



Does the Shoe Fit?

Finding the Agency of your dreams

Whoa!



Before you jump the gun and enlist an agency, there are several considerations to make.





So how do you pick?





**Start with the right
questions.**





ask

01

Why are you looking for an agency?

Ensure your motives are clear. Will this benefit your brand and the shareholders of your organization?

02

Do you have the green light?

Have key decision makers and the upper management of your company endorsed this action?

03

Is procurement involved?

If your company has a procurement team, make sure they are involved from the get go.

04

Do you need help?

It's completely normal for companies to hire specialists and consultants to give you step by step guidance on the selection process.



ask

05

Have you checked your contracts?

Check them again. And once more. Thrice just for good measure.

06

How are you breaking the news?

Balance the desire for confidentiality with the chance the incumbent will hear the news from a third source

07

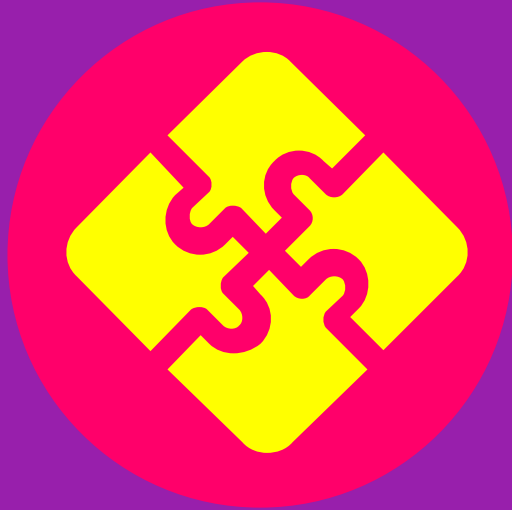
Is there a clear brief?

All key decision makers should come together to decide on the brief. Consider every angle of the business during this process.

08

What kind of pitch is needed?

There is more than one way to conduct a pitch. Traditional pitches can be expensive for both client and agency



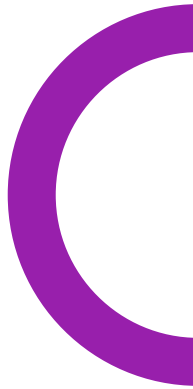
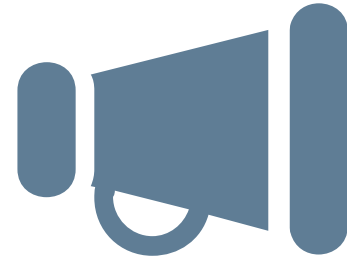
Hop into the details

Clear the confusion.
Step by step processes that get
you where you want to be.

Do you have an agency?

If yes, then **how many?**

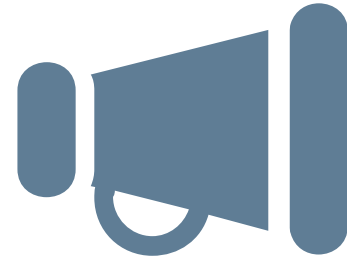
Is the client happy with any of them?



Do you have an agency?

If not, then **why** do you need one?

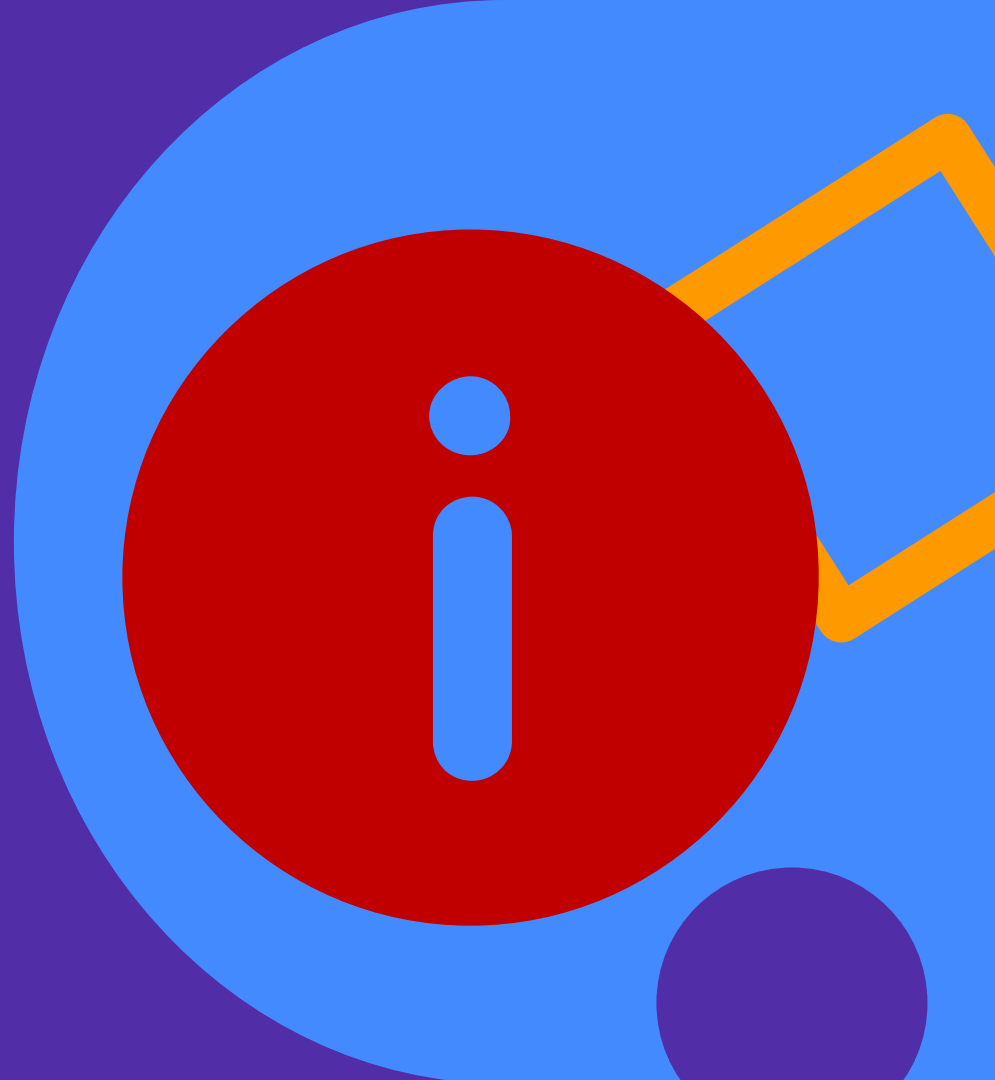
Have **other options** such as freelancers and in house assets been considered?



Is the **break up** imminent?

Make sure great effort has been made to restore the client-agency relationship before deciding to move on.

Are there any benefits to sticking with the devil you know?



Rebuilding Relationships



Personnel Problems

If the issues you face are related to personnel then changes in the team can lead to a better experience.

Effective inter-personal management is necessary to monitor relationships and smooth running of business.

Consultant Counselling

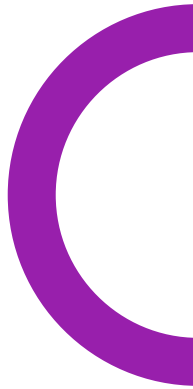
Often there is room for consultants to act as the middle man and manage timelines, workflows and even relationships to ensure a better working relationship.



The In-House Option

Is your expenditure on communications high enough to **justify** an entire department?

Is attention to detail and quick turn around time more important than **creative content**?



To **freelance** or not to **freelance**?

Can your companies needs be fulfilled by one or more freelancers?

Often, freelancers specialize in a specific field. This means you may have to hire more than one for a full creative team.

Do you have the time to manage a team of freelancers?



Why choose agency?



Specialization

People hire lawyers and accountants for their special skills.

The same can be applied to agencies with the variety of different specialized agencies that exist including: Creative, Digital, Event Management and much more.

How many Agencies does your brand require?



Full Service Agency

These agencies are often called 'one stop shop' that provide everything from media to marketing.

Specialized Agencies

The number of communication channels have grown exponentially over the years. There has been a rise of agencies that specialize in a specific area of communication.




Lead Agency or Client Management



In the event where **more than one** agency is hired, is the client able to manage **effective workflow** and **communications** between them?

Alternatively, is there a **lead agency** that is able to delegate tasks to the others while being **responsible** for **efficiency** and smooth delivery?



A glass jar is tipped over, spilling out a large number of coins onto a wooden surface. The coins are in various colors, including silver and gold. A purple circle is overlaid on the center of the image, containing the text "Let's Talk Money." in white. Below the text is a horizontal blue bar.

Let's Talk
Money.

Setting the Budget

This is an extremely complex process.

Budgets should be decided on **early on** in the process, and revealed to the agency during the briefing process.



Agency **Remuneration**

Remuneration should be negotiated keeping in mind the **scope of work** for the pitch.

This is also a conversation that should be had **early on** and a consensus should be reached before the pitching process begins.





Involving Procurement

A **partnership** between marketing and procurement should be established from the **get go**.

They offer a **neutral and rational** assesment of the agency.

They have **specialist knowledge** of the communication needs of the organization.



Review yourself or use a consultant?



Consultant

The searching and selection process is very complicated. Consultants have their finger on the pulse of the industry, and are able to provide professional advice on the process.

Review Yourself



Enlist a decision making team that consist of senior members of the company. Build up knowledge of agencies in relevant sectors and develop a project plan.

The Brief

A well defined brief is often the difference between a fantastic pitch experience and a sub par one.



A Good Brief: Overview

This should include a review of the brand's **history** and current **goals**, the **budget**, the brand's **communication needs** and a candid assessment of the organization's **position** as well as a note on the **competition**.





Key elements

Analysis

The written brief should include an extremely honest review of the business, and what they hope to achieve with their communication.

Budget

Budgets affect every element of the pitch. To ensure that the ideas pitched by the agencies are actionable, budgets should be disclosed early on.

Services

The core services required of the agency. This can cover anything from size and location to reputation and culture.

Be the right sized fish in the right sized pond.

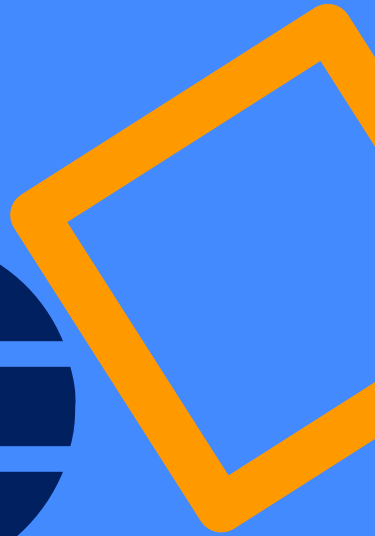


Managing **Conflict**

Letting the **world** know

Agency searches are **extremely** newsworthy. This means that it's almost impossible to keep them secret.

Publicity can be good for the brand if managed well. It is **imperative** to have a communication strategy from the very beginning.





Telling the Incumbent

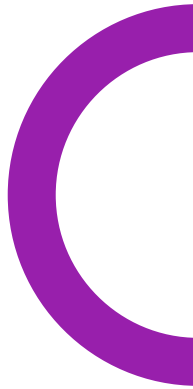
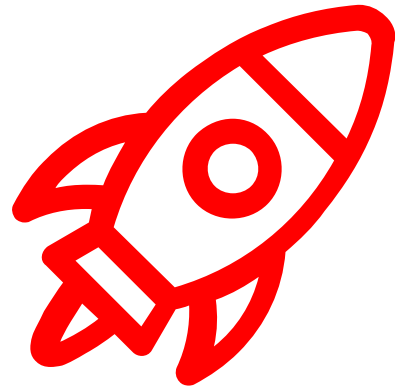
It is more courteous to inform them of your decision before the press.

A communication strategy should be developed to benefit both parties.

Informing Seniors

Poor communication often leads to disaster. Ensure that every key player and decision maker within the brand is aware, and on board with the decision to hold a review.

Never embark on a review without a **strategy**.





Informing the winners

(and the losers)

Rationale

Develop a concise rationale for why the winner was selected and what they were able to do effectively.

Phone Calls

It is best practice to personally call every agency and deliver the news.

Once the winner has confirmed they would take the account, inform the unsuccessful agencies before confirming your decision with the winners.

Debrief

It is admirable to conduct a lost order debrief with losing agencies. Use this opportunity to give them constructive feedback and return any confidential materials.



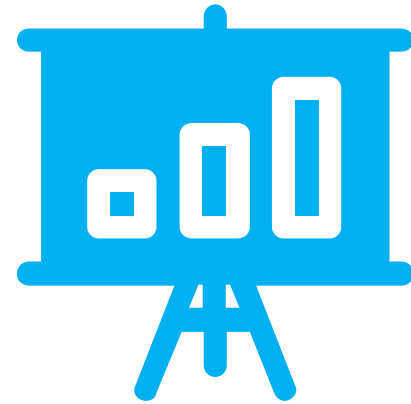
The **Pre-Pitch**



Desk Research

Doing your research is an extremely important part of the review process.

Outlining a **brief**, understanding the agencies and a **systematic** collection of material is part of laying the **groundwork** to a smooth selection process.



Longlisting

This is a process where all agencies that meet the basic requirements of the brand are screened and either taken to the shortlist or rejected.

This is done using a standardized questionnaire sent out to agencies that simply collects the core criteria.





Pre-Pitch List

Accepted best practice is to choose **no more than four** agencies on the pre-pitch list. This is the number that is the most **manageable** for the next part of the selection process.

The agencies on the pre-pitch list can then be asked to prepare extended **credentials** or **think-piece** presentations.





The Incumbent

The client should take serious consideration on if they'd like the incumbent agency to **re-pitch** for their business or not.

The chances of an incumbent agency retaining are relatively low, depending on if the client-agency relationship has completely deteriorated or not.

The **Paperwork**





Proforma Agency Longlist Questionnaire





Questionnaire

01

Company Location

Agency name, address, website, telephone, fax and key numbers

02

Agency Personnel

List the senior management team and their summary C.V.s

03

Clients

List the agency's top 10 clients. Provide testimonial letters from the agency's current clients

04

Financial

Understanding the agencies ownership structure

Questionnaire

05

Remuneration

Describe the agency policy with respect to method of remuneration

06

Strategic Approach

Describe the processes the agency employs to develop marketing communications for brands.

07

Services

Summarize the range of marketing communications services the agency offers clients, indicating particular strengths.

08

Relevant Experience

Provide at least two case studies dealing with similar or analogous issues.

Questionnaire

09

Awards

List the creative and effectiveness awards the agency has won over the past three years, if relevant to the discipline or project

10

Creative Work

Provide samples of your creative work, with brief rationales and evidence of effectiveness.

Confidentiality and Copyright

During pitches, agencies will present ideas, concepts and art to clients. These are very **valuable** assets to the agencies, and need to be **protected**.

For this reason, it is important for both parties to sign a **non-disclosure agreement**.



An aerial, high-angle photograph of a dense urban skyline, likely New York City, featuring numerous skyscrapers and buildings. The image is dark and moody, with a purple circle overlaid in the center. Inside the circle, the text "The Pitch" is written in white, with "Pitch" in a bold font. Below the text is a horizontal blue bar.

The **Pitch**

Guidelines

Still by far the most popular method of choosing an agency.

For agencies a creative pitch is usually an expensive process which presents the highest risk.

For clients, this is likely an exciting time that can hinder objective judgment if expectations are not managed.



How many agencies should pitch?

To manage the process in the best manner possible, it is advisable to not have more than **three agencies** as part of the pitch process.

If the incumbent is included, that should be a maximum of **four** pitching agencies.



Pitch Fees

If applicable, pitch fees should be discussed in the pitch agreement.

In most cases, clients do not pay pitch fees due to the sheer oversupply of agencies.

If pitch fees are included, a discussion on intellectual property should also be had.



Types of Pitches

Classic

This type of pitch demands the most complete response to a client brief. It includes creative proposals, media plans, idea generation and creative presentation.

Strategic

This type of pitch focuses more on brand positioning and developing strategy rather than creative.

Creative

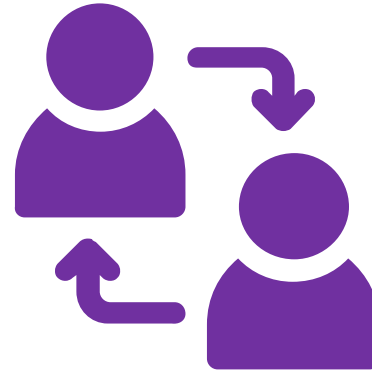
This route is justified when a client is sure of the strategy of their brand, and would like to see how an agency can represent this strategy creatively .

Sometimes, instead of a traditional pitch, clients can opt for a **workshop** to select the agency.

They give clients and agencies a deeper **insight** into working together, showing the client the agencies capability in a real world working scenario.

However, they are very **detailed** in preparation and professional assessment.

The Workshop



Venue

It is often best to book presentation dates and venues early on, to avoid **scheduling issues**.

It is also considered **best practice** to have these pitches at agency offices. Agency personnel are likely to be more comfortable and have the right equipment to present their pitch in the best possible light.

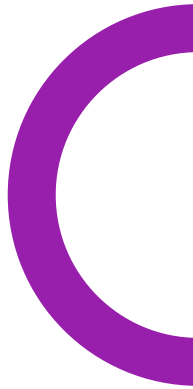
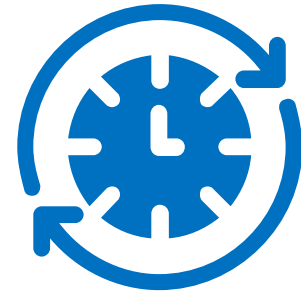


How much time?

For a proper response to a client brief, the ideal time an agency should be given is between **four and six weeks**.

This gives the agency enough time to **analyze** the brief, **develop** creative and strategic ideas as well as **refine** the overall pitch.

Ideally, a brand would like this direction to hold water for many years. Adequate time should be allowed to come up with substantial solutions.



A herd of zebras is shown in a savanna landscape during a golden hour, with dust kicked up by their movement. A large purple circle is overlaid in the center of the image, containing the text 'Moving In' and a blue horizontal bar below it.

Moving In





The Trial

In some cases, a trial project can be taken on before the full handover is made. During this process, the client is able to understand a more real world scenario on if this agency works for them.

The Contract



Ensure that there is a signed contract between agency and client that covers terms of service and scope of work.

Ensure that this is agreed upon and signed by both agency and client.

Handing Over

The **client** should take the initiative to ensure that there is a proper hand-over process. If the transfer of materials is left incomplete, it is simply a **loss** of an asset to the brand.

There should be a **comprehensive** hand over clause within agency contracts to ensure that all applicable assets are moved in a timely and **efficient** manner.

Maintaining the relationship

Agency relationships are extremely important to the health of a brand.

Like any other relationship, special attention should be given to **communications, candor**, shared **objectives**, common **interests** and **flexibility**.

A low-angle, upward-looking photograph of a modern glass skyscraper. The building's facade is composed of numerous rectangular glass panels held together by dark metal frames. The perspective creates a strong sense of height and scale. In the center of the image, there is a large, solid purple circle. Inside this circle, the text "The ROI" is written in a bold, white, sans-serif font. Below the text, there is a thick, horizontal blue bar. The background shows the sky with some light clouds and a bright sun flare on the right side.

The ROI



Worth Your While?

Awareness

Promoting your brand, products and services are how people find you. However, creating a brand that people **know** is one thing and creating a brand that people **love** is another. This is where agencies thrive.

Sales

When the right strategy marries the right creative, **magic** is made. This is where your company is likely to see a **boost** in sales, profits and overall business elevation.

Solutions

Agencies are built by creative **thinkers**. Enlist these brilliant minds to help you do more than just market your services.

The greatest agency client relationships have solved business problems that **revolutionized** industries



Thanks!

