



## TENDERING CHARTER AGENCY-COMPANY/ADVERTISER

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une initiative :



# IMPLEMENTATION CRITERIA FOR PITCHES

When entering the process, members select the criteria that should apply\*

## 1/ TRANSPARENCY

### THE AGENCY'S COMMITMENTS

- So as to give an accurate overview of its activity, the agency must provide the company/advertiser with the following:
- detailed information about shareholding, structure, ownership and composition of the group it belongs to
  - a complete list of potentially conflicting accounts regarding specific indications given by the company/advertiser
  - capitalistic/business links along with media/advertising networks and/or technical contractors
  - a clear identification of the person in charge of the tender, of the basic structure and profiles (and, if possible, of every member of the team in charge of the budget if they happen to win the contract)

### THE COMPANY/ADVERTISER'S COMMITMENTS

- The scope statement must enable the agency to efficiently respond to the tender. To achieve this, the company/advertiser should:
- give a written, approved and documented brief with the object of the tender and the description of deliverables
  - provide the number of agencies consulted
  - provide the names of the agencies consulted
  - define the scope of work involved in the tender
  - provide a detailed planning of the whole process (from briefing to final decision making)
  - provide budget or estimated price brackets for the pitch
  - provide selection criteria, and evaluation chart
  - clearly identify the person in charge of the tender and the decision-maker(s)
  - mention the potential involvement of outside counsel to analyse offers

## 2/ RESPONSIBILITY

### THE AGENCY'S COMMITMENTS

- observe the rules of competition as mentioned in the scope statement (deadline, budget, scope of the demand...)
- respect the level and amount of deliverables asked for (no more, no less, especially when it comes to the creative material)
- not present any recycled project previously proposed to a competitor of the company/advertiser
- carry out a feasibility assessment before presenting any proposal (legal and/or technical)
- present realistic, clear and explicit budgets
- respect privacy and ownership rights over information/documents
- return all given information/documents

### THE COMPANY/ADVERTISER'S COMMITMENTS

- provide identical conditions to all competitors (simultaneous briefings, deadline, methods of presentation, decision-makers...)
- not have any other agency enter the competition after releasing the tender
- debrief the loser(s) using previously defined selection criteria or evaluation chart
- limit the number of short-listed agencies
- compensate short-listed agencies that lost with a previously defined amount
- take into account the amount of work and the time of the year when setting the deadline
- ask for a limited degree of finalization and a limited number of deliverables

## 3/ SINCERITY

### THE AGENCY'S COMMITMENTS

- wholeheartedly and sincerely engage in the competition
- attend the whole competition process and provide a thorough written explanation in case of withdrawal (unless the tender does not comply with this Charter)
- make an elaborate and sincere proposition in accordance with the budget mentioned in the tender
- respect the decision-making process described in the scope statement

### THE COMPANY/ADVERTISER'S COMMITMENTS

- actually collaborate with the winner who will be allocated, unless exceptional circumstances, with an actual budget
- provide a realistic scope of work in accordance with the available budget
- respect the privacy/ownership rights of the losers over their propositions
- sign a non-disclosure agreement with the above mentioned agencies so as to protect their ownership rights
- return all elements losing agencies provided

\*This non-exhaustive list states criteria mentioned in various guides for good practices written by professional organisations



## GENERAL COMMITMENTS

### **1/ TRANSPARENCY**

Agencies-companies/advertisers will insure maximum transparency in each tendering stage for maximum efficiency and provide the same information to every competitor to ensure equity.

### **2/ RESPONSABILITY**

Agencies-companies/advertisers must responsibly engage in tendering, carefully assessing their involvement when it comes to putting teams to work and the costs this process generates on both sides. Committing is respecting the financial balance of companies, considering the fact it represents a massive investment.

### **3/ SINCERITY**

Agencies-companies/advertisers must loyally, sincerely and truly engage in tendering.

## WHAT IS THIS CHARTER FOR ?

Wishing to work hand in hand for more responsible, transparent and sincere tenders, communication agencies and companies/advertisers have been working on a Charter each and everyone can subscribe to in order to publicly assert their commitment. This Charter, designed to provide a virtuous framework for agencies pitches, is an extension of the guides for good practices put together by every professional organisation - AACC, ADC (work in progress), ANAé, SYNTEC Public Relation Consulting, UDE-CAM - with the UDA.

This one and only document can be used for any kind of tender (except public tender), regardless of size, area of business, method... For subscribers who wish, becoming a member of this Charter can be part of a CSR company policy.

## THE CHARTER'S PRINCIPLES

The Charter encompasses three general commitments: transparency, responsibility and sincerity and provides for each precise implementation criteria. Agencies and companies/advertisers who sign the Charter agree to apply as many criteria as possible each time they have a pitch or respond to one, with a view to continuously progress.

## HOW TO SUBSCRIBE ?

Subscribers are asked to observe 3 main general commitments each time they have a pitch or respond to one. To join or quit the Charter, they just have to send a letter signed by their management to the UDA (for companies/agencies) and to their association for agencies (See enclosed model). The Charter is open to all, be they members or not of one of the involved professional organisations.

## PROMOTING THE CHARTER

Subscribers must inform as many of their business partners as they can about their commitments. They are encouraged to put someone in charge of monitoring the Charter. And besides guides for good practices, the professional organisations involved (AACC, ADC, ANAé, SYNTEC Public Relations Consulting, UDA, UDECAM) also offer tendering training sessions to any signatories' employees.

## HOW TO IMPLEMENT THE CHARTER ?

The Charter was designed to be a continuous improvement process, voluntary chosen by companies. Each company subscribing to the Charter appoints a referent for the Charter in its organization, charged with implementing and monitoring the Charter. Anyone in charge of a pitch within a subscribing company (calling or responding) lists in a document that will be handed in with the tender the criteria selected in order to observe the commitments made by their company for this particular tender.

The enclosed document should list every single criterion. It is meant to be both educational and inspiring. It should point out criteria that, for this particular tender, relate to each general commitment. According to the distinctive features of the current tender or internal processes, the appropriate criteria will be short-listed. Little by little, the company will make those criteria their own and thereby improve the coherence of its pitches.

## MONITORING THE CHARTER

Names of the subscribing companies are available on the website dedicated to agencies' tenders and maintained by the involved professional organisations.

Each time they have a pitch, members can select (on a secure page of the above mentioned website) the criteria they used in order to observe the general commitment they made when signing the Charter.

Professional organisations altogether report the annual progress of the Charter like so :

- number of members
- choice frequency of each criteria
- number of criteria chosen for each tender and any other indicator monitoring the progression process

A general presentation of those analyses along with the testimonies of various subscribers are reported each year.

Being a member of the Charter means mutual trust and a will to do better. It must not be used to publicly shame one of the two subscribing parties.

When asked, the corresponding professional organisations will do their best to help and guide members caught in a conflict and even organise mediation upon request