

The preferred tender and pitch process

A draft set of guidelines for tenders and pitches in the communication industry has been developed in consultation with Public Relations consultancies, pitch agencies and the Public Relations Chapter of PRISA. Currently being circulated in the industry for comment, they aim to ensure that clients and consultancies follow fair and equitable process offering enough information and fair timing for both parties.

 By [Nicola Nel](#) 14 Oct 2014

Tenders and pitches are an integral part of our lives in the communication industry. The art of winning the right accounts is crucial to the growth of any consultancy.

But we all know how much hard work and energy go into tendering and pitching for new business - so knowing how and when to pitch is an important element of building a business and winning quality accounts. And understanding and helping drive the adoption of the new guidelines across the industry should see the entire process streamlined and simplified!

When to pitch

Even before thinking of pitching, a consultancy should consider whether they want to participate in a particular Request for Proposal (RFP). Ask yourself whether you can handle the extra workload, both during the pitch process and after. And ensure that you have the right information from the prospective client.

Have they provided you with clear objectives and an annual budget? Do push back if the prospective client does not want to share this information or give them an indication of your average fee and what they can expect for their investment in return. A lot of non-recoupable hours could potentially be wasted on researching and presenting your ideas if you do not have a clear idea of the prospective client's selection criteria.

How to pitch

I am a firm believer that clients like doing business with people they like. It all starts with the chemistry between the client and consultancy which is the first step to a successful client/consultancy relationship.

Are you, as the consultancy, interested in and excited about the prospect of working with this client? Do you feel the client understands your role as their prospective public relations partner and the value you can bring to the corporate communication role or marketing mix? Do you as the client feel that the consultancy understands your business and your communication needs? Chemistry goes both ways and it should be a win-win situation for both parties.

How the guidelines will help the process

PRISA's proposed guidelines set out that the first round of a pitch should involve credentials only, and from a maximum of five to six consultancies; the second round should involve the best three companies giving insights - either via case studies or desktop research - and the last round should show some strategic direction with top-line creative ideas from the final two selected consultancies.

If these guidelines are accepted by all in the industry this would go a long way towards ensuring that all consultancies - big and small - are treated in the same fair manner. If adopted, we can hopefully say goodbye to pitches which require upwards of ten consultancies to develop full-blown public relations strategies and creative ideas. A huge waste of intellectual time for at least nine of these consultancies!

However, these are only guidelines and not enforceable. In my view, it is critical that the industry comes together and agrees to share only insights at pitch stage, rather than full strategies, ideas and costings. This will save us from the ongoing issue of how to protect our intellectual capital, for this is what the new proposed Code of Conduct that governs Tenders and

Pitches sets out to do. It creates an accepted industry standard on pitching that is both fair to the client and the consultant.

Some further tips

- Consultancies: Google the key decision makers/clients beforehand; for inspiration, have a look at some local and international case studies which focuses on the prospective client's industry - there are loads of these online. Visit the client's store, use their product, call their call centre, have a look at their FB/Twitter presence. Be knowledgeable and curious, and be interested and passionate about the prospective business!
- Clients: Ask for client referrals, three recent happy clients and three resigned clients - and why. Ask to meet the team who will work on your business. Relevant industry experience is important, but smaller consultancies often lack the case studies, but are more nimble and creative so relevant experience should be but one of the measures. Share your selection criteria with the consultancies so that they are aware how they will be scored in the pitch process. Give consultancies a timeline and give feedback to both the successful and unsuccessful ones.

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