



# CHARTER FOR AGENCY PITCHES

RECOMMENDATIONS FOR A TRANSPARENT,  
RESPONSIBLE AND FAIR PROCEDURE



Taking brands further



## A TRANSPARENT, RESPONSIBLE AND FAIR PROCEDURE

The key role of any agency, regardless of the disciplines in which it operates, is to design successful strategies and plans for brands. A long-term partnership between client and agency remains the best way to achieve excellent results. Strengthening existing relationships is often more successful than starting a new relationship.

An extensive pitch process to choose an agency is not always the best solution. A choice can also be made based on credentials presentations or on projects delivered by the agencies for other clients. In case of simple assignments, an agency can draw up a price offer with minimum research or conceptual input.

**Tenders must be transparent, responsible and fair:**

**Transparent:** clients and agencies commit to providing each other, at any stage of the tender procedure, with access to all information necessary to ensure that all parties are treated equally;

**Responsible:** clients and agencies participate in the tender process responsibly, considering the implications and the costs that this process entails for both parties;

**Fair:** clients and agencies commit to ensuring the tendering process is conducted fairly.

When organising an extensive pitch, it is best for all parties to follow an appropriate procedure. UBA, ACC, and UMA wrote recommendations, in order to guide both parties. These recommendations save clients and agencies time and money while allowing the best results to be achieved. The guidelines are simple, logical and formulated in such a way that they benefit all parties.

An agency pitch procedure must mark the beginning of a fruitful relationship between the client and the selected agency. This is key to achieving an excellent partnership together and strengthening the brand's reputation.



## BASIC RULES FOR CLIENTS

### 1. The number of agencies

Organising a pitch procedure, whether it's for a long-term relationship or an ad-hoc project, takes a lot of time and energy both for the client and for the agencies that are contacted.

There are three rules of thumb:

- If the potential income for the selected agency is less than €25,000 per year (€50,000 per year for a media agency), in principle a chemistry meeting and agency credentials will suffice to choose the right agency.
- When the income for the agency is higher than €25,000 per year (€50,000 per year for a media agency), the client makes a long list based on credentials and references. The client reduces the long list to a short list of no more than 3 agencies (possibly 4 if the current agency is also invited) for the final selection.
- Only agencies with a real chance of being selected will be invited.

### 2. The briefing

Clients give short-listed agencies a clear and complete briefing. The briefing contains among other things:

- extensive background information, including information about the client and its brand(s), and market and research data;
- the precise purpose of the tenders: strategic recommendation, conceptual proposals, elaborated content plan, distribution approach, media strategy, etc.;
- a description of the services to be provided;
- the extent of the services to be provided;
- the available budget;
- the number of agencies consulted;
- the names of the agencies consulted;
- detailed planning of the pitch process (from briefing to final selection);
- requested work in the pitch process;
- reimbursement of expenses in the event of non-selection;
- identification of the person responsible for the tenders;
- identification of the decision-maker(s) and, ideally, confirmation of their presence at the various meetings;
- identification of the external consultants who supervise the process and their responsibility in the process.

There must be a true commitment to the communicated budget.

Well-founded strategic advice and strong conceptual recommendations are often based on relevant market and research data. The quality of the information provided in the briefing often determines the quality of the recommendations. The agencies undertake to treat this information with the utmost discretion. To this end, a non-disclosure agreement can be drawn up, which the agencies and external consultants will sign.

The questions asked by the clients in relation to the tender are shared with all participating parties, with the exception of questions relating to individual strategic recommendations.

### 3. The timing

Sufficient time must be allowed between the briefing and the presentation. The recommended time varies depending on whether it is a strategic-conceptual recommendation for a long-term relationship or an ad-hoc assignment.

- In the case of the selection of an integrated or advertising agency, 4 weeks are required for a strategic recommendation plus 4 weeks for a conceptual/creative proposal;
- In the case of the selection of a media agency, 4 weeks are required for a strategic recommendation plus 4 weeks for a financial and tactical exercise;
- In the case of the selection of a content, event, PR, and/or influencer marketing agency, 3 weeks are required for a strategic recommendation plus 2 weeks for a detailed proposal for different channels;
- This period can be shortened if the pitch process is limited to a workshop or a chemistry meeting, for which there is a lesser amount of preparation required (where no explicit strategic recommendation or conceptual/creative proposal is requested).

### 4. Reimbursement of expenses

The agencies also invest a lot of time and resources in a pitch procedure. It is therefore appropriate to grant financial compensation to the agencies that were not selected (with the exception of the outgoing agency). The amount of this fee must be clear in advance for all invited agencies.

Experience shows that pitches for which you, as the client, call on a specialised, external consultant and for which the participating agencies are reimbursed are often better prepared and also produce better results. An agency that is reimbursed – even partially – for the time invested and the costs consented in hiring experts, feels recognised and respected and will work with a lot more motivation.

### 5. The assessment

The participating agencies should be informed in advance of how they will be assessed and of the expected services. The goal of the process is to choose a critical partner, not just the choice of a campaign or an executing party.

The client gives a transparent and honest debriefing to the non-selected agencies on the various selection criteria. This is instructive for both parties.

### 6. The copyrights

All recommendations and material produced for the selection are confidential and remain the property of the participating agencies. The information provided by the agencies is linked to the ongoing pitch process and cannot be used by any of the parties outside the framework of this pitch process.

The agencies can file their proposals with the Benelux Office for Intellectual Property.

After the pitch, the copyrights will be laid down in a contract between the client and the selected agency. All mutually provided information will remain strictly confidential for all strategic and creative material, both during and after the pitch.

## BASIC RULES FOR AGENCIES

### 1. Transparent

The agencies commit to providing clients with access to all the information necessary to ensure that all parties are treated equally.

This involves, among other things:

- detailed structure of the shareholding, as well as the structure and composition of the group to which the agency belongs;
- exhaustive list of conflicting clients managed within the agency/group based on the indications provided by the client in the tenders;
- business and financial commitments existing with sub-suppliers, media regulators, and technical service providers;
- a clear indication of an agency's contribution to the cases presented;
- identification of the person responsible for handling the tenders;
- to the extent possible: identification of the team that, in case of selection, will be responsible for the execution of the assignment, as well as an indication of whether the team members involved are permanent employees or are employed as freelancers.

### 2. Responsible

The agencies commit to participating responsibly to the tender process, considering the implications and the costs that this process entails.

This involves, among other things:

- compliance with the conditions set out in the tenders;
- compliance with the performance requirements laid down in the tenders (no more, no less, in particular as regards creative material);
- no presentation of a creation already proposed to a competing company during another tender procedure;
- correct estimates for technical conditions of implementation of the proposed projects, considering the necessary time needed by the agency to obtain this information from third parties;
- explicit, clear, and realistic budgets;
- legal correctness and respect for the relevant self-regulatory codes for the proposed projects;
- respect for the confidentiality of the pitch procedure and of the communication between the client and the participating agencies;
- respect for the confidentiality and intellectual property of the information and documents provided by the company/client in connection with the tenders;
- return of the documents provided by the company/client.

### 3. Fair

The agencies commit to ensuring the tendering process is conducted fairly.

This involves among other things:

- a real commitment to the client during the tendering process;
- participation in the entire competition process or the obligation to provide a clear and written justification in the event of withdrawal;
- the prohibition of collusion with the other agencies that respond to the tenders and compliance with competition law and fair-trading practices;
- the development of a genuine proposal consistent with the proposed budgets;
- respect for the decision-making process as presented in the tender dossier.

Public enterprises, bound by the public procurement law, are requested to follow this charter within the contours permitted by the law.

This charter was drawn up by the professional associations UBA, ACC, and UMA  
and endorsed by the consultants fma and PitchPoint.



**Taking brands further**

## UBA

UBA is the Belgian organisation made by brands, made for brands.

The UBA member community currently consists of 332 companies who account for the majority of national media investments. As a result, UBA is a unique platform enabling its members to protect the interests of brands and engage in the exchange of knowledge. Through its extensive range of activities and services, UBA stimulates a creative, innovative and transparent communication ecosystem enabling strong and sustainable brands. In the development of its activities and services, UBA consistently implements four strategic principles: inspire, impact, enable and connect. These principles guarantee a relevant service that makes brand builders stronger.

[www.ubabelgium.be](http://www.ubabelgium.be)



## ACC

The Association of Communication Companies is the umbrella organisation for all creative agencies. Its objective is to unite all communication agencies in their individual interests and their collective ambitions. Its mission is to upgrade, promote, and protect the added value of its members with respect to (future) employees, clients, government authorities, the press, and the general public.

[www.accbelgium.be](http://www.accbelgium.be)



## UMA

The UMA (United Media Agencies) promotes media agencies' expertise, added value and diversity of the services proposed to a wide audience within the communication sector, such as advertisers, media partners, authorities and the general public.

[www.uma.be](http://www.uma.be)

