

CHAPTER 2

TO PITCH OR NOT TO PITCH

Just Say No!

Before you embark on a new pitch, you should be asking yourself one extremely important question...

Should we be pitching this account?

I know what you are thinking... Levitan's kidding right? We've made it through the RFI and RFP stages, and now he wants us to ask if we should even be going to the finals?

It's still ok to say "no", and now is the time to take a deep breath and review a go-no-go decision. You are about to spend a great deal of time and money. Are you sure that you should go through the next step? Are your colleague's groans getting louder? Looking in any way ambivalent about the pitch will not help your pitch team feel good about charging into it. Passionless pitches don't win.

Pitch or not is usually one of the most difficult decisions agency management has to make. There is a good chance that you think that you've already

answered this question if you participated in an RFP that led to your selection as a short list candidate. I believe that even if you've performed a sound decision making process, now is the time to stop to determine if this potentially expensive pitch is worth the time, effort, and human and cash cost.

Some agencies view pitching as a numbers game. Swing at more pitches, and you'll get hits. Unfortunately, whiffing will drive down your batting average and the agency's profitability. And eat at its soul.

Really, just stop for a second and think this one through. This is the time to dig deep, and ask yourself if you actually have a good chance of winning the account *and*... if this is the kind of client you really want. Is this client qualified to be *your* client?

The Pick Two Decision

As an agency owner, I always cherished four client attributes. Frankly, if I could get just two of these, I'd be happy. Our client Nike delivered all four.

1. **Fame.** Famous clients look great on your client roster, act as poster children for prospective clients that need third-party reassurance that you deliver results, help you woo more talented creatives, and having famous clients will make your mothers proud.
2. **Creative.** You are in the creative services industry because you are creative and want clients who respect creativity. Creativity to me extends beyond just the creative idea into creative media, strategies, consumer insights, and technology. That said, the bottom line for most agencies is that we want to make great advertising programs, and to get there, you need clients that want that too.
3. **Cash.** Fame is nice. Clis are nice. But cash rules. After all, you are in business. In this case, money means having clients that deliver agency profits. No profits = no staff, no creative, no brilliant social media strategies, no awards... no agency.

4. **Nice.** Early in my career, I was given the advice that I should only work with clients who align with my agency's values and share mutual respect. To take it a step further... work with nice people that you like. If I appear to have gone all gooey, I listened, and it was great advice. Life is too short to work with assholes.

The pick two-decision will help you begin to confirm that you should be pitching this client.

But, there are a few more important things to consider and weigh as you make your decision to proceed.

- Does this client need what you have to offer? Is your experience, expertise, or creative product what they really need (or think they need)?
- Do you know the client's agency selection criteria? Do you think you meet it? Are you the right fit? Can your agency really handle this client? Would *you* hire you?
- Has the client clearly stated what they are looking for? Do they sound smart?
- Has the client discussed budgets and their compensation system? They might not want to provide details, but you should have a good perspective on a range and a system. Too many agencies have gone months deep into a pitch only to find out that they can't afford to work with the client.
- What is the client's agency history? Are they perceived as being a good client? Are they loyal or fickle? Burger King has had at least twelve AOR agencies since 1970. Toyota has had one.
- Is your agency so specialized that the client must hire you?
- Is your agency's location a plus or a minus? Specialists can be further away.

- Are you the outlier agency? The one that's simply invited to round out the list?
- Have you met with client management and started a relationship? Are you simpatico? If you haven't met with them, you should insist that you do it now before you get too far down the road. It is in their best interest to want to meet before the big day.
- If the pitch is managed by an agency search consultant, have you begun to understand *their* role, process, and motivations? Do you know them? Are they being straight with you?
- Is the incumbent in the pitch? If so, why do you think that the client might be replacing them? It is possible that the incumbent is a lock because the client is obligated to put the account up for a procurement-driven review on a scheduled basis? Try to figure this out.
- This next question could be the toughest. Is your agency the incumbent, and should *you* bother pitching your client? Ouch. Clearly, this will be a one-off gut-check question that only you can answer. While you are thinking, keep this less than appealing statistic in mind. According to Advertising Age, "*After all, fewer than 10% of incumbent agencies are estimated – by the reckoning of either the 4A's, industry consultants or Ad Age – to hang on to an account at the conclusion of a review process.*" Because of these odds, many agencies have a no-defend policy.
- Finally, does agency management really want this client? Are they psyched? Will they fully support the pitch?

There are a lot of questions to consider before you say – Go. If your analysis of the situation produces wobbly answers, dig deeper and make an objective decision.

The Go Quiz

Since there are so many moving parts to making the all important ‘Go’ decision, I developed a quick handy-dandy quiz that you and your senior team can take to help you to decide if you really want to spend the time and money to pitch this account. The quiz will even start to help you think through what you will need to say and do to win the business.

The quiz isolates a set of decision-making criteria and employs easy math to calculate your interest in actually pitching the account. You can, of course, add or subtract criteria. The point is to use some gray matter and time to make the right call. You do not have to pitch every account that comes knocking. In fact, don’t.

Note: Since this is a strategic decision, and you really don’t want to show your staff that you are taking a quiz to make the decision, I wouldn’t put this quiz in front of the agency or the pitch team. It’s just for management. OK, maybe you could share it after the fact to show that you are actually thinking through the Go decision-making process.

Each question has three answers ranked from 0 to 3. There is also a bonus question related to incumbency. If your total score is over 10 then you have no choice but to go for it. A 4 to 9 score is where you will have to use your gut and personal experience to make the decision. 3 or less and I’d think hard about ditching the pitch, and instead, take everyone in the agency out for a beer.

A note: All client, pitch, and agency motivations are different. You might want to modify this list depending on your own situation.

1. Do you know the decision maker?

0 – You’ve never talked to them.

1 – The client came to you through a personal referral.

2 – You are on a first name basis with the client. Maybe you’ve worked together in the past.

2. Do you have any history with the company?

0 – Never crossed paths.

1 – You worked with someone at the client who can vouch for the quality of your agency.

2 – You worked directly with the client or one of their brands in the past.

3. How professional is the client's agency selection process? Answer either the client or the agency search consultant questions only. (A or B, not both.)

A. Is the person running the pitch experienced?

0 – They have never ever run a pitch before.

1 – They are acting professionally.

2 – They have run pitches before and even sound like they are using the 4A's and ANA pitch guidelines.

B. Is the client using a search consultant?

0 – You don't know the consultant.

1 – You have pitched the consultant in the past but lost.

2 – You have won business from the consultant.

4. Is the client in a category that your agency has targeted?

0 – No.

1 – Yes.

2 – Yes, and we have a dedicated business development effort to add clients in this specific category.

5. Do you have direct category experience?

0 – You have none. Um, what’s a Widget?

1 – You have worked with a similar company or brand in the client’s category.

2 – You are perceived as being a leading expert in the category. This is probably due to prior client experience and recognized thought-leadership.

6. Do you know the client’s budget and / or how they plan to compensate the agency?

0 – You have no clue, and the client isn’t forthcoming.

1 – The budget seems low, but you are willing to gamble.

2 – We’re in the money!

7. Is the client looking for a “hot” award winning creative agency?

0 – You are creative but are not known for this.

1 – Recent campaigns have gotten you some industry attention.

2 – You have shelves full of Clios and were recently named to the ADWEEK Agency of the Year Something list.

8. Do you pitch well?

0 – Pitching hasn’t been an agency strength.

1 – You have won a third of your pitches.

2 – You are so good at pitching that you have to pinch yourself.

9. How strong is your agency competition?

- 0 – They really kick ass, have a very high pitch batting average, and you should be worried.
- 1 – They are very similar to you.
- 2 – They look weak.

Ladies and gentlemen, your score is _____.

As a reminder: If your score is over 10 then you have no choice but to go for it. 4 to 9 is where you will have to use your gut to make the decision. Less than 3? It's Miller Time down at your local.

A Bonus Question: Are you the incumbent?

Just to complicate matters, are you the incumbent agency? If so, you need to think through why your beloved client has put the account up for grabs. Here is my simple litmus test.

- 1 – You have no clue why the client has put the account up for review.
Um, without knowing why, I'd back way off. It has been reported that only 10% of incumbents keep their account.
- 2 – You are the incumbent, and this is one of those pre-scheduled procurement-driven reviews. You know that the client loves you.
I'd go for it.

OK, Go.

If the client has passed your Go Quiz, then it's time to get to work.

I want to help and support you by working together to review all of the issues and opportunities that come with pitching and to help you use this book to win.

Managing how you craft your pitch, your time, and your staff will allow you to have the best possible pitch response ahead of your presentation deadline.