

A design buyers guide: Credentials pitch –v– creative (free) pitch

Credentials

Credentials Pitch

Has this company got a track record of:

1. Working successfully within my sector? and/or
2. Have they worked on similar projects (in any sector) successfully?

This approach gives you good practical evidence of relevant capabilities and expertise

Creative Pitch

Short outline of work done for other clients – usually focused on blue chip clients and household names

This will not give you any kind of deep insight into the role the agency played or the difference they made

Capability

Credentials Pitch

What are the agency's processes?
How have they codified what they do and how they do it?
What is their creative process; their planning process; and strategic, insight and research process?
How will to apply these processes to the work I need them to do?
How will they manage shocks to these?

This gives you a depth of insight into how your project will be handled and how they are able to repeat with you the successes they have outlined above.

Creative Pitch

n/a

You have no way of judging whether any work they have done is a result of luck or judgment

Creative

Credentials Pitch

Does the company have a 'house-style'?
Is this suitable for my brand?
If there is no clear house style have they demonstrated a suitable breadth of creative to indicate they would be able to transfer their creative skills to my brand?

This gives you a good measure of whether the agency is suitable for your kind of work

Creative Pitch

Do I think the creative the agency has done on my brief will work?
Do I like what I see?
Am I excited and engaged by the creative?
Do my colleagues agree?

Whilst you have something tangible you can use to show colleagues and judge the different work it will be creative based on a shallow understanding of you and your market. From a client perspective this element of the creative pitch is commercially toxic (see why below)

Chemistry

Credentials Pitch

Do the people I have met get on and can I get on with these people.

1. Is there a natural affinity between the team who are presenting?

and

2. Between my team and them?

One of the key aspects of the client/designer relationship is partnership, ascertaining that you will get on with the creative team is vital (and often overlooked)

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Cost

Credentials Pitch

Are the outline costs (daily rates) and indicative timelines going to work for my budget?

Combined with the information you gleaned as part of 'Capability' and perhaps also an outline project plan, this gives you the info you need to judge as to whether this agency is a good fit for you in regard to your budget

Creative Pitch

Does the detailed estimate fit with our budget?

A detailed estimate pulled together as part of a pitch is dangerous. The estimate will be likely to be full of inaccuracies as it is based on only a shallow understanding of you and the work required. It is also likely to attract various inducements and 'loss-leaders' aimed at attracting the decision to be made in favour of the agency

Explaining the credentials pitch –v– creative (free) pitch guide



The guide and explanation has been written for the DBA by Tom Foulkes, marketing director of Carter Jonas. He has been a long-standing, and outspoken, critic of the speculative / free pitching approach to choosing a design agency.

Tom has won several DBA Design Effectiveness Awards as a client and while he was Head of Marketing for Land Securities in 2007 he was named Design Week's Client of the Year.

To be effective, relationships with agencies should be built for the long term. We need to be sure that the partnership will work and not just for us as the client but also for the agency.

We focus on five key areas to help us make this judgment - The Five C's:

- **Credentials**
- **Capability**
- **Creative**
- **Chemistry**
- **Cost**

We look to gather hard evidence across these five areas. The way we gather this hard evidence is through a Credentials Pitch. Essentially this boils down to a series of meetings with a small number of (usually no more than five) suppliers. None of these meetings require any of the agencies to produce any original creative.

This differs to what is sometimes considered the traditional methodology for selecting a new design partner, which unfortunately more commonly sees clients ask suppliers to produce creative work as evidence of their ability to undertake the work; the Creative Pitch as it has become known. We believe this method leads to poor decisions and may undermine the commercial strength of our organisation.

Fundamentally, we believe the creative pitch is commercially toxic and is a tradition the marketing profession can do without. Commercially toxic may sound a little over the top but here are some of the potential hidden consequences of the creative pitch that can have a negative impact on a business, post decision:

- **The creative will be naïve and hastily pulled together.** It will be based on a very narrow understanding of you, your market and the true nature of what is required. Creative like this is dangerous to share within a business as it can lead to commercial decisions being made on the basis of taste rather than commercial sense. This ultimately may lead to your own commercial failure
- **It isn't free creative,** the cost of producing this work will be recovered through the subsequent work, the agency will likely resent giving their work away for free and this dysfunction will undermine and ultimately destroy your commercial partnership. A failure in such a vital strategic relationship may lead to your own commercial failure
- **The quality of any creative produced will only reflect the amount of time the agency has spent on the pitch.** In any successful agency this will not be a great amount of time, unless the agency is struggling to win work. This will lead to poor decision making as it is likely that you appoint a poor agency with lots of time to spend on your pitch over the strongest agency who was busy with fee-paying work in the lead up to the pitch. Ultimately this will affect your competitiveness and may lead to your own commercial failure

Selecting and appointing a new design partner is one of the most important elements of what we do. Get it right by using the DBA's free Client Guides on Commissioning Design at www.dba.org.uk

Example letter in response to a free pitch request

Dear <<Client name>>

Thank you for the opportunity/meeting/brief.

We would love to work with you and your team and feel we could bring a lot to this project. However, we believe that the process you are going through to choose an agency will not enable you to find the best agency for this job, nor will it benefit the agencies on the short list. For this reason we believe that it would not be appropriate for us to progress to the next stage.

As members of the Design Business Association, the representative body for the UK design industry, we have agreed to not participate in pitches requiring the production of free creative work. These are known as 'free pitches', 'speculative pitches' or 'creative pitches' and it is a commonly held view that they are not a good way to choose an agency.

At the risk of seeming presumptuous I thought it might be appropriate to summarise our thoughts as to how you might best structure your approach for selecting an agency, with whom to work in partnership on the development of <<name of project>>.

Design agencies design. It is what they do, and what you pay your money for. Having a competition in a pitch situation to see who can deliver the best design idea in order to win the job of doing the design is nonsensical.

Firstly, as it is unpaid, agencies give the brief as much attention as they can once their paid work is done. The agency without many clients can afford to spend much more time developing their pitch idea. So their pitch design work might be better than the others, but that does not mean that the others could not do far better given the time and consideration they would get if they were taken on. Also, how would you feel if your agency was spending time they should be working on your project trying to win other free pitches?

Secondly, good design work takes collaboration with the client. How can an agency even start to work on a brief without a full understanding of the client, their culture and requirements?

As you know, we have completed many successful <<type of project>> development projects in the last few years. In all these cases we would never have achieved the successes unless we had spent time with the client developing the strategy and concept first. These case studies illustrate our ability to work successfully with our clients to find the right solution. Assessing an agency on their credentials is the only way to ensure you end up with the right agency for you.

I have enclosed a handy guide produced by the DBA to help design buyers choose an agency by their credentials. The DBA also has guides on writing briefs and managing the whole process. They are available for free at www.dba.org.uk

In light of the above, I do hope that you might re-consider your approach. Even if we are not your final choice of agency it will mean that you have gone through a rigorous process finding the right agency for you, rather than a pot-luck beauty parade.

Kind regards
<<Your name>>