

FINDING THE RIGHT MEDIA AGENCY

**A best practice guide to
selecting Irish media
buying, planning and
consulting agencies.**

iapi

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Introduction

Finding a new media agency can be a valuable process, often driving opportunities, ideas and connections for both the clients and agencies involved. However, the process can also be time-consuming, complex and costly. Despite the ecosystem in which we operate changing at a rapid pace, the pitch process has changed very little. So, to move this forward and help all involved get the most out of the process, the IAPI Media Council working alongside selected certified Pitch Consultants have created the IAPI Media Pitch Guidelines. These guidelines are supported by The Marketing Institute and The Association of Advertisers in Ireland.

This guideline covers all aspects of the pitch, from deciding on the type of pitch required through to the handover process at the end. From an agency perspective this should help to make the process more transparent and provide clarity on what is required. For clients this should act as a template and starting point on which to build their own bespoke pitch, ensuring that the process is fair and equitable for everyone involved.

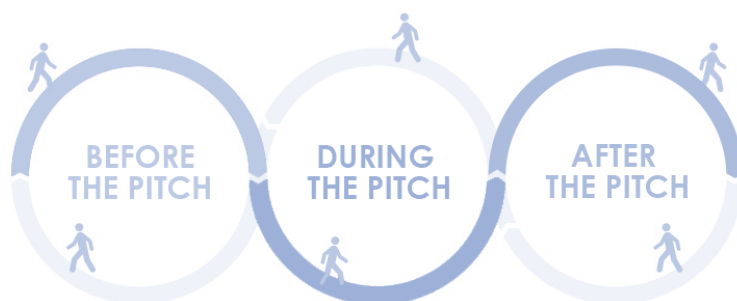


Table of Contents

BEFORE THE PITCH

IS A PITCH THE RIGHT THING TO DO?	3
Key Considerations	3
YOU HAVE DECIDED TO GO TO PITCH. NOW WHAT?	4
How Will You Run the Pitch?	4
Invite the Right Agencies to Take Part	4
Write the Brief	5

DURING THE PITCH

YOU HAVE WRITTEN THE BRIEF AND LINED UP THE AGENCIES. WHAT'S NEXT?	7
The Chemistry Meeting	7
Media Pricing and Agency Fees	8
Written Document Submission	10
The Presentation	10

AFTER THE PITCH

DOCUMENTS AND PRESENTATIONS ARE COMPLETE. DECISION TIME!	11
Follow up	11
Decision	11
Agency Feedback	11
Contract	11
The Handover	12

CONCLUSION

Appendix 1 - Sample score card	13
Appendix 2 - Award criteria methodology	14

IS A PITCH THE RIGHT THING TO DO?

KEY CONSIDERATIONS

Current agency relationship

There are many reasons as to why pitches take place; a new direction for the brand that may need a fresh approach, changes in your current agency team, a standard agreed contractual review and/or a review of costs. We recommend that prior to pitching, you should work with your current agency to assess the needs of your business and work towards potentially resolving the issues before deciding if a pitch is necessary.

A 360-degree analysis can be helpful in identifying the challenges and can offer valuable learnings for both the agency and the client. In many instances the issues can be resolved without calling a pitch. No IAPI agency wants to lose business and would ideally like to work with you to solve the issues prior to a pitch being called. We recommend that formal reviews should be held every six months during a contract period between you and your agency, in order to identify and address on-going issues so as to pre-empt them becoming serious or even fundamental in your relationship.

Current agency contract

Check the contract you have with your current agency and take note of the notice period and all terms of the contract. Notice must be given to the agency in accordance with your contract if this is the route you choose.

You should also consider the possible implications of TUPE. A "TUPE", or a transfer of undertakings under the EC (Protection of Employees on Transfer of Undertakings) Regulations 2003, occurs where there is a transfer of a business, or part of a business, which retains its identity after the transfer. In very basic terms, the Regulations provide that employees attaching to a business which is being transferred are entitled to "follow the work" and transfer with the business to the new employer on the same terms and conditions of employment (save for an important exception relating to pensions).

Cost of a pitch and internal buy-in

All pitches are costly in terms of both time and money for agencies and clients and should not be undertaken lightly.

So, before making the decision, careful consideration needs to be given to the resources required from both an agency and client perspective and if a full pitch is the best approach. Separating from your agency and transitioning to another one can be a difficult process that requires time and is not without risks. Agreement should be sought from all key stakeholders in the business, ensuring they have a full understanding of the level of investment and resources required before the pitch is decided.

Agency budgets and fees

It is important to be aware of the budget available. If the client media spend is likely to be less than €500k we do not recommend a full pitch approach as pitches are expensive for agencies and time consuming for clients.

YOU HAVE DECIDED TO GO TO PITCH. NOW WHAT?

HOW WILL YOU RUN THE PITCH?

Will you use a pitch consultant?

Selecting an agency is a relatively infrequent activity and it can be hard to keep your finger on the pulse of a rapidly changing agency marketplace and marketing communications industry, especially if it is the first time for your company to undertake a pitch. As a result, many marketers choose to use pitch consultants to help with the pitching process. IAPI and the AAI have jointly accredited a number of recommended pitch consultants who follow the agreed guidelines, which are reviewed every two years. A list of these accredited consultants can be found at www.iapi.ie.

Will you conduct the process in-house?

Many clients can and do decide to manage this process independently of consultants. The most important thing is to get your decision-making team in place as early as possible. Very often clients underestimate the time and effort required to complete a successful pitch process. We would strongly advise that key diary dates for your company's pitch team be agreed and blocked-off as soon as possible, so that your key decision makers are available and present at the vital meetings throughout the entire process.

INVITE THE RIGHT AGENCIES TO TAKE PART

Respondent numbers dependent on size of spend

Put careful consideration into how many agencies you invite to pitch. We recommend a two-step approach: step one is the chemistry meeting, a chance to meet the team and understand if you might work well together and for this we would recommend there are no more than 5 agencies taking part. Based on the chemistry meeting no more than three agencies should be shortlisted to step two, the strategic pitch. This is described in detail in the following section.

It is a good idea to announce the list of agencies taking part in the pitch as part of the openness that makes for better working relationships. Agencies should also be made aware of any late additions or withdrawals of agencies throughout the pitch process.

Are you inviting the incumbent to pitch?

It is important to be direct and clear with the incumbent agency, giving the required notice period as stated in the contract. Serious thought should be

given as to whether you wish the incumbent agency to pitch. Clearly identify if you do not wish to invite them to pitch and explain your decision.

Do you need an RFI?

A 'Request for Information' (RFI) is issued in the pitch process to gather information about an agency's services or products in an initial data-gathering phase. With the amount of information on agencies available online, consideration should be given to the RFI and if it is required.

If an RFI is required, your pitch consultant should be able to provide their own standardised RFI document. If you are not using a pitch consultant, agencies should also have their own standardised RFI documents.

NDA

Both you and the participating agencies should enter into an NDA (Non-Disclosure Agreement) also known as a Confidentiality Agreement. The NDA serves to protect both you and the agency covering copyright, intellectual right issues, and business or financial information.

WRITE THE BRIEF

Be upfront and give as much information as possible

This is a crucial stage of the pitch process as it will act as a guide to all the agencies in their responses. The purpose of the pitch brief is to give the agencies as much relevant and useful information as possible so they can develop a strategic solution for your business. Below are some recommendations on how to approach the brief and what should be included:

- ⇒ Pitches are very time consuming for agencies and clients alike and providing more than one brief creates a lot of work. If the brief is well written and challenging enough, you should be able to limit the pitch to one brief. If you need further evidence of an agency's approach or thinking consider asking them for an opinion piece, for example "How will media consumption change post Covid-19", rather than giving multiple briefs.
- ⇒ Remember that it is likely that only the incumbent will be very familiar with your business, so it is worthwhile providing a brief introduction and background to the company.
- ⇒ The brief should consider the current life cycle of the brand, what objectives need to be achieved and should be supported by relevant background marketing data and research.
- ⇒ To help agencies you should also include the reason that the business is up for review and what are the brand's marketing and communication needs.
- ⇒ To give a level playing field to all agencies, we recommend giving a fictional brief or one that has not been answered yet. Giving a brief for a campaign that has already happened makes it difficult for the incumbent to re-answer the brief, while other agencies' thinking could be affected by the campaign they have already seen live.
- ⇒ In the brief you should be realistic about your budget and be clear about the nature of the services that you believe your brand requires (e.g. some or all of brand planning/strategic thinking, communications planning, creative development, media planning and buying, digital, PR, events, etc).

The detail included in the brief will help agencies understand the scope of work and ensure that responses are aligned to your business objectives. Use it as an opportunity for the agencies to showcase their ability in solving your real business challenges. Ultimately the time and effort that is put into the brief will be reflected in the strength of the responses that you receive from the agencies.

Provide a detailed scope of work

The brief to agencies should clearly outline services that are up for pitch and those that are not. A response should be supplied only for what is within the scope. For example, if PPC/Search is excluded from the briefing document, then questions specifically about search should be excluded.

BEFORE THE PITCH



Be transparent with the scoring

A scorecard should be shared in advance of the pitch alongside the agency brief. This should clearly outline who are the decision makers in the process, state the marks awarded for each section and detail the criteria on which they will be judged. We have created a sample scorecard and methodology which can be found in the appendix.

Set clear timelines

A clear timetable of the pitch needs to be provided in advance and agreed by all parties before commencing. This should include all key meetings, deadlines, documents to be submitted and when agencies will be told of the final decision. This timetable should not change once the brief has been issued.

6 to 12 weeks is the suggested timescale for all pitches, from the initial briefing through to the final decision, if agencies are required to produce a full strategic response. Typically, an agency will divide the available time for a pitch into three roughly equal phases.

PHASE 1

This is usually the research or problem analysis phase, and might include an in-depth study of the client brief, desk research, exploratory market research, store checks, site visits etc.

PHASE 2

This output of Phase 1 is used to help produce the agency's proposed target audience definition, key consumer and category insights, strategic approach and media channel recommendations.

PHASE 3

Development of the complete strategy rationale, media solutions and implementation, media plans and proposed KPIs and results.

If timelines fail to meet industry standards, then agencies should notify IAPI and a complaint will be sent to the consultant or client.

YOU HAVE WRITTEN THE BRIEF & LINED UP THE AGENCIES. WHAT'S NEXT?

THE CHEMISTRY MEETING

Description

This is part of the long list process at the start of any pitch and many clients believe that the chemistry meeting with an agency can be as vital as the actual pitch, as it often quickly answers important fundamental questions like:

- Can we work together?
- Is this the sort of agency we want?
- Do they work well together as a team?

This meeting should be with key agency management and their proposed account team. For a really productive chemistry meeting you should tell the agency what you hope to achieve, what you want to see from the agency and if possible, what went right and wrong with the incumbent agency. Time should be allowed for questions and discussion and ultimately be a flowing two-way conversation, rather than just the agencies and clients presenting.

Allow for agency questions

Allow time for agencies to submit questions following the issuing of the brief and build this into your timeline. You should decide in advance if all questions and responses will be shared and communicate this decision clearly to all agencies involved.

Should agencies be eliminated after this stage?

Yes, we recommend that no more than 3 agencies are brought forward to the strategic round following the chemistry meetings. This shortlist should be decided based on the scoring criteria provided in advance to all agencies invited to pitch.

Should chemistry meetings occur for smaller pitches?

While this may seem like an exhaustive process, it could be well worth the time investment. Very often it challenges – or indeed confirms – a client's pre-conceptions about a certain agency. This can cut down on time wasted by having the wrong kind of agency on your short list.

Both agency and client should give feedback after this process

The scoresheet should outline how agencies will be scored at each stage of the process, including the chemistry meeting. All agencies involved should also be given a chance to feedback at each stage of the process. Ongoing client communication with agencies is essential to keep the pitch process on track.

MEDIA PRICING AND AGENCY FEES

Description

We recommend that only shortlisted agencies from the chemistry meeting are required to submit media pricing and agency fee documents.

There are two cost elements in relation to a pitch. Media pricing, for example the cost to run a TV campaign, and agency fees, what the agency will charge for their services. Pricing grids are completed in most pitches to benchmark all agencies ability to negotiate costs on behalf of a client. The client/pitch consultants should be upfront about the weight assigned to the pricing element of a pitch. All pricing needs to be dealt with in a confidential manner. Pricing grids should be sent out once pitching agencies are confirmed and completion of these should run alongside the pitch process itself.

Media Pricing

The below details should be included in pricing templates when sent to agencies for completion:

- Expected spend levels by media and supplier
- Details of the buy you are expected to cost up e.g. second length, audience, digital buy type, format size, desired quality levels, special requests etc
- The year for which the pricing is submitted against along with an area to include inflation estimates for the subsequent years
- Required format of costs- e.g. gross, net, inclusive or exclusive of VAT, discounts vs ratecard or € guarantee
- Section on budget variances and penalty information if required



On receipt of the pricing grids, all agencies should be given the chance to ask further questions to clarify any areas they do not understand. We recommend that a Q&A template is sent along with all grids and that there is an allowance of 1 week to give time for questions to be asked and answered before completion of these templates.

Agencies must not be requested to input costs for media they will not be likely to purchase.

DURING THE PITCH



Transparency

Pitch consultants should be able to identify pricing that is beyond the realms of possibility and outliers should be queried further with the agency who submitted. This will allow the agency to check if pricing was submitted in error before agreeing to proceed.

We also advise paying close attention to digital transparency. We recommend discussing this with your pitch consultant, who will advise on the right questions to ask to allow for full transparency and independent verification of all aspects of the media buy relating to digital. This could include:

- Demand Side Platform (DSP)
- Data providers
- Brand Safety technology
- Management fees
- Media costs – the amount a publisher receives

Agency Fees

These should happen alongside the pricing template. In order to complete this accurately the agency needs to know the following:

- The number of hours expected to service the account
- The types of roles/talent expected from the client e.g. PPC Manager, Head of Social, AV Buyer, Client Manager, Specialist teams etc
- The desired fee model if applicable - Base fee vs Percentage of media spend
- The Scope of Work requested

WRITTEN DOCUMENT SUBMISSION

Description

A written response, called the 'Request for Proposal' (RFP) or 'Request for Tender' (RFT), is sometimes required to answer the key strategic questions within the client brief. This is generally submitted in advance of the pitch presentation.

Consider the level of detail required

Consideration needs to be given on firstly if RFP/RFT documents are of value and required in addition to the pitch/presentation and secondly, if they are required, how much detail needs to be included. These documents often duplicate the work that will appear in the pitch deck and so may not be necessary.

If required, agencies will always want their documents to be impressive and as thorough as possible. This can lead to very lengthy documents which are time consuming to produce, and to read. Providing a page limit for every section/question will focus the agency and keep the document concise. We also advise against the request of detailed media plans as what is presented at this time is rarely the end product.

THE PRESENTATION

Description

The strategic pitch presentation takes that next step by creating speculative work in line with the proposed strategy to various degrees of finish for the pitch. This strategic pitch should be used to illustrate the agencies understanding of the brand and the brief as well as their strategic skills and media knowledge.

Logistics to be agreed in advance

- Be clear on timings and structure for the presentation and advise on what you expect to be included.
- Decide if the pitch will take place on the agency's premises, off-site or using video-conferencing facilities (Zoom, Teams etc).
- If off-site, advise the agencies on presentation facilities and allow advance access to the room.
- Ideally the agency should be able to set up before your arrival.
- Make sure your timings allow for at least an hour between each pitch.
- Provide clarity on who you would like to see present on the day (e.g. the team who will work on the account.)
- The decision makers should be present and include all floor levels that influence the brand.

DOCUMENTS AND PRESENTATIONS ARE COMPLETE. DECISION TIME!

FOLLOW UP

Allow both sides to follow up with any questions or further points following the pitch presentation.

DECISION

Decision should be made in a reasonable timeframe; we suggest a maximum of 6 weeks from the final pitch presentation. If this is not feasible, or the timeframe needs to be extended due to unforeseen circumstances, the agencies should be contacted and provided with an updated timeframe.

After the successful agency has been awarded the business, out of courtesy if the incumbent agency took part in the pitch, they should be told of the decision next.

AGENCY FEEDBACK

- Client and/or Pitch Consultant to do a follow up session with each competing agency to deliver feedback.
- This should happen within 2 weeks of the decision being made.
- Scorecard should be made available to the agency.
- Any complaints from the pitch process can be made directly to IAPI and will be taken into consideration for the accreditation of pitch consultants. This is to ensure that all pitches are fair and equitable for everyone.

CONTRACT

The contract should be clear and well defined to protect both parties and include a detailed scope of work that is agreed in collaboration between the agency and client.

THE HANDOVER

A clear and organised handover of assets from the old to the new agency is essential to the successful conclusion of the pitch process. This should be written into the contract with the agency. This should specify that the handover gets completed within the notice period and before the final financial settlement is made. Review your contract with the agency and honour the notice period, any outstanding payment due and consider any long-term media bookings.

Media booking, especially for TV airtime, is committed 6-8 weeks in advance. At certain times of the year such as Christmas, bookings can be required up to 3 months in advance. Planning work is carried out ahead of the activity happening. In this case, we recommend one of the following suggestions be included in your contract:

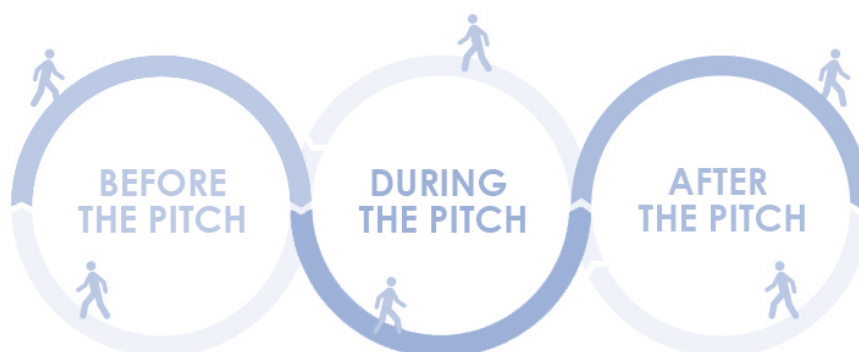
- There is a 3-month notice period between the decision to move the media business from the losing agency and the winning agency taking on the media buying.

OR

- There is a fee agreed with the losing agency to cover the cost of planning the activity over the 3-month notice period and to compensate them for the loss of buying. If it is agreed and paid, then the business can move immediately.

CONCLUSION

A successful pitch process takes time and effort for all those involved. For clients it should also be an exciting and rewarding time. Yet this can only happen when there is a strong client/agency relationship established that sees beyond what the next campaign might be and looks to the future growth of the business and development of the brand in the years ahead.



APPENDIX 1 - Sample Score Card

Section	Criteria	Maximum Marks Available	Minimum Qualifying Threshold
A	Quality and extent of research and informed understanding of the defined target audiences and their media behaviour.	150	90
B	Quality of the defined media strategy for the briefed campaign which shows a clear evidence of the research insights being distilled into a coherent media strategy.	150	90
C	Quality of the accompanying media plan laydown / overview with clear demonstration of the breakdown of media spend, activity timing and role of each channel as it relates to the Media Strategy in Section B.	100	60
D	KPI delivery and reporting - Quality of the campaign measurement approach which clearly demonstrates how the agency will measure the success of the campaign, against the set KPI's.	150	90
E	Quality of the technology, tools and techniques that will be used in aiding the client to deliver on their objectives across all aspects of the business. This includes technology, tools and techniques being used across all levels of the agency from media strategy, planning, activation and optimisation through to reporting.	100	60
F	Account Resources - Quality and balance of the team proposed to manage the business at all levels from senior team leadership through to account management and buying.	150	90
G	Cost - Agency Fee and overall commercial proposal (fee, PRF, savings, media cost template).	200	120
	Total	1,000	600

APPENDIX 2 - Award Criteria Methodology

% Mark	Award Criteria Methodology
0%	Response fails to address the criteria outlined
1 - 20%	A response where there are a number of significant flaws, lacking in clear detail and a number of areas do not give any real clarity on how it will deliver on the objectives outlined
21 - 40%	A response where there are a number of concerns on the quality of response. This may include a lack of detail, or clarity on the objective, or where there is no clear links between the sections of the response.
41 - 60%	A response which delivers some detail and clarity on the approach undertaken and delivers the requirements outlined at a reasonable level. There are some challenges around some of the response criteria, which prevents it from achieving a higher mark
61 - 80%	A response that demonstrates a very clear understanding of the requirements of the brief and demonstrates how the agency would answer this brief across all criteria
81 - 100%	A response of such a quality that is deemed to have no weaknesses with all criteria being met at close to full marks. All the detail supplied is comprehensive with a clear flow through all the award criteria.

The background of the image is a dark, almost black, space filled with vibrant, glowing blue lines. These lines are fluid and organic, resembling smoke or liquid light. They flow from the top left towards the bottom right, with some lines curving and overlapping others. The intensity of the blue varies, with some lines appearing as bright, sharp streaks and others as softer, more diffuse washes of color. The overall effect is one of dynamic movement and energy.

For any queries, please contact charley@iapi.com