whether to participate in new business pitches. Frequently they also fail to recognise the challenges of being 'sucked' down a funnel of competitive stages, with each level requiring further work commitment.

Why are we here? Research clearly demonstrates there is often confusion and mistrust around the client's rationale for staging a pitch in the first place.

Some clients feel awkward about discussing the real reason for change, especially if it is due to relationship failure, politics or costs. Other clients can mask or dilute the primary reasons for reviewing an account.

Pitching agencies therefore need to read carefully between the lines before deciding on the risks and rewards of proceeding. It is all too easy for an unsuccessful agency to blame the client for wasting time and expense after the event – albeit, occasionally, with justification.

However, unless you can ensure upfront that you have a reasonable and fair chance of winning the pitch, it might be better to not proceed, to get much firmer reassurance from the client or maybe to suggest something different, such as a 'one agency' re-pitch.

Completing a request for information (RFI)

View from the bridge

Agencies seeking to get ahead of the game must do much more than just answer the questions set.

Find out what the client really needs and wants from an agency. Read between the lines. Then embellish your answers to demonstrate how your agency can compellingly deliver – both in terms of work and relationship. It's all about differentiation.

The most successful agencies will set themselves many more questions to answer, in the knowledge that most of the competing agencies will do just what was asked of them.

The majority of clients see the RFI as an essential first stage to objectively comparing key agency criteria. Agencies rarely share this view, many seeing the RFI as a tiresome, repetitive exercise that allows little scope for differentiation.

This is a crucial mistake that many agencies make. Thinking of it only as a form that has to be 'worked' through rather than 'crafted' can lose you valuable points. Agencies should look to write these in a tone that resonates not only with the brief but also who they are. Clients are looking for you to talk to them, not at them. If you understand their problem you should use language that proves you do. If nothing else it shows who can and who can't write engaging copy, an issue that is crucial even if the pitch is media only – the RFI needs to stand out and be compelling.

Though it is apparent that some clients do use the RFI more subjectively, their message to pitching agencies is consistent:

- **Make sure your answers are tailored to the brief.** You may well have been asked exactly the same question before by another prospect but nothing irks more than evidence of 'cutting and pasting'.
- **How keen and hungry are you?** An RFI may look like a dry box filling process created by procurement, but agencies that demonstrate desire and passion in their response will fare better. Simply assessing how interested an agency is in the prospect's business can be a key determinant in who goes through to the next stage.
- **Differentiate yourself.** Again, clients insist agencies need to work harder to differentiate themselves from one another; difficult as it may be within the constraints of a structured RFI. You need to stand out. Most agencies think they do. Most clients vehemently disagree!
- Read the [DMA's How to find the right direct marketing agency client guide](#). We strongly recommend that all pitching agencies look at this process 'through the eyes of your prospects'. You will find the practical tips and clues within these guidelines invaluable.

Successful chemistry meetings

View from the bridge

Make the client feel at home from the moment they arrive at the agency.

Think through every aspect of the prospect client's visit. Focus on making this the most positive, comforting experience.

Remember, differentiation is often about attention to detail - from the personalised car park sign or travel directions, to the prospect's recognition by your receptionist and their pre-prepared name badges. Plan the journey from reception to the meeting room with someone who can 'talk in a lift'. If possible, have some of the prospect client's products in visible use within the agency.

Sort the meeting room. For example, arrange the prospects seating position so they cannot stare at distractions out of the window. Think about room temperature, refreshments and even who will pour the drinks.

These small details all make a positive impression. And, if the client is sitting comfortably, you can begin your presentation knowing you have their undivided attention.

Agencies frequently feel their first meeting with client is a lottery. Clients approach these meetings with trepidation and excitement in equal measures. Privately clients often admit that they have not properly prepared for these early meetings. So clearly there is work to be done by the agency to improve the value of these first encounters and agencies should seize the initiative to positively differentiate themselves:

- **Ask more questions in advance.** Be very specific about what you should cover and how you should cover it. Find out in advance what really matters to the client, so that you can use all of the meeting to build chemistry and relationships. Consider developing some relevant thought pieces so you can demonstrate your agency's expertise and distinctive way of thinking.
- **Own the session.** Many clients and introduction agencies say that agencies should take firmer control of these sessions, having agreed what the client really wants out of them in the first place. Clients are happy for agencies to shape the meeting as they see fit as long as their questions get answered.
- **Credentials?** Be very clear whether these should be presented in the meeting or whether it is best they are sent in advance, but don't assume the client will have taken the trouble to look at them. Clients' interest waivers on the subject markedly. The danger is that credentials quickly turn a chemistry session into a one way agency presentation.
- **Fielding the right team.** Evidently clients are suspicious of meeting just the new business or management team and want to meet those people who they will work with on their account, or at least someone who represents the type of person who could work on their account. They understand that the agency hasn't met them yet and so will also be trying to assess who would be most suitable for each client.
- **Explain the how and the what.** Again, clients say that agencies need to work much harder to differentiate themselves, explaining not just what they do, but how they do it more effectively.

Better pitch preparation

View from the bridge

In direct marketing pitches, clients are as likely to be buying the team as they are the strategy or the creative.

Agencies often forget this, believing they will blow the client away with their thinking and work on the day. Concentrating on building confidence in your team from the start will bear more fruit.

A good example of the importance that clients attach to the in-depth quality of the agency's pitching team was highlighted recently during the marketing director's feedback to the winning agency's MD:

'We saw some great pitches and really insightful creative approaches. We then asked ourselves... when something goes wrong, which agency would we call on a Saturday morning to get us out of the mire? And that's why we appointed you.'

The moral of the story? Direct marketing clients are as likely to be buying the agency team as they are the strategy or the creative. So try to win on both counts.

Although some of these recommendations may seem obvious they form a useful checklist. Pitch research reveals that many agencies fail to cover all of these points during their pitch, often to their cost.

Frequently, in the heightened state of a pitch, when both parties are finding out about one another rapidly, small points (positive and negative) are magnified in terms of their importance:

- **Developing a strategy to win.** On many occasions agencies manage to beat themselves due to poor timing keeping, poor structure that makes it hard to follow, or poor performance due to lack of rehearsal. And sometimes just getting these right will win the day. Intermediaries suggest agencies could learn from B2B sales training where different strategies are developed in order to win the day. This requires agencies to work harder at defining how they will position themselves in the minds of the client team. The provocative challenger? Swift and nimble? Depth of resource? When using the chemistry meeting prior to any Q&A or Work In Progress (WIP) meetings, the agency should listen hard to determine the client's primary needs from an agency – and then consistently re-enforce their positioning throughout the pitch process.
- **Answer the brief.** Read the brief. Re-read the brief. Agencies lose sight of the specifics of the task as they undertake rapid immersion in a client's business and begin drafting their strategic response. What and why are the exam questions being asked? Have they all been answered? Keep checking back.
- **The importance of Q&A sessions.** Never treat these sessions lightly. Clients believe they are instrumental in assessing the prospective agency teams and identifying true differentiation. Sending questions in advance so that clients can prepare is crucial. Testing your point of view, as it develops, is also very well received. Clients stress this thinking doesn't have to be 100% right either; they just want to see how the team's cogs are turning. Find out where the hygiene bar has been set. There is nothing worse than talking about something they regard as the basics.
- **Work In Progress/tissue sessions.** Crucial in assessing how fast the agency can absorb a brief, how collaboratively they really do work with clients and what access they give to creatives. Most clients much prefer to work with rough scamps, concentrating on the core idea, than to see evidence of half polished studio mac visuals. From a media perspective this tends to involve constant dialogue rather than set meetings, gauging client reaction and asking further questions as the media plans evolve.

- **Doing the maths: attention to detail.** Too many clients pick this as the one area where agencies let themselves down: poor arithmetic, poor assumptions or just a complete lack of detail. Additionally, some clients suggest that agencies try to gloss over this section in the pitch, believing it is only of interest to procurement. Best be clear exactly what should be covered in the pitch, label all assumptions clearly and double check all of your maths.
- **Talking to the client's other agencies.** Beyond making crucial store visits, buying online and via the phone, testing customer service etc., speaking with the client's other agencies (if permitted) is increasingly considered crucial, given the importance of agency co-operation on an on-going basis. Hence clients seek effective collaboration with their other agencies and marketing suppliers. Indeed, they will often take soundings from these agency partners regarding who has been in touch and who has impressed them through the pitch process.
- **Dealing with procurement.** It is increasingly important to develop a relationship with the procurement department or, in the absence of procurement, an independent auditor. Understand how they want information presented and what processes they use. Be warned, some agencies still demonstrate real reticence in their dealings with procurement and this has an adverse effect on the client's perception of them. Specifically for media and full service pitches, there is rigorous analysis of the media buying rates and this now makes up a large proportion of the final score card. This relationship is very different to the one required with the client and should be acknowledged as such.
- **Payment by Results (PBR).** Clients certainly want to hear each agency's reaction to the possibility of implementing PBR and react very positively to agencies raising it. But, be aware: do not be tempted to offer PBR as a shallow gesture, as your prospect will most likely want to know exactly how this system works across your other clients, because many clients are finding PBR arrangements difficult to implement and are looking for help. Feedback suggests that whilst PBR arrangements based on 'hard scoring' alone (e.g. acquisition targets, cost per sale, churn rate reduction etc) are tougher to implement fairly, agencies might well want to look at including 'softer-score' objectives in their response (e.g. quality of planning input, account team responsiveness).
- **Copyright.** Research highlights that agencies do not go far enough in protecting their work, strategy, media plans or ideas in pitches. Indeed only 50% of agencies bother to make clear in writing, before or during the pitch, who owns the copyright to the ideas being presented. Reasons range from laziness and lack of time, through to fear. Most clients say they would welcome and respect a more formal system for copyright, rather than relying on uncertainty and good will. They state it shows professionalism and that agencies truly value their work.
- **Pitch fees.** 77% of agencies never ask for pitch fees. Very few clients pay a fee and if they do it is a nominal figure, between £1,000 and £5,000, and normally for a creative rather than a media pitch. If you are going to ask for a pitch fee then you will need to have very strong justification for it: for example, providing fresh market research or new product and media ideas. Also, be careful to make clear up front to the prospect who owns the copyright to any ideas or work presented.
- **Understand the client scorecard.** As crucial as it is to constantly remind the pitch team of the exam questions in the brief, it is also vital to understand how the client team will be assessing the pitches. Some clients may provide their scorecard upfront. If they do not, agencies should ask for a copy, not least because if the client hasn't created one it will prompt them to do so. A copy of a typical client scorecard can be seen on the DMA website within the equivalent [How to find the right direct marketing agency guide](#).

Pitch protection

Non Disclosure Agreements, Copyright and Intellectual Property, DMA Pitch Protection Register

View from the bridge

Many agencies fail to protect their interests in pitches. This often leads to problems, which can easily be avoided with good housekeeping.

For each pitch, an agency should ensure that it has in place:

1. Non Disclosure Agreement
2. Intellectual Property Statement – covering copyright notice, etc
3. DMA's Pitch Protection Scheme – pitch registration

The DMA strongly advises both agencies and clients to acknowledge these professional practices as part of best pitch practice.

1. Non disclosure agreement

A non disclosure agreement (NDA) is not a copyright agreement (although it can include the definition of pitch response) – you must have both in place to protect your interests.

- **Sign an NDA.** The NDA should cover the mutual exchange of information, protecting your interests and those of the prospect client. By suggesting an NDA to your prospect client at an early stage of discussions you demonstrate your agency's professionalism and good housekeeping.
- **Download the latest DMA member [NDA template](#).** The DMA's NDA template is often the best starting point as it is both impartial and comprehensive, saving the agency or client the hassle and expense of drafting one themselves. Most clients will accept the DMA's independence.
- **The NDA should also be accompanied by a separate [Copyright and Intellectual Property Agreement](#).**
- **Agencies must take the NDA seriously.** Make the team fully aware of the need to protect confidential client information and, ideally, you should create a 'who has what' NDA agency register.

2. Copyright and intellectual property protection

Copyright is part of intellectual property rights – together with trade marks, patents, design rights and database rights. Copyright specifically relates to the expression of an original idea, but not the idea itself.

- To acquire copyright protection you need to turn an original idea into something tangible (i.e. create your proposal or copy and record your ideas in writing, visuals etc).
- Copyright protection arises as soon as the work is created, so it does not need to be registered in the UK.
- However, pitching agencies are advised to mark their pitch document and related creative work with a 'copyright notice', i.e. agency name, year. It acts as a deterrent to anyone seeking to steal the work and may assist in the event of infringement proceedings. It is also necessary when dealing with certain foreign countries.
- Deal with the ownership of the copyright in a pitch process through a written agreement.

The DMA has produced an [introductory guide to intellectual property rights](#) in association with Pinsent Masons. Pitching agencies are strongly advised to refer to this to help protect their work and ensure that they do not infringe the rights of others.

3. DMA Pitch protection scheme

The DMA maintains an online private register for agencies, enabling you to easily record and protect the ideas and contents of a particular pitch. It provides a way to record what is in the pitch and acts as an effective deterrent in preventing the prospect or client from potentially infringing the agency's copyright in the document or creative work submitted.

- Simply register each pitch online and upload the pitch documents and creative work
- Provides evidence that your organisation created the ideas or content first
- Attach the pitch protection certificate to the documents you submit to the client
- Check whether registering any materials submitted to the client in the pitch with the DMA pitch protection scheme will breach the terms of any non-disclosure agreement you may have signed with the client before sending the material

Click [here](#) for more information and to download the [pitch protection form](#).

The presentation

View from the bridge

Tell the client a powerful story they will remember... and keep the fine detail for the leave-behind documents.

A compelling story gets your single-minded idea across more effectively and helps to differentiate you in the client's memory. Invariably it also enables the client to understand and appreciate the benefits of your ideas more clearly.

What advice do leading clients give to pitching agencies?

- Field the right team. Do not field senior people if they will not be working on the business day-to-day. Do not let junior people just 'sit like lemons' during the pitch. Give them a role and rehearse them thoroughly.
- Stand out. The recent pitch process insight study specifically asked clients how the behaviour of winning agencies stood out. Accepting that each pitch task is unique, the answers demonstrate that those agencies that manage to pitch at a personal level are more successful:
 - The agency didn't just say it was different, it really was... and for all the right reasons – thinking, approach, execution, plus a team the client wants to work with
 - The business case was compelling
 - Their approach, thinking and execution are aligned. There is a natural flow from planning through to creative and media
 - They focus on selling the big idea, rather than an execution or fine supporting detail. The client may be seeing a number of pitches on the same day. To stand out you need to spend the limited pitch time exciting the client with big ideas, whilst demonstrating how you will build an 'added value' working relationship across the teams. Leave the fine detail for the support document and don't clutter your pitch. Too many agencies end up presenting the latter, working through complicated charts and every permutation of creative in order to show 'we covered it!' Too much for clients to take in...and certainly not differentiating.

So, make the presentation single-minded and use document to show you got it covered. You can always follow up after the pitch to reinforce any specific details within the document – often a good opportunity to ensure you stay top of mind and deal with any queries.

- They don't assume the client knows everything about the sector. Hence immerse themselves in a sector, finding fresh new insights and showing how these can add business value
- Compelling ideas nearly always work across all media, and show how media can be used inventively
- Strong teams stand up well under cross examination
- Refreshing honesty. They say what they can do well and where they need to partner to provide a solution
- There's a strong belief in what is being presented
- Good agencies have an ability to simplify what was probably an imperfect and multi-headed pitch brief
- It was a discussion, not a presentation
- And finally, presentation technique. A loud call from clients for agencies to simplify their approaches:
 - Avoid PowerPoint; use boards where possible
 - Do not over run, plan a tight presentation
 - Be clear what is being presented and in what order
 - Don't take too long to get to the creative work, media plan and ROI
 - Be very careful with gimmicks, they easily backfire
 - Inject passion, energy and belief
 - Rehearse, rehearse, rehearse

Managing procurement and e-auctions

View from the bridge

Agencies must seek clarity upfront from the client on the likely involvement during the pitch of procurement or e-auctions.

Agencies can then make an informed decision on any potential consequences or increased risk.

It is important to establish this with the client upfront before committing to any pitch time or cost.

Managing Procurement

Many clients are increasingly involving procurement in a variety of roles as a part of the pitch process. Frequently this is a positive development for all parties, as well as an inescapable reality.

If procurement are to be involved in supporting client decision making – regarding appointment, business terms and contract, or both – then we advise that agencies:

- Request that procurement are part of the client pitch team from the start, so they can fully appreciate the pitch process and level of work that is required from the agencies
- Positively engage with procurement to help them understand how the client can get the best value from the agency's work and relationship
- Work with them to understand how the agency can be fairly remunerated, based on known and unplanned client requirements.

Remember that agencies often benefit from a positive ongoing relationship with procurement, plus a comprehensive contract. This can be helpful in the event that unreasonable work or cost demands are made by certain individual clients. In these circumstances procurement can act as the honest broker, helping to resolve or diffuse otherwise potentially awkward client conflicts.

E-Auctions

In the event that e-auctions are to be a part of the pitch, or if the pitch is likely to culminate in a final e-auction shootout, then it is essential for this to be made clear at the outset of the pitch process, rather than being introduced as an undeclared stage in the selection process

An e-auction should not be used as an extension of a creative or strategic pitch. It should be a stand-alone process based on a client's understanding of the agencies they wish to participate – and not requiring any significant work on the part of the agencies in advance. Agencies must try to establish this from the start of the process.

The DMA advises agencies not participate unless these conditions are met. Clients must be transparent and upfront about the potential use of an e-auction, before requesting agencies to spend time and cost on developing strategic or creative ideas.

The appointment

View from the bridge

Protect your agency's interests from the outset, because often the practicalities of the client's day-to-day work requirement will prove very different to the pitch brief.

Above all be clear about what is and what is not covered by your remuneration arrangement. Also, ensure that you put a relationship monitoring system in place across all levels of the team, especially covering agency/client project manager relationships.

The pitch has been won. Now the hard work begins:

- **The client roster.** Firstly, if you have won a place on a roster then there will always be the need to be proactive and to prove your hunger and freshness. Sadly, clients do not see rosters as giving agencies a sacred right to fee-paying work
- **Dealing with the press.** Press relations continue to be a source of much friction and distrust between agencies and clients. Be sure you understand what can be said to the press in relation to any aspect of the pitch, the appointment and what this might say about a possible shift in the client's marketing strategy
- **Plan proper inductions.** Ensure you book key inductions across the client's business and with their other marketing agencies; and ensure you receive all of the key business and planning documents as soon as possible
- **Agreeing working practices.** Separately, sit down and agree how you will plan and develop campaigns. What will standard agency turnaround times be? What is the media sign off process? How does legal sign off work on the client's side? Agree a set of working practices in advance of the first 'live' creative work so that there are no nasty surprises that impinge on the quality of the work or lead to missed deadlines, souring the relationship in its infancy
- **Getting to know your new clients.** Work aside, find time to get to know your new clients in a social setting
- **Putting appropriate health checks in place.** Take equal responsibility with the client for agreeing how the client / agency relationship will be monitored. Do not leave this up to the client. What KPIs are the client and agency working to? What evaluation process and form will be used? All relationships, even the strongest, need re-appraising from time to time and the best client / agency relationships are characterised by on-going formal review procedures, two way dialogue, honesty and chemistry.
- **Nailing the contract.** Experience says that both sides should agree a date by which the contract will be signed or it will drift and drift. Check the DMA's website for the latest terms to include within your agency contract.

And finally... How best to avoid a client review

View from the bridge

Understand and anticipate your clients changing needs, in terms of both business and individual support.

Business has never been more competitive for clients and agencies. And it's getting tougher.

To retain and build today's clients, agencies need to be smarter. At best, this means staying ahead of the game in terms of new ideas, solutions and working practices. At least, this means adapting quickly to changing client needs and staying 'vital'.

Most agencies will want to avoid a competitive review; although a few may confidently acknowledge the review as a way of renewing their contract and revising their remuneration.

Outside of statutory review timings, most client reviews are the result of either a breakdown in the relationship, issues with the work, a change in requirements or a change in client management. Often the client will not be clear or totally transparent regarding why they are reviewing.

What undermines an agency-client relationship? The pitch process insight report identifies six reasons:

- Service dissatisfaction
- Weak financial management
- Poor results
- Creative issues
- Poor communication
- Lack of new ideas

So, can an agency avoid an unwelcome review? The key is to take action before it is too late and the client has made up their mind:

- **Use third-party 'marriage guidance'.** If your relationship with your client has not broken down but there are issues to resolve you may wish to use an independent relationship intermediary to conduct a 360 degree relationship 'health-check' to identify the barriers and help mutually resolve any issues.
- **Suggest a 'one agency' re-pitch.** This will give the agency both the opportunity and excuse to introduce new blood and thinking onto the client's account and hopefully address known issues. The agency will then either rise to the challenge, or not. The client potentially will get to keep the good bits, whilst clearly seeing changes where needed. Hence both parties avoid a time-consuming and expensive re-pitch.



Further references

These are all available at the [DMA website](#):

Pitch process insight survey

<http://dma.org.uk/toolkit/pitch-process-insight-survey-2008>

'How to' guide: Find the right direct marketing agency

<http://dma.org.uk/toolkit/how-find-right-direct-marketing-agency>

Request For Information template

<http://dma.org.uk/toolkit/request-information-rfi-template>

Non Disclosure Agreement

<http://dma.org.uk/toolkit/non-disclosure-agreement>

Suggested Terms & Conditions between agencies and clients

<http://dma.org.uk/toolkit/suggested-terms-and-conditions-contract-agreement-between-agencies-and-clients>

The DMA pitch protection scheme

<http://dma.org.uk/content/dma-pitch-protection-scheme>

About the DMA

The Direct Marketing Association (DMA) is Europe's largest professional body representing the direct marketing industry. With a large in-house team of specialists offering everything from free legal advice and government lobbying on direct marketing issues to research papers and best practice, it is always at the forefront of developments in the industry.

The DMA protects the direct marketing industry and consumers. It promotes the highest standards through self-regulation and lobbies against over-regulation. The DM Code of Practice sits at the heart of everything we do – and all members are required to adhere to it. It sets out the industry's standards of ethical conduct and best practice.

Our 16 DMA Councils/Board Committees cover the whole marketing spectrum – from the digital world of social media and mobile marketing to the 'real' world channels of door drops and inserts. The Councils are made up of DMA members and regularly produce best practice and how to guides for our members.

We also have a packed calendar of conferences, workshops and discussions on the latest topics and best practice, and 80% of them are free for members and their staff.

As the industry moves on so do we, which is why we've recently launched a number of new services for our members – a VAT helpline, a Social Media Helpdesk and a Pitch Protection Service.

Visit www.dma.org.uk regularly to keep up to date with all our services.





Copyright and disclaimer

The Win more pitches how to guide is published by The Direct Marketing Association (UK) Ltd ©. All rights reserved. No part of this publication may be reproduced, copied or transmitted in any form or by any means, or stored in a retrieval system of any nature, without the prior permission of the DMA (UK) Ltd except as permitted by the provisions of the Copyright, Designs and Patents Act 1988 and related legislation. Application for permission to reproduce all or part of the Copyright material shall be made to the DMA (UK) Ltd, DMA House, 70 Margaret Street, London, W1W 8SS.

Although the greatest care has been taken in the preparation and compilation of the Win more pitches how to guide, no liability or responsibility of any kind (to extent permitted by law), including responsibility for negligence is accepted by the DMA, its servants or agents. All information gathered is believed correct at July 2013. All corrections should be sent to the DMA for future editions.