

NAME

Pitch guide

AUTHOR/OWNER

Design Business Association

SOURCE

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INTRODUCTION

The pitch guide is a step-by-step methodology for setting up a pitch with designers and includes instructions for briefing designers, a score sheet and a pitch feedback template.

NOTES

Setting Out

Before inviting designers to a pitch you should ensure that you have:

1. Developed a brief for the project you would like the designers to pitch for
2. Selected the designers you want to invite
3. Confirmed the selection criteria for the designers you require
4. Agreed on a few dates that any colleagues that will be judging can attend
5. Agreed what sort of pitch you require

Creative versus Credential pitch

A creative pitch is where you ask a designer to present some ideas at the meeting (i.e. they have to do some creative work before). A credentials pitch is where you ask the designer to show you their existing experience and portfolio. If you need to run a creative pitch then you should expect to pay for it, after all the designers are doing work for you. This can be done by setting a small fee that you are willing to pay and asking the designers to work to it.

If you are setting a creative pitch you will need to be very clear what it is that you are asking them to do. Different approaches and different ideas presented will make the final selection harder because there are likely to be pieces in all the presentations that you like.

Credentials pitches on the other hand still require the designer to think before the meeting but this thinking should be about you and your business needs, not how the challenge can be resolved at the first meeting. Designers will have a portfolio of projects, which they will regularly present to potential clients to get work. The key here is that they will have selected projects or case studies that will be similar to the project you are undertaking to demonstrate their suitability for the task ahead.

The creative pitch is mostly used where you have both the budget and a clear idea of what you need. The credentials pitch is used mostly where you are looking for a designer to work with but where the brief is more open and you feel you would like to explore ideas going forward with one designer only. By reviewing portfolios and meeting the designer you are selecting the designer you feel you would be most comfortable working with.

How Long and How Many?

Usually pitches take place over the period of one day. Each pitch should last from about an hour to an hour and a half with questions. Each pitch ideally should have time between the leaving of one agency and the arrival of the next. This time will be required for you and other judging colleagues to discuss or make notes whilst the pitch is fresh in your minds. It will also be required if the incoming agency needs to set up their presentation, make sure the laptop connection works with the projector etc. If possible it is best for you to go to a separate room for discussion whilst the next agency is setting up and getting used to the room.

The pitch day can be tiring for everyone but it is essential that you collect all the completed feedback sheets at the end of the day. It is very difficult to try and complete these at a later date.

Who should attend?

Balancing the judging panel is always an issue. Ideally, anyone with an interest or stake in the project should be there, but too many on the panel will lead to problems and conflicts with the final selection process. It may also affect the timings of the pitches if too many people want to ask questions.

Regardless of the number attending, there always needs to be a Chairperson for the sessions, someone who can start the process, welcome the agency, manage time as well as being responsible for managing the question and answer session at the end.

Preparing for the Pitch Day

Having identified the designers/agencies you want to see, you will need to invite them to the day you have chosen for the pitch. The earlier you can let a designer/agency know what day you have in mind the more likely the planning will run smoothly. Ideally, you want to avoid changing the arrangements after that. Once you have invited the agencies, you can then follow up with the running order and pitch instruction.

There are no 'rules' around the allocation of a running order. Usually, done on a first come first served basis, each agency should have kept the day free and would pick whatever time slot is available. Confirmation of each agency slot should be sent in writing to avoid any confusion. This should be accompanied by a instruction for the presentation itself.

The pitch instruction is used to ensure that each agency attending is clear what they are expected to present. This will also help the judging panel in their approach to scoring, where they will be able to judge pitches that are closer in content. The instruction can be as short or as long as required. All you are doing is to help the agency prepare for the meeting in a more focussed way and making sure that they have all the information they need to prepare a relevant presentation.

Shortly before the first pitch you want to gather the judging panel together and instruct them to ensure that they are thinking about and scoring the same issues. You could take them through the background of the project, the pitch instruction or what it is that you have asked the agencies to present. You may be using the scoring pitches instruction on page 4 of this document, and you should discuss the process for this as well as the time scale for the decision process and feedback. It maybe that you have arranged a further meeting to discuss the overall pitch and the agencies involved on a separate day, you will therefore need to reiterate how important their scoring is and how useful their completed sheets will be for the follow-up meeting.

Other things to consider before the pitch day are

- Refreshments, for the panel and the agencies
- Do you/ reception know who is coming and when?
- Have you organised the timetable to allow for breaks for the panel?
- Does all the equipment you need work/ do you know how it works? Do you have access to someone who knows?
- Does everyone know where to go? Visitors parking facilities/ maps?
- How will you provide the feedback?

INTRODUCTION

This page can be used when briefing the designers on what you require from them at the pitch meeting.

Client Name

Project

Introduction

This is an introduction to your company, who it is, what it does, where it operates from and how long it has been trading. It should cover the specific part of the business the project is being commissioned from if there is more than one operating division or site. A reference to the website with any particularly relevant pages can be included here.

Background

This section should give an overview of the project, what the objectives are, who is involved, where it has got to and what is needed next. It could include why designers are being brought in at this stage as well as any reference to any other designers that have been or are working on the project currently. This will indicate how the new agency will fit in to the overall mix.

The Presentation

This should inform the designer/agency about the presentation the agency is being invited to give. It will cover details such as time allocated, what is required by the panel such as case studies, a demonstration of previous experience, something about how the agency operates, any thoughts they might have about the project as well as the time for questions.

Who will be attending

Sometimes it is useful to let the invited agencies know who is on the panel. If known the names and titles of the panel can be listed and if the role on the project is unclear then a comment as to how they connect to it.

The Process

Depending on how much you want to reveal, this section can cover a little about the selection process itself, how the agency came to be invited, how many are being invited, a confirmation of the pitch date, when the agency will know the outcome of the pitch and how feedback and questions will be handled.

Contact Details

This should cover any details such as the site address for the pitch, any travel or parking details, where the pitch is to be held internally, contact details for switchboard or a colleague (just in case your mobile is off during a pitch), the pitch organisers contact details and the suggested route for any questions.

INTRODUCTION

The following 2 pages can be used when scoring the pitches delivered by the designers at the pitch meeting.

Client Name

Project

Company

Representative

Date

| | Comments | Score |
|--|----------|-------|
| Demonstration of design capability | | |
| Pitch Team Attending (Are they the people you will be working with?) | | |
| Case Study One | | |
| Case Study Two | | |
| Case Study Three | | |
| Relevance of case studies | | |
| Other work examples | | |

| | | |
|--|--|--|
| Design Process | | |
| Approach to project | | |
| Agency question/s | | |
| Similar clients | | |
| Chemistry (Do you feel you could work with them?) | | |
| Questions? | | |
| Comments | | |
| Notes/ Feedback | | |
| Final Score | | |

Notes on Use

This score sheet is an example of the sort of scoring sheet that has proved useful, especially where a pitch team is seeing a lot of agencies on one day. However, as it is only a guide you should not hesitate to change it to better suit your pitch brief.

The scoring system is up to you. You can apply a weighting score if there are some elements that are more important than others.

Ideally, the sheets should be completed at the end of each pitch. It is quite difficult to go back and remember who said what after a whole day of listening to different designers talk about their work and how they will approach the project.

When briefing the pitch panel, they will need to bear in mind that you will be giving feedback to the unsuccessful agencies and will require as much detail as they can provide for each pitch to allow you to do this.

INTRODUCTION

This page can be used when providing feedback to designers that were not selected for the project.

Introduction to the pitch/ proposal process

Give a bit of background as to how the pitch process went, how they got to be invited to the pitch itself, how many agencies attended, who won (if allowed to communicate). Confirm what you were looking for and how you have satisfied the need that was communicated.

How they did

Give an overview as to the pitch teams view of their performance, how they did compared to the group, where they came (if an order established) what their scores were (if you are prepared to share them), what the judging team liked, where they thought they were not as strong as the winner

Positive Points

List any positive points or areas that they were strong on or scored well

Negative Points

List any negative points or areas that they were weaker on or were scored down on

Individual Comments

*Feedback any direct quotes or comments from the judging panel
Any further steps or what happens next*

Thank you for taking part....
