



The Mirren Pitch Discovery Call Guide

The Pitch Discovery Call Guide helps you uncover the client's real objectives, get the inside intel on what it will take to win the pitch, and build a personal relationship with the key decision-maker.

Introduction

Most agencies jump at any chance to participate in a competitive review or RFP. However, it's more effective to step back, take control of the conversation, and get some intel about what it's really going to take to win.

The next time you receive an invitation, make some requests of the client. Request more details on the brief, more insight into the process, and a 30-Minute Discovery Call with the client decision-maker.

This guide focuses in on the Discovery Call, which plays a key role in converting the business:

1. Uncover the client's real objectives for the review.
2. Get some inside intel on what it's going to take to win the review.
3. Build a personal relationship with the decision-maker.

Answering the Call

The next time you receive an invitation to pitch, consider this approach:

“Thank you for thinking of us John. This looks like a very interesting opportunity for a great brand. If we decide to proceed, as you would imagine, we'll be investing a tremendous amount of our resources. So we need to be sure there's the potential for a good long-term relationship and we need to be 100% confident we can achieve your objectives. To that end, we require a full and detailed brief, along with a half-hour phone call with you and the other decision-makers. With this, our ability to achieve your objectives and move your business forward, increases tremendously. Let's go ahead and book in a brief call now.”

The key is to position why this is of benefit to the client. As illustrated in the example above, this approach will help you to quickly understand the clients' true objectives and where you can most meaningfully impact their business. Not all clients will agree to the call, but when they do, your odds of winning increase dramatically.

Step One: Focus on the Client's Business & Marketing KPIs

As you prepare to outline your questions, they should be specific to the client's category, with an emphasis on addressing the Key Performance Indicators (KPIs). KPIs are the metrics by which clients measure the performance of their business and marketing.

For example, to name just a few KPIs for retail banking, they would include Products per Customer, Direct Deposit Acquisitions and Average Loan Value. For a grocery retailer, they may include Basket Size, Basket Mix, and Store Traffic.

Note that you should not be asking the client to explain their KPIs, as your team should know this already. Instead, you should be inquiring about how well they're performing against each one. This demonstrates category prowess and the business value of a marketing partnership with your agency.

Step Two: Outline Your Questions.

Customize your questions to reflect the vernacular unique to the client's category. Use the subsequent pages to prepare your questions, which follow a basic framework:



Step Three: Use this Worksheet For Your Next Call.

Be sure to segment your questions as noted above. Begin with Business Objectives and carry the conversation through to the discussion on Why Us? Note that if the call is going well, you may only have time for ten to twelve questions.

The Pitch Discovery Call Guide: Sample Questions

The first step is to outline your questions for this client call. The following are sample questions to guide you. Consider only those that are relevant for each particular client. Customize as necessary.

1. The Business Objectives

Objective: Clients want to work with smart, strategic firms that completely understand their business, and lead them in a smart discussion about their critical business issues.

- What are the top 3 category KPIs?
- What are your top three business objectives right now? Why?
- What are your biggest revenue/sales opportunities?
- What will most hold you back from achieving those objectives?
- Where do you see this business two years from now?
- Where are your competitors succeeding?
- From a business model perspective, what is trending up/down in your category? What is the most significant industry trend you're concerned with?

2. The Marketing Objectives

Objective: This section will begin laying the foundation for your next steps. Focus on digging deeper into the marketing issues the brand faces and offer up insightful comments (from your initial research) on enhancing the client's brand and growth potential.

- What are your top three marketing KPIs?
- What role will marketing/advertising/PR/web/direct play in achieving the business objectives?
- How effective do you think your marketing/advertising is at differentiating your brand? At converting prospects?
- Are your media efforts clearly focused on the right target audience?
- Will we have access to resources such as brand studies, sales data, audience research, etc.?
- What is causing your most recent market share increase/decrease?

3. The Assignment

Objective: Confirm exactly what you will be accountable to deliver against.

- What are the assignment objectives?
- Specifically, how will you measure success?
- Which business and marketing KPIs can we best impact with this assignment?
- What is the budget/timing?

The Pitch Discovery Call Guide: Sample Questions

4. The Pitch

A) Why the Review?

Objective: Beyond what is written in the brief, ascertain why they are looking for a new agency?

- Why are you looking for a new agency?
- In the past, where have your agencies most underperformed?
- What have you most appreciated in your agencies?
- How would you describe your current marketing/advertising/PR/web/direct efforts (i.e., creative, strategy, media, etc.)? Where is it strong? Where is it weak?
- Understand how they think, how they evaluate good work: What campaign (i.e., advertising, PR, interactive, direct, etc.) in the market do you most admire? Why?
- Who are the other agencies? (Ask with authority.) If they don't provide them all: How many?
- Why did you select this particular list of agencies?

B) What are the Agency Characteristics You Value?

Objective: Discover what the client is looking for in an agency for this assignment.

- Specifically, what capabilities are you looking for in an agency?
- Define what you mean (Don't be afraid to ask for clarification, with authority.)
- Discuss their specific decision criteria.
- What disciplines are you looking for?
- Reinforce that you normally bring many of your disciplines to the table.

Note: As items/answers conflict, challenge the client. If they mention "breakthrough creative," challenge them. How do they define "breakthrough creative"?

C) How is the Review Being Conducted?

Objective: Understand what will be expected of you from a day-to-day process perspective.

- Walk us through the steps/timing of the review process.
- Who are the decision-makers at each point in the process?
- How much access will we have to the decision-makers?
- Can we schedule a follow-up call with further questions?

5. Why Us?

Objective: Determine if you are a contender or a seat filler.

- What compelled you to choose us?
- Is there specific work we've created that resonates with you?
- Did you find any of our case studies particularly relevant?
- Did you speak with any of our current or past clients before selecting us?

The Mirren Pitch Discovery Call Guide Worksheet: Outline Your Customized Questions

Client: _____

The Business Objectives and Key KPIs

The Marketing Objectives and Key KPIs

The Assignment

The Pitch – Why the Review?

The Pitch – What are the Agency Characteristics You Value?

The Pitch – How is the Review Being Conducted

Why Us?

The logo for Mirren, featuring the word "mirren" in a lowercase, sans-serif font. The letters are white and set against a dark orange rectangular background.

TRANSFORMATIONAL TRAINING & COACHING TO ACQUIRE & GROW HIGH-MARGIN ACCOUNTS

The Skills to Proactively Lead Clients & Become Strong Strategic Partners – Directly Impacting Organic Growth & New Business.

Mirren provides Account and Pitch Teams with the skills and tools to lean in more assertively with your clients and new business prospects. As the training principles are immediately applied to your day-to-day client work and pitches, our methods begin to impact revenue within 4 weeks.

1

MirrenDirect (Online Training Center)

On-Demand Training, Live Webinar Training, Personal Coaching, Daily Leads, More

2

Industry Leading Conferences

Mirren CEO Summit,
Mirren Live New York,
Strategy Workshops

3

In-Person Training & Coaching

Remote or In-Person, Bring
Mirren to Your Agency for
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