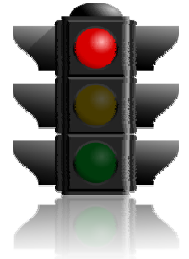



# Agency New Business Readiness Quiz

Rate your agency on a scale from 1 to 10 and see how you're doing.

[ 10 points - You are awesome    5 points – It's tolerable    0 points – Pain zone ]

## *Pre-pre-pitch: Get Ready*



- \_\_\_ My agency knows what it is singularly best at doing and our employees can articulate it.
- \_\_\_ My agency has an established brand with high levels of marketplace awareness.
- \_\_\_ My agency has off the chart, truly outstanding references from current C-suite level clients who will communicate with prospects when asked.
- \_\_\_ My agency website delivers a user experience that communicates our agency brand positioning for our prospects and generates inquiries/leads.
- \_\_\_ My agency knows what new business opportunities to pursue and when to say no thank you.
- \_\_\_ My agency understands the role (and idiosyncrasies) of various search consultants and works effectively with them.
- \_\_\_ My agency has received quality feedback from prior new business pitches when it was not hired (nor advanced very far) and has since corrected any shortcomings.
-  \_\_\_ My agency has high degrees of its organizational “cultural intelligence” and uses it *internally* to engage employees, and *externally* to differentiate its brand.
- \_\_\_ **Subtotal** (80 points possible)

 = *Most important factors that drive success.*

*Pre-pitch: Get Set, proceed with caution*



- My agency evaluates the financial opportunity of any new business solicitation in competitive reviews early in the process so it can make an investment decision on whether to pursue.
- My agency knows that if the client budget is too small to ever pay back the investment it will take to win the business given what is being asked, it will withdraw.
- My agency understands the role of client procurement personnel early in the new business process, the terms & conditions, and their definition of “value”.
- My agency clears potential conflicts early in the review process.
- My agency values its human capital and is highly selective in the opportunities it chooses to pursue when they require the creation of ideas and original work.
- My agency values its intellectual property and clarifies with a prospect that it retains the rights to ideas and work until that time which it is contracted for hire by a client.



- My agency can develop a strategic point of view for any prospective client early in the pitch process by activating our brain trust and resources with great ease.
- My agency sets pride aside and reaches out to partners to present a more competitive set of competencies if the situation requires it.
- My agency anoints a new business team with a collaborative leader and gives it the full resources it needs to compete for new business when the opportunity is right for us.

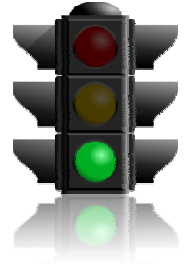


- My agency fully leverages its technical prowess during the new business process to demonstrate to a potential client its abilities and efficiencies in this area.
- My agency has a fresh POV on social media and can engage on the topic in a way that helps a client interpret its meaning and value for their company.
- My agency has done its homework and knows what other agencies are also under consideration.

**Subtotal** (120 points possible)



## Pitch: Go!



- My agency RFIs/RFPs read like Pulitzer prize novels and look like Oprah magazine.
- My agency sponsored visits with prospects show our awesome listening skills with good dialogue across the engaged team.
- My agency teams in front of prospective clients are outstanding, articulate communicators.
- My agency's response to a client problem/strategic brief provides for shorter term action elements as well as longer term visionary thinking about the future of the business/brand.
- My agency treats every output required in the new business process, from conference reports to agendas, as a chance to make a great impression.
- My agency sets up a dedicated intranet site for prospective clients if the opportunity warrants it and the process allows for it.
- My agency actively reviews the financial opportunity, defines the scope of work proposed, and develops an agency staffing plan prior to any final presentations.
- My agency pretests alternative creative concepts as the basis of its recommendation.
- My agency asks questions at every opportunity to learn and engage the client.
- My agency videotapes its final presentations and reviews them internally for improvement before any client-facing presentations that determine selection.
- My agency makes sure the agency principals have quality content in final presentations.
- My agency presents in front of a mock client team who poses questions so the presentation team can practice how to maintain momentum during Q&A.
- My agency presentation team understands the importance of collaborative presenting, integrating content, and always being on when in front of a client.
- My agency understands that the importance of trade channel sell in for any consumer facing work presented, even if not asked for in the assignment.
- My agency is both proud of the work it presents and open to client feedback about how to make it just right for their organization.

**Subtotal** (150 points possible)       **Grand Total** (350 points possible)

[ 315+ Awesome!; 280-314 Solid; 245-279 Average; 210-244 Needs Improvement; 175-209 Help! ]