



“FIT TO WIN” CHART:

A New Business Evaluation Guide for Public Relations Firms

The new business process (and the RFPs associated with it) has the unique ability to cause both agony and ecstasy. Public Relations Firms are taking a hard look at what new business is worth pursuing – to determine whether there’s a good fit and a high potential to win a competitive piece of business.

The “Fit to Win” chart contains fundamental, yet critical, factors to consider before pursuing a new piece of business. Is your firm fit to win?

Assign points from 4 to 0 for each question below to help determine whether your firm should pursue the business:

- 4 = Strongly agree
- 3 = Agree
- 2 = Neutral/maybe
- 1 = Disagree
- 0 = Strongly disagree

POINTS

1. Is the business a good fit, strategically?

- This is a category of opportunity for our firm _____
- The relationship can be leveraged into future, additional business _____
- The client is a “name” we want on our client list _____

2. Is the business a good fit, culturally?

- We have thoroughly researched the prospect and believe we can work with them _____
- The prospect appears to be honest and straightforward _____
- We have a similar business philosophy _____

3. Is the business a good fit, financially?

- We know the budget _____
- The budget matches client expectations _____
- We anticipate the budget negotiating process will be fair and equitable _____
- We can make a reasonable profit _____

4. Is the business a good fit, operationally?

- If we win this business, we have the time and resources available to service it _____
- There would be no adverse impact on current clients (conflicts of interest) and/or account teams _____



POINTS

5. How competitive are we? (Be RUTHLESSLY honest.)

- We have a good sense from the client briefing about the assignment _____
- We are formidable competitors within the context of this pitch _____
- We have the necessary experience and staff to handle this assignment _____
- We are not a "stalking horse" in this pitch _____

6. What are the expectations?

- Seems like a good fit, in terms of what the clients expects from our firm _____
- We have confidence in the prospective client's ability to define and measure a successful program _____

7. a. Are there any hidden cards or jokers?

- The new business opportunity is presented on a level playing field _____
- The prospect has a good reputation with regard to previous Agency relationships _____

b. Answer yes or no (yes = 4 points; no = 0 points)

- Our questions about this prospect have been adequately answered, (by prospect or search consultant) _____
- We have researched the prospect thoroughly, and are not relying solely on the RFP/consultant for background information _____

8. What is really motivating us to pursue this account?

- We are not pursuing this business just for pride/ego _____
- P&L pressure is not the primary reason we are pursuing this business _____
- Pursuing this prospect is sound business, not wishful thinking _____

Our Total Points _____

TOTAL POINTS: After assessing the business fit, should we pursue?

- 80-100** Go for it – seems like a good match and we have what it takes to win
- 60-80** Seems like the pieces fit – should be worth the time and effort
- 40-60** Is this only a coin toss with even odds? Seriously consider before pursuing
- 20-40** Not a great fit, long odds. It's better to walk away
- 0-20** Does not fit – run, don't walk, away

The Council would like to thank Jerry Swerling, PR management consultant and Director of PR Studies at USC Annenberg for his contributions to this document.

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