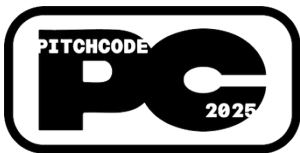


# Pitchcode 2025

*Effective client-agency relationships start with the right agency selection*



*De Pitchcode 2025 is onderschreven door:*



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# Introduction to the Pitchcode 2025

## **The goal: to pursue sustainable relationships**

Good client-agency relationships lead to better work and have a positive impact on business outcomes for all those involved in the partnership. And a good selection process usually proves to be an excellent predictor of a good relationship; project-based or long-term. This document provides some tools to shape the selection process in a way that maximises the chances of success for both parties. In this document, we call this selection process a 'pitch', but the principles apply to all types of agency selections (e.g. an RFP or trial engagement).

*Because of the specific 'rules of the game' that apply to a government tender or (public) procurement, these are outside the scope of this document. It is advisable for parties bound by the law relating to public procurement to consider the principles below as much as possible in such processes as well, and to follow the pitchcode within the rules permitted/prescribed by law.*

If a new agency is sought from the client, an extensive selection process (a pitch) to choose an agency is not always the best solution. The choice for a new partnership can also be made based on a simple agency presentation, a chemistry meeting, or based on the work the agencies have already realised for other clients (showreel, credentials, etc). For simple assignments, a price quote may suffice.

However, if an extensive agency selection is chosen, it is advisable to frame the pitch according to the aspects covered in this document, in order to increase the chances of a lasting relationship for all parties involved.

## The starting point

### Transparent, responsible, fair

**Transparent:** clients and agencies commit to providing access to all necessary information at each stage of the pitch or tender to ensure equal treatment of all parties.

However, the client will not share agency-specific information with third parties (e.g. agencies participating in the same pitch).

**Responsible:** clients and agencies consider the implications and costs involved in this process.

**Fair:** clients and agencies commit to conducting the tender in a fair manner.

### Recommendations by bvA, VIA, BNO, IDEA, DDA, DDMA and PMA

When organising a comprehensive agency selection process, it works best for all parties to follow a careful procedure in which all parties involved can agree. bvA, VIA, BNO, IDEA, DDA, DDMA and PMA provide the recommendations for this in this pitchcode. These recommendations save time and money for clients and agencies while enabling the best results.

The Pitchcode 2025 was created on the initiative of FONK magazine and endorsed from the pitch supervisors' side by 3MO.

# The Pitchcode

## Introduction

Organising a selection, whether for a long-term relationship or a project, takes a lot of time and energy both for clients and agencies. Therefore, the client makes a longlist based on credentials and references. The client reduces the longlist after a chemistry round to a shortlist of up to 3 agencies for the final selection, inviting only agencies that have a real chance of being selected. A careful selection of 3 agencies provides sufficient choice and avoids unnecessary work on agency and client side. With more than 3 agencies, the 'chance of winning' per agency becomes too small.

If an extensive agency selection is chosen, it is important that the assignment of the pitch is proportional to the potential agency income and the estimated payback time of the pitch. See also below under the heading Pitch fee.

## The Pitch Canvas

For the final selection, we have prepared a 'Pitch Canvas', which helps make the key choices around the pitch transparent.

The canvas consists of two halves:

Part 1, *The Engagement*, answers for the client the question, "what do I have to offer and what am I looking for?" and for the agency, "what can I gain and what do I have to do to achieve it?"

Part 2, *The Selection Process*, answers for the client the question, "what do I need to come to a choice?" and for the agency, "what do I need to do to get the contract?"

The Assignment			The Selection Process	
Client: What do I have to offer and what am I looking for? Agency: What can I gain and what do I have to do to achieve it?			Client: What do I need to come to a choice? Agency: What do I need to do to get the contract?	
Key Challenges	Scope of Work	Briefing	Activities and Deliverables	Criteria and Assessment
	Stakeholders		Planning and Timing	
Agency Income			Pitch Fee	

# **Part 1. The Assignment**

## **Scope of work**

A description of the scope of business (type of work, duration, etc.) if the agency wins the pitch.

## **Stakeholders**

Appointment of the key people involved in the selection process and the final assignment on the client and agency side:

- The person responsible for the pitch.
- The set-up of the organisation (or team) within which the assignment will eventually be carried out.
- Decision-makers and ideally confirmation of their attendance at the various meetings.
- Any consultants guiding the process and their responsibility in the process.

## **Agency income**

An indication of the level of agency income if the agency wins the pitch.

## **Key challenges**

The main challenges at the client, for which the agency is asked to help think of possible solutions.

## **Briefing**

Clients give agencies selected in the shortlist a clear and complete briefing. The briefing includes at least:

- Extensive background information on client, its brand(s) and key challenges.
- Market and research data and other relevant project information.
- Target group information.
- A clear, preferably quantitative, description of the business, marketing, communication and other objectives of the pitch brief. This includes social objectives, desired behavioural change, et cetera.
- The concrete brief for the pitch, e.g. strategic recommendation, creative (design) proposals, elaborated content plan, distribution approach, digital strategy, media strategy, technological architecture, et cetera.
- The desired deliverables.

## **Part 2. The selection process**

### **Activities and deliverables**

The different phases of the process and the deliverables for each phase. Also, the number of participating agencies per phase of the process.

### **Planning and timeline**

Detailed planning of the selection process (from initial briefing to final selection) and insight into the planning of the assignment to be carried out, in relation to the scope above.

### **Criteria and assessment**

Participating agencies will be informed in advance how they will be assessed:

- Criteria related to the pitch proposal.
- Any other criteria, e.g. connection with the team, capabilities on strategy, creation or account, application of AI, experience in specific domain.
- Other information requested as part of the selection process, e.g. agency information, pricing information, or a way of working proposal.

### **Pitch fee**

Agencies invest a lot of time and resources in a selection. A pitch fee that at least covers out-of-pocket costs and possibly a predetermined number of hours spent is therefore always appropriate. The amount of the total pitch fee should be clear in advance and, depending on the scope of the pitch, considered realistic by both client and agency.

In the unlikely event that the pitch is stopped, or if the assignment is not awarded to one of the participants, the pitch fee will be paid according to the agreements made.

## **Part 3. General conditions**

In addition to the elements from the pitch canvas, there are several general conditions, which contribute to a transparent, responsible and fair pitch process.

### **Taking responsibility**

Agencies and clients undertake to work together responsibly in the pitch process, considering the implications and costs involved. This includes:

- Compliance with the agreements described in the pitch approach.
- Clients considering the implications and the costs involved in this process.
- Agreements, process steps and assignment are not changed during the process.
- Clients and agencies shall observe confidentiality of the selection process and of the communication that takes place between client and participating agencies.

### **Offering transparency**

- Clients provide as much relevant information and offer space for questions.
- Agencies provide insight into the composition of the team that will be responsible for executing the assignment if the agency is selected.
- All contact moments with the agencies are in-person as much as possible.
- Clients give transparent and honest feedback to the unselected agencies.

### **Fairplay**

Agencies and clients commit to conducting the pitch in a fair manner. This includes:

- Clients and agencies commit to a fair pitch process and transparent decision-making framework.
- Clients give a fair indication of the size of the potential agency income.
- Agencies give explicit, clear and realistic budgets.
- A walkthrough of the full process, or the obligation to provide clear and written justification in case of withdrawal.
- The prohibition of mutual agreements with the other agencies responding to the pitch and compliance with competition law.
- The development of a proposal that is realistic in relation to the proposed budgets.
- Respect among all parties involved for the decision-making process as presented in the pitch document.



## **Intellectual property and confidentiality**

- Agencies respect the intellectual property of the information and documents provided by the client in the context of the tender.
- Agencies commit to treat this information with the utmost discretion. For this purpose, a non-disclosure agreement will be drawn up that agencies (and any external pitch consultants) will sign.
- All recommendations and material produced for selection are confidential and remain the property of the participating agencies, even if a pitch fee is paid. If the client still wants to use the material, this should be redeemed.
- The winning agency's intellectual property can be transferred or licensed to the client if this is contractually agreed. Depending on the type of assignment, there should be a reasonable fee in return.
- The confidential information provided by clients and agencies linked to the selection process cannot be used by either party outside the context of the selection process.
- Agencies may deposit their proposals with the Benelux Office for Intellectual Property.

## **The role of the pitch supervisor**

Appointing a pitch supervisor can unburden the client and keep the process on track for all parties. In doing so, it is important that the pitch supervisor is independent, does not wear a 'double hat' and has no self-interest in a particular outcome. The role of a pitch supervisor includes:

- Advice regarding a professional and fair pitch process and a transparent decision-making framework.
- Progress and monitoring of the process and compliance with agreements made.
- Advice for longlist based on the client's selection criteria.
- Support in drawing up a briefing.
- Support in drawing up an evaluation criterion and giving honest and clear feedback to agencies.
- Central contact person for client and agencies.
- Support in making, implementing and comparing fee agreements.
- Facilitate agencies to show the best of themselves.
- Independent: supervisor and advisor, not a (co-)decision-maker.
- Overall coordination of the pitch.



*De Pitchcode 2025 is een initiatief van:*

**FONX**

*De Pitchcode 2025 is onderschreven door:*

**3m●**