



# Agency proposal guide

**BACK YOUR PITCH WITH EVIDENCE-BASED RESEARCH**

# Let's face it: Agencies move fast.

There are crazy timelines, high stakes, and everyone is stretched thin. That's the grind. And yet, we all know that winning high-quality business and building value-based partnerships are the keys to success. So, how can agencies win more deals and build better partnerships with brands? By revealing the untold truth to your clients with evidence-based proposals.



## INTRODUCTION

Top performing agencies understand that the secret to a high-converting proposal is great storytelling. A compelling story that taps into emotions and leaves an impression is one of the most persuasive and powerful tools in any arsenal.



# INTRODUCTION

Anecdotes and assumptions won't cut it though. No matter how great the story is, if it's not right for the audience, it'll fall flat. The story has to be grounded in facts that prove that the agency understands the brand's audience, goals, market, competitors, and more.

But with so little time to prepare, how can your agency make sure you're putting your best foot forward for each and every proposal?

The short answer is primary research. The problem, however, is that this kind of research is often too expensive and too time-consuming to be able to prepare before each and every proposal.

That's where agile insights come into play. But more on that later.

## BRING YOUR PROPOSALS ACROSS THE FINISH LINE

Tell your clients a story that hasn't been told before—and back it up with evidence-based research.



GOOD ISN'T GOOD ENOUGH. PROVEN IS BETTER.

## Most professionals in the agency world are pretty good at what they do

The unique experiences and skill sets required to thrive in this hyper-competitive and fast-paced space are invaluable when delivering quality business outcomes to brands. But “good” isn’t always enough in the proposal process. Good can be subjective—a matter of taste or preference. But proven is hard to dispute.

How do you prove if a concept, advertisement, or campaign will resonate with an audience? You test it. You actually show it to the audience, get their feedback, then iterate and improve until the audience is delighted.



According to Greenbook, when advertisers were asked what their number one resource to improve the pitch process was, 33% said survey research, 30% said competitive intelligence, and another 29% said trend analysis.

[LEARN MORE](#)



GOOD ISN'T GOOD ENOUGH. PROVEN IS BETTER.

*Your accounts are going to love your work, not just because it's better, but because it's proven.*



GOOD ISN'T GOOD ENOUGH. PROVEN IS BETTER.

# The (proven) power of evidence-based proposals

Looking for an example of how an evidence-based proposal not only won business for an agency, but also paid off for the client? We figured you would. Here's a story how EP&Co leveraged aytm's agile research platform for the win.

## CHALLENGE

### Men's Wearhouse needed messaging tailored to their audience

Men's Wearhouse, a formal clothing retailer for men, found it challenging to change their brand image for the modern shopper. It's widely accepted that men typically don't exactly love shopping—they're considered hunters instead of browsers. So while the retail chain provides affordable custom suits and has tailors on-site in every single store, men often don't come into the stores until the weekend when they need the suit. EP+Co set out to understand this pattern by tapping into aytm's agile resource tools to better understand this audience.

## SOLUTION

### Accurate measurements from custom suit shoppers

A study conducted on the aytm platform found that 91% of men were open to the idea of owning a custom suit, but only 15% believed that custom suits were for "men like me." Respondents thought that a custom suit is a tailored or slim fit suit. As a result, EP+Co needed to reorient the idea that a custom suit is your personal measurements. It was also discovered that most men didn't feel comfortable with their proportions and build.

## RESULTS

### Creative insights that fit the evidence

EP+Co took the idea that however you're built, you look better in a suit that's built just for you. Men's Wearhouse was thrilled with the proposed creative shift, especially after seeing the data that backed up the compelling narrative. After implementing this strategy, Men's Wearhouse saw the best year-over-year same-store sales with custom suits to date. This also had a significant lift in their product salience due to their ongoing brand tracker efforts.



## RESEARCH THAT CAN KEEP PACE

In an ideal world, every proposal would be rock solid and based entirely on multiple rounds of research and iterations to land on the perfect concept. But who has the time? That level of research simply doesn't always fit into timelines.





## RESEARCH THAT CAN KEEP PACE

### We all know the reality

When an RFP comes through the door, your team needs to be able to get up to speed quickly on the category, deliver insights on how to frame the pitch, and start thinking through the actual project and journey mapping. Most likely, this all needs to happen within just a few short days. This means that the traditional research turn-around time of 6–8 weeks simply isn't going to cut it.

You need a partner who can deliver the insights required to win that business and deliver on the proposed project. The good news is that agile research can be fielded in just 24–48 hours, revealing new opportunities to build proven, evidence-based proposals quickly and affordably.



# What is agile research?

## BEYOND THE BUZZWORD

Agile principles have been around for a while now. First conceived in the software development world of Silicon Valley, they've since become a primary goal for businesses in virtually every industry. Agile represents a way of working that maximizes efficiency and, well, agility.

But we get it... Agile has become such a popular buzzword over the years that it's lost most of its meaning, even in the research world. Bear with us though, because beyond the buzzword, there's real value for researchers, from the experts to those who just want to take a more data-driven approach to doing business.

Agile research refers to primary quantitative research that aims to quickly and iteratively collect consumer feedback to guide decision-making throughout the business. This could involve field-testing a new campaign message, A/B testing new ad creative, or generating ideas on how to improve an existing offering.



## 4 cornerstones of agile research

### Iterate quickly without sacrificing quality

Embrace experimentation. Get quick wins and losses. Leverage technology and automation while incorporating research best practices to turn around quality results at speed.

### Be ready to adapt and change course

Quick-turn, iterative research means a constant flow of insights. Be ready to digest and act quickly, even if that means pivoting when the data calls for it.

### Incorporate insights at every stage of development

Agile research works because it is both business-driven and consumer-driven. Collaborate throughout the entire consumer innovation lifecycle to maximize impact.

### Collaborate and cooperate to minimize friction

Share data and insights across teams, gather suggestions from stakeholders, and implement feedback in order to smooth the pathway from insights to action.

# Top benefits of agile research for agencies

There are a number of ways that agile research helps firms become better positioned to secure new business and grow existing client relationships:

- Consistency in terms of speed, cost, and quality
- Flexibility when things (inevitably) change in scope
- The ability to quickly and iteratively test and develop concepts
- Answers to the questions brands can't answer themselves
- In the moment, real-time feedback from brand audiences
- Improved brand outcomes that build stronger partnerships with accounts



## RESEARCH THAT CAN KEEP PACE

*Studies show that marketing agencies that research their clients' markets at least quarterly grow more than ten times faster and are nearly twice as profitable.\**

\*Research conducted by [Hinge Marketing](#)



RESEARCH THAT CAN KEEP PACE

# Agencies harnessing the speed of agile research

So how have agencies been able to do more with agile methodologies? We caught up with H&L Partners and Campbell Ewald to hear what they had to say about how the switch to agile has increased their speed to insight.



H&L Partners

## INSIGHTS AT TWICE THE SPEED

Since partnering with aytm, H&L has cut their research time in half—a game-changer in terms of keeping up with evolving consumer trends, wow-ing prospects and clients with industry know-how, and freeing-up time to focus on delivering more value to their clients.



*It's cut our research time in half. When we go into new business pitches, we're able to say, 'we have a great platform that's easy to use, cost-efficient, and time-efficient,' that provides powerful insights to drive your brand forward. That's given us a competitive advantage in the marketplace.*

**Andrew Brown**, Former VP of Insights and Brand Planning at H&L

[GET THE FULL SUCCESS STORY](#)



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Campbell Ewald

## ONE DAY AVERAGE TURNAROUND TIME FOR RESEARCH

Campbell Ewald uses aytm's research platform to conduct their own internal research, gather insights for new business pitches, and help their clients explore, evolve, and innovate. The average turnaround time to uncover insights with aytm is just one day, which has helped set the standard for agile insights amongst their client-base.



*The hands-on approach of the team has been fantastic. Response times are very fast. We have a great partnership and aytm helps us tackle challenges around methodology and getting things in the market very quickly. We value the partnership and look forward to working on more projects in the future.*

**Chris Marchegiani**, Former Group Director of Brand and Integrated Strategy

[GET THE FULL SUCCESS STORY](#)



## TYPES OF RESEARCH THAT WIN AGENCY PROPOSALS

Agencies can utilize and benefit from any type of agile research depending on their account needs and service offerings. Here are just a few examples to get the gears turning.





## TYPES OF RESEARCH THAT WIN AGENCY PROPOSALS



# Concept and creative development

Ever heard the saying: “Half of my advertising budget is wasted. Trouble is, I don’t know which half”? This type of research aims to solve that problem by evaluating whether your proposed concepts, campaign messaging, and creative will reach the right people and deliver the desired results.

### TYPES OF CONCEPT AND CREATIVE DEVELOPMENT RESEARCH

- Concept testing
- Creative messaging impact assessment
- Tagline testing
- Creative messaging optimization



## Concept and creative development

### HOW IT SUPPORTS YOUR PITCH WORK FOR AGENCY GROWTH

One of the best pieces of advice for crafting the perfect agency pitch is to “show, don’t tell.” Don’t tell your prospects that their audience will love your ad creative. Show them how the audience reacts in your primary research.

### HOW IT IMPROVES BRAND RELATIONSHIPS

For existing accounts, campaign effectiveness research can help to reinforce the quality and impact of your work. By adding this type of research to the proposal process, you’ll ensure that each and every campaign aligns with the target audience, maximizing returns for the brand.



# Brand research

Brand research is an indispensable means of establishing the images, narratives, and characteristics associated with a particular brand and ensuring that they stay relevant to their intended audiences. Without brand research, brands have no way to know what impression they're making on consumers (or if they're even on their radar at all).

## TYPES OF BRAND RESEARCH

- Brand advocacy
- Brand awareness
- Brand loyalty
- Brand penetration
- Brand perception
- Brand positioning
- Brand value



## Brand research

### HOW IT SUPPORTS YOUR PITCH WORK FOR AGENCY GROWTH

Knowing exactly how an audience views and perceives a brand is an invaluable advantage during the pitch process. In-house marketers live and breathe their brands day in and day out. That can make it easy to lose track of the reality of what consumers actually think. Customize your pitch based on your preliminary research to reveal these insights, and be transparent about how you came to these conclusions.

### HOW IT IMPROVES BRAND RELATIONSHIPS

Brand research helps position your agency as a true partner to your accounts by uncovering opportunities to strengthen the emotional connection between brands and their customers, helping to prioritize initiatives that improve brand performance, and highlighting the most influential brand interactions.



## TYPES OF RESEARCH THAT WIN AGENCY PROPOSALS



# Market landscape

Market landscape research is a structured way of identifying key players in a certain space and mapping their strengths, relevant characteristics, and outreach strategy. This type of analysis requires a detailed investigation into the brand's competitors' services, programs, marketing and communications design, community outreach, messaging, and more.

## TYPES OF MARKET LANDSCAPE RESEARCH

- Competitive analysis
- Gap analysis
- Consumer segmentation
- Segmentation analysis
- Partnership analysis
- Competitive whitespace analysis



# Market landscape

## HOW IT SUPPORTS YOUR PITCH WORK FOR AGENCY GROWTH

The success of your pitches hinges on one thing: How well do you know the brand you're talking to? The more familiar you are with their market, their customers, their products, and their business, the better your win-rates will be. Prove that you will leave no stone unturned when selecting the best strategies and tactics by showcasing a solid understanding of the marketplace.

## HOW IT IMPROVES BRAND RELATIONSHIPS

Client relationships are everything. It helps when you can anticipate your account's needs by tracking market trends, identifying market gaps, or spotting disruptors early and appropriately adjusting strategy.



# Consumer insights

Any time a consumer interacts with a brand, there's an opportunity to impact their overall impression of the brand. Consumer insights allow brands to understand what consumers want from their products—and why. Brands can then use that information to make informed decisions on how best to serve those consumers.

## TYPES OF CONSUMER INSIGHTS RESEARCH

- Path to purchase and customer journey
- Product attitudes and usage
- Shopper insights
- Audience analysis



## Consumer insights

### HOW IT SUPPORTS YOUR PITCH WORK FOR AGENCY GROWTH

One of the biggest objections in-house marketing teams have to outsourcing to agencies is that, “they don’t know our audience and it’ll take too long to get them up to speed.” Time is of the essence, after all. But proving your knowledge of the brand’s core segments in the pitching process will put these concerns to bed once and for all.

### HOW IT IMPROVES BRAND RELATIONSHIPS

Taking a deep dive into brand target audiences can reveal how they feel about brands, what influences their buying decisions, and other valuable insights that can be used to guide brands to stay one step ahead.





## HERE'S WHAT IT LOOKS LIKE IN PRACTICE

We've all been there. It's Friday afternoon, and all of a sudden there's a fire drill that needs to be handled ASAP, or else Monday the wheels actually WILL fall off. Does this sound familiar?

09.09.2022

 **Your AE** Friday, 3:15 PM

Hey, I have a pitch on Tuesday morning. We need to get some preliminary feedback on the account's customer base.

 **You** Friday, 3:15 PM

Wait. For real?

 **Your AE** Friday, 3:17 PM

For real.

 **You** Friday, 3:17 PM

Ok. We'll make it work, but a little more heads up next time.

09.16.2022

 **Your AE** Friday, 4:45 PM

Ok here's the sitch...

### DOES THIS REMIND YOU OF LAST FRIDAY?

We don't want to rehash last week's stressors, but by reflecting on our past challenges, it's possible to open new pathways for solving our challenges in the future.



## HERE'S WHAT IT LOOKS LIKE IN PRACTICE

### THE BRIEF

We just got word that a prominent lawnmower company is looking for a new AOR to help revamp their messaging strategy. It sounds like they're currently in a bidding process with new full service agencies to find one that understands their brand, their consumers, and the challenges they're facing.

### THE RESEARCH

Let's start with secondary research. Let's hit the web and learn who we're connecting with here. Who is buying lawnmowers? What information passes their periphery, and what sticks? Do you feel a hypothesis forming?

### THE HYPOTHESIS

I wonder how many people who buy lawn mowers are persuaded by brand clout? How does advertising and messaging come into play here? How about consumer review sites?

### WHAT DO I NEED IN ORDER TO VALIDATE THIS?

- Quickturn results from a trusted quantitative partner
- Easy access to data with an intuitive platform
- High-quality sample respondents
- A support team to answer any questions as they arise
- Clean data exports for multiple outputs
- Data visualization tools to help with storytelling
- A cost-effective resource with upfront pricing

### HERE'S THE RESEARCH

Let's ask 800 consumers who recently purchased lawnmowers about the biggest influencers throughout the decision making process. By doing this we can understand a hierarchy of information to inform a new messaging strategy.

### FINDING THE STORY

Ok, so we got our data back and it's a no-brainer. Peer reviews were twice as likely to influence someone to purchase a lawnmower. You, in all your genius, advise your aid to propose the brand reinvent their messaging strategy so that it doesn't look like advertising.



## HERE'S WHAT IT LOOKS LIKE IN PRACTICE

### THE RESULTS

Your AE knocks that pitch out of the park. You get props from the team but also that rewarding sense that the million other things you have to do are that much closer to the top of your list. And plus, now you know how to handle this in the future... except it probably won't happen, because they made a promise that this was the last time (yeah, right).



## FINAL THOUGHTS



# Big wins with agile insights

In today's fast-moving and highly-competitive environment, traditional research methods just don't cut it. Marketing agencies are often pressed for time, needing to become experts on a new audience within just a few days.

But building proven proposals based on agile research can help change all of that. At aytm, our powerful insights platform lets agencies find and segment any audience, design and launch their own surveys, and analyze and share findings with stakeholders—all with expert automated tools, built-in best practices, and an outstanding support team standing by to help you confidently achieve your goals.



## ABOUT AYTM

Put plainly, we're an InTech (insights technology) company. But we're not all that plain.

For some, we're consultants. For others, we're a secret weapon. To us, we're an automation platform, an agile innovator, a strategic research consultant, a self-serve insights buffet, a global community, and so much more.

Our insights platform does it all. You can find and segment your audience, design simple and sophisticated surveys, and collect and organize your findings to advance your ideas. Full lifecycle insights have never been more accessible.

So whether you're exploring your curiosity and just getting started, or you're already on the path towards a more research-driven approach to your proposals, aytm has you covered every step of the way.

[LEARN MORE ABOUT HOW AYTM CAN HELP](#)



