

PITCH FORWARD

A better pitching process for the comms industry

Many thanks to

**MUCK
RACK**

**BEST
PRACTICE**
A *FRESH* approach

PRINCIPLES OF BEST PRACTICE

The new business pitch process is fundamental to the health of the public relations industry. Through pitches, new business relationships are forged and existing ones renewed. It is in the interest of clients and agencies alike that the process is conducted as effectively as possible.

During the last six months, PRCA as the industry's trade body has conducted detailed research with agencies and clients alike.

We've found that successful and effective processes share some common principles: all participants have a fair chance of winning, they are the result of realistic decisions made in the client organisation, they are conducted ethically, and there is a structured process with a healthy conclusion. We set these out in more detail below.

We encourage everyone buying PR services to subscribe to these principles and support a FRESH approach to the pitching process.

BEFORE WORK STARTS – IS A PITCH THE RIGHT WAY TO GO?

Before starting a pitch process, the client should consider whether one is needed. If you are just looking to explore the potential of PR services to your organisation, or do not have clear objectives or an agreed budget, a more informal series of conversations will be more appropriate. PRCA can support this exploratory work.

Similarly, a client needing to 'sense check' their agency's performance should avoid running a full competitive process.

DESIGNING THE PROCESS – A FRESH APPROACH

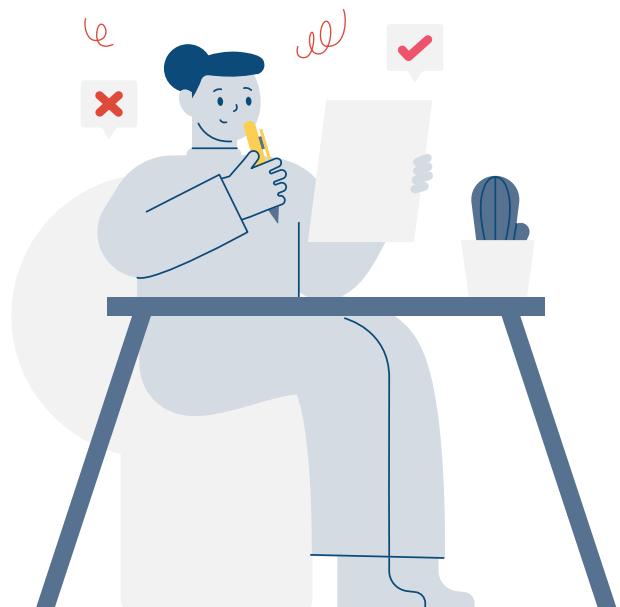
Pitching procedures should be Fair, Realistic, Ethical and Structured, with a Healthy conclusion (FRESH).

FAIR

The purpose of the process is to find the right match between client and agency, and to reduce the risks (on both sides) of an incorrect hire. Taking part in pitch processes is expensive, for the client and for participating agencies alike. Everyone invited to pitch must have a reasonable chance of winning the work. For example, a client that intends to hire an agency based in a particular location should involve only agencies that qualify. An incumbent agency should be included only if it has an equal chance of success as any other agency. Clients should never invite non-realistic agencies to participate out of politeness or as a courtesy. If it becomes clear that a participant cannot win the work (or they no longer wish to be involved) then the opposite party should be informed and the agency should withdraw or be withdrawn from the process. No more than three agencies will be included in the final pitch stage.

REALISTIC

The pitch documentation must be realistic about the work that is being made available. The budget should be agreed within the hiring organisation before the brief is circulated, and it must be stated clearly. This enables agencies to compete on an equal understanding of the client's expectations, and means that, once the successful agency has been appointed, work can begin in a timely way. All competing agencies receive the information at the same time and have equal time to respond to each stage.



Where a client is open to their brief being challenged, they will say so.

Candidate agencies will undertake work to understand clients' objectives, but this should be proportionate to the size and scale of the budget at hand.

The plan for the process must allow adequate time for each stage, including chemistry meetings and tissue meetings if required. Three weeks should be the minimum time provided to agencies to respond to a brief. Clients should allocate time to internally discuss the outcomes from each stage of the process. Adequate time should be provided to allow for constructive feedback to unsuccessful agencies.

ETHICAL

At tissue meetings, presentations and other meetings, the agency will be represented by the people who would be working on the client's account. This will, as far as possible, include junior members of staff. Similarly, the client's attendees will include the key decision makers as well as people who would be working with the agency on a day-to-day basis. Where possible, key meetings will take place face-to-face; where this is not possible then participants will none the less give virtual meetings their full attention.

Creative ideas presented by the agency remain the intellectual property of the agency, and won't be used by the client without specific payment.

Outside the process, representatives of the agency may discuss potential business with their contacts at the client organisation, but once the process is in play, contact between the agency and client will be done solely through the lines of communication agreed and not through other contacts or relationships. Agencies will accept the client's decision and not attempt to use undue pressure to reopen a process that has been undertaken fairly.

Agencies and clients alike will be open about potential red lines: conflicts of interest (eg. other clients who are competitors) or ethical policies required from suppliers. Clients won't seek references from other clients unless the agency has been chosen.

STRUCTURED

Once an organisation has agreed its objectives and budget, the hiring manager must obtain the agreement of relevant internal decision-makers to participate at the right time in the process. These decision-makers may include some or all of: procurement, legal, other marketing disciplines, the budget holder, the managing director or chief executive. Everyone should be clear about their role and commit to take the time – including participation in certain meetings – so that the process will be successful.

Agencies will be provided with the timetable of the process, including dates when they can expect to hear whether they are through to the next round or ultimately successful.

The client will be open about the criteria (eg. value for money) they will use in order to make their decision.

HEALTHY CONCLUSION

Unsuccessful agencies will always be notified. If an agency had made it through to the shortlist, it will always be provided with constructive, meaningful feedback that acknowledges the agency's investment into the process and sets it up for potential future wins elsewhere.

The successful agency's appointment will be followed up in writing as soon as possible so that it can prepare to start work.

Contracts should be written and signed within two weeks of appointment.

FRESH AT A GLANCE

Only run a pitch process if your organisation is agreed that:

- * You have clear objectives;
- * You have an agreed budget;
- * You understand the potential of PR services for your organisation;
- * All the agencies involved will have an equal chance of winning the work.

If the answer is no to any of the above, informal conversations may be more appropriate.

PRCA can help support this work.

Pitching procedures should be **Fair**, **Realistic**, **Ethical** and **Structured**, with a **Healthy conclusion (FRESH)**.

FAIR

- * All agencies have a reasonable chance of winning the work
- * Incumbents included only if they have an equal chance of success
- * No agencies included out of courtesy or to make up the numbers
- * Agencies are informed if, mid-process, it's clear they can't win the work
- * Agencies withdraw if they no longer want the work
- * No more than 3 agencies in the final pitch stage

REALISTIC

- * The client agrees its budget beforehand and makes this, and its willingness for the brief to be challenged, known
- * The work involved to pitch is commensurate with the potential contract
- * Adequate time for agencies to prepare for each stage (3 weeks minimum to respond to a brief)
- * All agencies receive information at the same time and have equal time to respond to each stage
- * Clients build in time to share internal feedback
- * Adequate time is earmarked to provide constructive feedback to unsuccessful agencies

ETHICAL

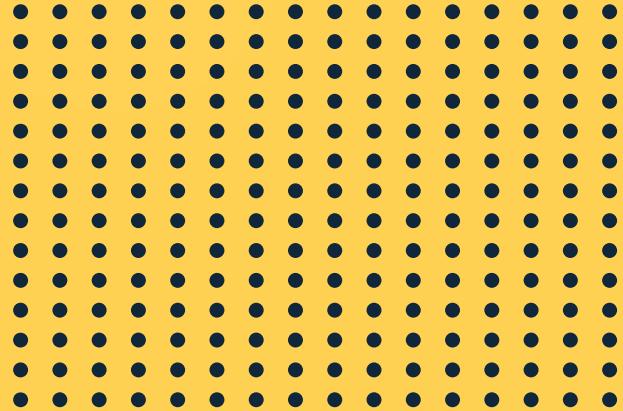
- * Creative ideas presented by an agency remain the agency's intellectual property and won't be used by the client without specific payment
- * The agency is represented in meetings by the people who would be working on the account, including junior members of staff
- * Decision makers at the client attend and take part in meetings
- * Meetings take place face-to-face where possible; all attendees participate fully as appropriate
- * During the process itself, agencies don't use contacts at the client organisation to put pressure on decision-makers; agencies accept the client's decision
- * Agencies and clients are open about potential conflicts of interest or other relevant ethical policies

STRUCTURED

- * Objectives, budget, timetable and the decision-making process (including the involvement of all relevant stakeholders) are all agreed before a client starts the process
- * Everyone understands their role and commits to take the time needed to achieve a successful process
- * Agencies are provided with all key dates, including when they can expect to hear about their progress
- * Clients are open about the criteria being used when making a decision

HEALTHY CONCLUSION

- * No ghosting. Unsuccessful agencies are always notified and clear feedback always given
- * The successful agency's appointment is followed up in writing as soon as possible
- * Contracts should be written and signed within two weeks of appointment so that work can commence



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Muck Rack is the leading provider of award-winning PR software built for how brands and agencies work. The only public relations software powered by intuitive technology and the most accurate, comprehensive data provided by journalists themselves, Muck Rack combines media database, monitoring and reporting for seamless team collaboration, pitching and measurement. Purpose-built for communications and public relations, Muck Rack helps more than 5,000 companies worldwide analyse and report on the impact of their media relations. Thousands of journalists use Muck Rack's free tools to showcase their portfolios, analyse news about any topic and measure the impact of their stories.



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ABOUT PRCA

The Public Relations and Communications Association (PRCA) is the trade association for the public relations, public affairs and communications industry. We provide the space in which our members, from all corners of the world, come together to forge a dynamic, forward-thinking, and influential community. We are committed to advancing the field of PR and championing the vital role it plays in our rapidly evolving world.

We are the heartbeat of an industry that shapes perceptions, drives narratives, and fuels communication on a global scale.

Our commitment:

- * **Building the industry:** we lay the foundation for a robust, innovative, and resilient PR industry through collaboration and collective wisdom.
- * **Speaking up on issues of concern:** we provide a platform for our members to address and champion pressing issues, advocating for ethical and responsible practices.
- * **Understanding industry trends and sharing knowledge:** PRCA offers an environment where industry leaders share knowledge, insights, and expertise to navigate the ever-evolving currents of public relations.
- * **Training PR professionals:** we nurture talent through comprehensive training, equipping both current and future PR professionals with essential skills.
- * **Raising standards:** through its Codes of Conduct, PRCA empowers members to uphold the highest levels of professionalism, integrity, and accountability.
- * **Explaining the power of PR:** we shout about the industry's true potential and showcase its influence in shaping public perception and decisions.
- * **Sharing ideas and collaborating:** in our shared space, creativity flourishes, and collective success is celebrated.
- * **Facilitating discussions:** through discussion, we foster shared solutions to common problems, where diverse perspectives generate innovative solutions.
- * **Providing a platform:** PRCA offers a dedicated platform for members to connect, engage, and network with peers and industry experts.
- * **Showcasing expertise:** we shine a spotlight on outstanding work through events, publications, and thought leadership.
- * **Challenging the industry:** PRCA challenges the industry to grow and evolve, empowering members to succeed in a dynamic PR landscape.

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