



Agency Search

Group Discussion

Agency Relations Committee, West Coast Chapter
November 15, 2011



Overview

- ANA/4A's agency "search & selection" task force was formed to *provide best practice guidance for agencies and marketers pertaining to the agency search and selection process.*
- This guidance was recently formalized in a jointly published white paper, debuted at Advertising Week October 2011.

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How to conduct agency search: ANA and 4A's offer guidelines

After spate of long, unwieldy reviews, agency and advertiser associations give advice to head off trouble before it bubbles up



Taskforce Members



- Laurie Coots, *TBWA Worldwide*
- Diane Fannon, *The Richards Group*
- Stephen Larkin, *Mullen*
- Dave Lubeck, *Bernstein-Rein*
- Michael Miller, *MRM Worldwide*
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- Matt Ryan, *EuroRSCG New York*
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- David Selby, *Shafer Carter Condon*
- Chris Shumaker, *Publicis USA*



- Debra Giampoli, *Kraft Foods*
- Bruno Gralpois, *Visa*
- Julie Koewler, *Accenture*
- Colleen Mascia, *Pfizer*
- Eve Reiter, *American Express*
- Steve Smith, *Enterprise Holdings (retired)*
- Leo Tighe, *Intuit*



What's Included

- Client Best Practices
 - Before You Even Decide to conduct a Search
 - You're Conducting a Search – Initial Considerations
 - Initial List/Request for Information
 - Semi-Finalists/Request for Proposal
 - Finalists
- Agency Best Practices
 - You've Received an RFI or RFP – Now What?
 - You've Made the Cut – Optimizing the RFP/Pitch Process
 - A Word About "Spec" Work
 - Contract and Terms
- Appendices
 - Industry Resources for Agency Search and Selection
 - Cultural Compatibility
 - Thoughts on "Spec" Creative Assignments AKA shootouts



Guidelines for Clients

- Before You Even Decide to Conduct a Search
 - Replacing an incumbent or reassigning a significant piece of incumbent business
 - Seriously evaluate whether or not it is required
 - If required, conduct a self-examination / be honest with self and with agency
 - Focus on getting problems on the table – may not realistically be able to fix them
 - Adding a new agency (without replacing an existing one)
 - Structure yourself for success – sufficient budget lead time, proper senior management support, clear strategy and decision-making process, etc.
 - Clearly define purpose of search – new capabilities, geographical reach, adding bandwidth, etc.



Guidelines for Clients

- Your Conducting a Search – Initial Considerations
 - Identify internal search team / decide who will lead the pitch
 - Discuss time commitments and responsibilities
 - Define objectives, requirements and decision criteria and be honest
 - Achieve internal alignment on expectations and get senior leadership approval
 - Agree on the search approach, e.g. “meet and greet” vs. full blown pitch
 - Identify and agree upon a meaningful list of competitors
- Optimal Timing for Agency Search Process (3 Months Total)
 - Identification phase: One week
 - RFI: Two to three weeks
 - RFP: Four to five weeks
 - Finalists: Six weeks



Guidelines for Clients

- Initial List / Request for Information (RFI)
 - Purpose is to request detailed information on agency, e.g. management, organization, operating structure, business approach, etc.
 - You want to motivate the best and most relevant agency candidates to apply
 - Prepare an outline identifying agency requirements
 - Develop an RFI list of 10 to 15 agencies
 - Multiple ways to build your list, e.g., peer experience, agency websites, search consultants, etc.
 - Discuss key business terms upfront, e.g., competitive conflicts, minority business requirements, travel policies and identify deal breakers



Guidelines for Clients

- Suggestions for a Smoother RFI Process
 - If the RFI is designed by procurement, ensure it is appropriate for marketing
 - Streamline questionnaires or RFI documents – one to two pages max
 - Decide on what should be addressed in writing vs. discussed
 - Know why you are asking each question – ensure focus
 - Allow agencies a realistic amount of time to respond
 - Use a common template for easy comparison of agencies
 - Urge agencies to be complete but succinct



Guidelines for Clients

- Semi-Finalist / Request for Proposal (6-8 Agencies)
 - Before scheduling time with agencies, hold internal “requirements” and “grounding” meetings
 - Clearly communicate requirements to agencies – better input leads to better output
 - Discuss compensation and set budget expectations early
 - Discuss timetables, agency experience required, performance metrics, role of online, mobile, geography
 - Provide adequate access to client for agency questions
 - Strongly advise client visit agency in their offices



Guidelines for Clients

- Semi-Finalist / Request for Proposal (cont'd)
 - Insist on meeting key people who will actually work on your business
 - Pay attention to cultural fit and chemistry
 - Allow a minimum of two hours for the meeting
 - Ensure the new agency will compliment others on your roster
 - Don't just answer their questions, evaluate and learn from what they are asking
 - Evaluate the agency:
 - Develop a simple, focused evaluation form for your team and complete it immediately after each meeting
 - Create a process for individual feedback that avoids bias from a group environment
 - Then bring the group together to discuss
 - Visit the agency at their office



Guidelines for Clients

- Finalists (Up to 3 Agencies)
 - Pre-Final Guidance (preparation for the Finalists' Meetings)
 - Set expectations for the final round deliverables and make it as “real-life” as possible
 - Decide whether or not spec work is really necessary and discuss ownership of creative
 - Provide adequate access to client for agency questions
 - Continue to evaluate chemistry and culture
 - Provide the agency with evaluation criteria
 - Provide continual and timely communication on process and next steps



Guidelines for Clients

- Finalists
 - Final Day Guidance (Conducting the Finalists' Meetings)
 - Discuss logistical specifications with agency ahead of final presentation
 - Provide the agency with a list of all clients expected to attend
 - Have a “grounding” meeting with your team
 - Allow sufficient time for the agency to answer the brief and adequately show its work
 - Clearly allocate amount of time and structure for the final presentation and stick to it
 - Continue to evaluate chemistry and culture



Guidelines for Clients

- Finalists
 - Post-Final Guidance (After the Finalists' Meetings)
 - Great work from great agencies comes from a great relationship with a great client
 - Use a simple and focused evaluation form for the client team
 - Meet as a team to discuss and decide
 - Notify winning agency prior to completing contract agreement
 - Once agreement is reached, notify other agencies at same time
 - Don't forget about chemistry and culture
 - Offer non-winning agencies a debrief opportunity





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