

# Pitch or Ditch Chart

	Benefit for the Agency Questions	YES/NO/MAYBE/DON'T KNOW/NA	Heavily Weighted	Average Weighted	Low Weighted	Auto Ditch
1	Does the client culture match the agency culture?				x	
2	Does the client match the agency's working philosophy?				x	
3	Is this brand a long-term client with future growth?			x		
4	Is there good short-term revenue potential?			x		
5	Can the agency grow with the brand?			x		
6	Does the agency have any current conflicts (against the potential brand) that cannot be appropriately resolved?		x			x
7	Did the agency come as a referral to the prospective client?	Y/N	x			
8	Does the agency have the bandwidth to pitch properly while maintaining current workload?	Y/N		x		
9	Will the agency's IP be protected?		x			
10	Does the prospective client expect complete ownership of pitch ideas?	Y/N	x			x
11	Is the client familiar with the agency's work or have an affinity for the work?				x	
	<b>Benefit for the Client Questions</b>					
1	Does this brand match the agency's category expertise?	Y/N	x			
2	Does this brand match the agency's consumer/audience expertise?	Y/N	x			
3	Is the client interested in your agency's size?		x			
4	Are you geographically desirable?		x			
5	Does the agency team feel passionate about this brand?	Y/N	x			
6	Do they have a history of being a client that treats agencies like partners?			x		
7	Can the agency do emotive work for this brand?	Y/N		x		
8	Can the agency do innovative work for this brand?	Y/N		x		
9	Has the agency solved similar marketing challenges and/or done relevant sector work for other brands in the recent past?	Y/N		x		
10	Will the agency's senior leadership team be available as the day-to-day team should the account be won?	Y/N	x			
11	Can the agency provide all the necessary disciplines to address the key marketing challenges at hand?	Y/N	x			x
	<b>About the Client Questions</b>					
1	Does the agency know the primary decision maker?	Y/N			x	
3	Has any member of the agency team had a prior bad relationship with the client team?	Y/N		x		
4	Is the CMO or lead decision maker involved in the entire review process?		x			
5	Does the agency have a history with the company or strong connections to any marketing executives and/or board members?	Y/N	x			
7	Is the key decision maker new to the company (less than 2 years)?	Y/N			x	
8	Are there any internal political issues (strong egos/personalities)?				x	x
9	Are there any concerning business issues (bad quarter earnings, declining sales, acquisitions, mergers)?	Y/N	x			
10	Are there any ethical issues that could be complicated and off-putting?	Y/N		x		x
11	Are there other agency partners for this brand that all fall within the same holding company?	Y/N		x		
	<b>About the Process Questions</b>					
1	Is there a search consultant managing the review?	Y/N		x		
2	Is there search consultant known for being organized, unbiased, consultative?	Y/N		x		
3	Has the client shared the budget and potential agency fee?	Y/N	x			
4	Do you know the competitors pitching for the account?	Y/N			x	
5	Is there clear rationale for the review process?	Y/N		x		
6	Will the review process be completed within three months?	Y/N		x		
7	Is there an incumbent?	Y/N			x	
8	Is the incumbent defending the account?			x		
9	Does the client running the review (internally led review) have experience with managing reviews?			x		
10	Does the client have a reputation of frequently changing agency relationships (every 3 years or less)?		x			
11	Is this a mandated review?	Y/N	x			
12	Is this a procurement led review?	Y/N		x		
13	Is the review timeline realistic?	Y/N	x			
14	Is the pitch assignment fair and realistic?			x		
15	Has the agency received any evasive answers from the prospect regarding any preliminary pitch process questions?				x	
16	Can the agency get access to the right people managing the review process for necessary materials, etc.?			x		
17	Will the agency have access to previous consumer research?				x	
18	Do you know the evaluation criteria for agency selection?				x	