

## “PITCH PERFECT” GUIDE

### Searching and finding the right PR agency

The big, wide world of tourism communication agencies is almost limitless. They differ in size, subject, orientation, performance spectrum, location and, of course, their corporate culture and philosophy. Anyone who thinks all service providers are the same, with price the only differential, is quite wrong. How agencies perceive themselves, their culture, spectrum of services and how they treat their employees will shape customer attitudes towards them. PR is a wide field. Apart from communication advice and classic media work, modern PR includes relatively new disciplines such as blogger relations and social media.

The service spectrum of agencies in the VDRJ (Association of German Travel Journalists) PR circle often includes marketing communications, for example, cooperation with media and non-traditional partners, event organization and integrated campaigns which reach the target group through varied communication channels.

However you should be cautious before you commit to a new partner. This guide for the VDRJ has been developed in association with experts, and its aim is to assist tourism companies and organizations in their search for agencies.

At the beginning of the search, the seeker should ask the following questions:

- What do I expect from an agency on both a professional and human level?
- What are my goals and requirements? What services should the agency provide?
- What qualities should an agency and its staff bring so that I feel comfortable with them, my workload will be lighter and improved, and they add creativity?
- What is a good communication agency worth?
- Do I want to go through a classic pitch process or do I use other methods such as a workshop?

This is important to us: answering these questions and finding the "perfect" agency is a lengthy and intensive process, for both parties. However it is a worthwhile process. Not only does the company find out which agency suits them best, but the agency can evaluate at an early stage whether they are the right partner to meet the company's needs. This is the only way to achieve a strong partnership and contribute to sustainable (business) success for everyone.

## Two sides, one goal

Before and during the selection process, companies and agencies face different challenges.

### The reality for companies:

- There are countless providers with different areas of expertise – which one suits the company?
- Time allowed for the selection process; brief, pitch preparation etc. is limited.
- Ideas proposed by agencies, and their use of the budget is usually quite vague.
- The search for an agency is a resource intensive process.
- The agencies' offerings are often difficult to compare.

### The reality for agencies:

- The brief and definition of a project is often unspecified, so it is difficult to make an explicit offer.
- Many agencies are invited to pitch which means there is only a small chance of winning.
- The preparation of an offer takes time and binds resources for research, brainstorming and the preparation of the presentation.
- For the pitch, agencies invest a high degree of creative performance and professional know-how, which is often not rewarded / remunerated appropriately.

## Success through workshop or pitch

Decide whether you would like to select an agency through a classic **pitch presentation**, or whether you may get a better result through a **personal workshop** with a couple of agencies. A workshop where everyone (both the company and agency) works together, brainstorming and learning from each other, is often more effective than a pitch. This way you can really get to know your future agency.

Using cross media communication, companies can get a real insight into the agency. Consider this when you define your goals and requirements.

### Option A: Classic Pitch

The classic pitch is most suited to companies and organizations which already have experience working with an agency, or have a specific idea of the necessary services and budgets

Ten steps for the perfect pitch:

#### 1. **Analysis of the situation and competitors**

What are the strengths and weaknesses of your company / product compared to the largest competitor and what opportunities and risks do you face? Who are the target groups?

#### 2. **Overall aim**

What (measurable) goals should be achieved by the agency?

3. **Specification of services**

What PR / marketing support does the company specifically need?

4. **Budget planning**

Which budget is available for agency work?

5. **The agency**

Which type of agency is the ideal fit? Young/hip vs. experienced, big vs. small, global vs. regional, specialist vs. full-service?

6. **Tender / briefing**

Summary of communication objectives, indicative budget, timetable and performance description

7. **Meet** with the agencies and **choose** which agencies are to be considered for the pitch.

8. Answer **questions** from the agencies.

9. **Pitch presentation**

10. **Evaluation** based on pre-defined criteria (e.g. professional knowledge, creativity, team expertise) taking into account "soft and hard facts".

### Option B: Reaching the goal through workshop

Instead of a classic pitch, more and more new business consultants recommend using a workshop. This is ideal for companies who are not yet able to provide specific information on the desired tasks, services or the budget. This process allows parties to discuss the tender and collaboration. The company can then establish a clear brief in order to obtain additional offers. If the agency, which took place in the workshop, wins the tender, the workshop fee can be charged accordingly. A workshop also suits companies and organizations who have already selected a small number of agencies through a tender. Together with maybe two other agencies, a creative exchange can be found to establish which agency perfectly suits the company. During this dialogue, the company and the agencies can test whether they are a good fit in terms of work, methodology, product comprehension and not least of all interpersonal chemistry. In addition, initial strategic and creative approaches can be discussed. A further advantage of the workshop option is that the client can use the jointly developed approaches, strategies and, if applicable, arrangements in a future collaboration, be it with this explicit agency who took part on the workshop, with another agency, or in-house / without an agency.

## Practical advice

### The preparation:

- Carry out the call for tenders in a **less labour-intensive period** (for example, in a secondary period). This way, you can ensure that you have sufficient time for the preparation and execution.
- Specify in advance **which employees** are to be included in the process to assist personnel planning. In addition to an internal PR manager and a representative from management, it can be useful to involve marketing and sales.

### The briefing:

- **Take time** to prepare the **brief**. First, present your company highlighting its existing strategic background (actual analysis, competition analysis, target group definition, goal setting and strategy definition).
- Present the **required services**, providing as much detail as possible. Possibly you can engage an agency to support your creation of a service description, which can be used later during the pitch.
- In **budget planning**, specify not only the marketing and communication budget, but also the objectives and timings during the campaign.
- Determine a **fixed schedule** for the selection process. Always provide sufficient time for the agencies to prepare each stage (at least 4 weeks).
- First, request a **written proposal**.
- Determine **what** should be **presented** during the pitch or workshop, how long the presentation should take, who makes the final decision, and which **decision criteria** are being applied.



**Expert opinion by Heiko Burrack:** Predefine a **pitch / workshop fee** that at least covers travel expenses, and pro rata the work of the agency. After all, the conceptual approaches developed by agencies are of great value to the company (ideas, strategic approaches, etc.). In doing so, you also ensure that the agencies are intensively motivated to deal with your needs.

- Define the **type of agent** you want to work with (young/hip vs. experienced, big vs. small, global versus regional, specialist vs. full-service). Ask yourself which values are important to you?
- Explain the brief to the respective agencies in a personal interview and be available for **further questions**.

### The selection process:



**Expert opinion by Heiko Burrack:** First prepare a "**Longlist**" with 8 to 10 agencies who are suitable for the fulfillment your organization's needs. Let the agencies send company profiles in advance. Make an **initial phone call** or visit the selected agencies. This allows you to get a personal picture of your potential partner. Not only is professional expertise essential for the selection of the right agency, but the chemistry. And, if you want to know whether the agency carries and reflects your company's culture and philosophy, make a personal visit. On-site visits are an important factor in the success of companies like Microsoft.



How to find suitable agency candidates: Ask colleagues who have already worked with agencies. Ask journalists and bloggers to share their practical experiences and, of course, agency websites provide a great first impression.

- Use the "Longlist" to make a **small selection of up to three agencies**, who you invite to the pitch presentation. This gives each agency a fair chance of success. Be available if any agencies want to contact you with follow-up questions. The more agencies involved, the longer the process.



**Expert opinion by Heiko Burrack:** Be sure to consider the **copyrights** of the agencies. The rights to the developed ideas, texts, graphics and design remains with the agency. The transfer of rights can be arranged separately with the winning agency.

### Commissioning:

- Prepare **assessment sheets** for the presentation or workshop on which you can evaluate the agencies based on predefined criteria.

- Define a **circle of evaluators**, with each one evaluating individually. After the presentation or workshop, usually the day after, compare and discuss the results.
- Promptly give **constructive feedback** to the agencies that have not been selected. After all, they have committed themselves far beyond the pitch fee and have invested resources.
- Use **sustainability** as a **contractual bond**. Define at least a one-year, usually a two-year, contract term to allow the agency to work as effectively as possible.
- Please note in the **contract** a clear description of the performance, information requirements, remuneration, payment targets, usage rights, notice periods, competition exclusions, liability issues and reference / exclusion terms.

This is important to us: The members of the PR circle of VDRJ specialize in tourism. This does not mean that they limit their expertise to specialist press and travel agencies. Through their daily work, they are familiar with lifestyle, cultural and business subjects and have the appropriate media contacts. In addition, they are familiar with special interest areas ranging from roller coasters to golf or technology.

## Related Links

- <http://www.pr-journal.de/fragen-und-meinungen/autoren-beitraege-themen-der-zeit/17558-neugeschaeft-so-waehlt-microsoft-seine-agenturen-aus.html>
- <https://www.brandeins.de/archiv/2016/richtig-bewerten/pitch-farce-to-farce/>
- <http://www.werbeagentur.de/pitchinformationen>
- <http://www.werbepaxis-aktuell.de/marketing/6-schritte-fuer-ein-erfolgreiches-agentur-pitching-883.html>
- <http://business-nature.de/pitch/>

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The PR Circle of the Association of German Travel Journalists (VDRJ) includes leading tourism PR agencies and press offices of tourism companies and tourism organizations from the German-speaking markets. They all strive for high quality in their field of work in media and public relations, and therefore commit themselves to the [VDRJ code for PR agencies](#).

The following members support this document:
