



# Agency Selection Briefing Guidance

## Background

In October 2011, the ANA and 4A's published the Guidelines for Agency Search to document and publicize best practices for both clients and agencies to consider in the agency search and selection process. Those guidelines can be accessed on the respective ANA and 4A's websites.

As a follow-up to those guidelines, the ANA and 4A's believe there is an opportunity to further improve the productivity of the agency search/new business process, for both agencies and advertisers, by developing specific best practices guidance around the subject of agency selection briefing throughout the entire agency selection process.

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## Objective

The intention of this document is to provide basic guidance for clients who are unfamiliar with the fundamentals of briefing an agency during the agency selection process, and give clients experienced in agency selection briefings additional best practices to consider.

## Executive Summary

The ANA/4A's task force believes that every phase of a review, or agency search, requires a thoughtful briefing that provides specific direction to the agency. The review process should provide escalating information to the agencies as the review progresses from the initial phases (e.g., RFI, RFP, credentials) to the later phases (including any strategic and/or speculative work and finals presentations).

Each review phase warrants different types and levels of client briefing information.

### Initial List/Request for Information (RFI) Phase

*Think of the RFI phase as the ability to collect information that will help you preliminarily qualify a list of agencies for the final selection and eliminate agencies that don't meet your criteria.*

- The purpose of an RFI is to gather basic information about many agencies.
- At this point, you're not asking the agencies to do any customized work beyond introducing themselves.
- Share enough information about the search and your expectations as a client to allow the agencies to make an informed decision about whether this is a good fit.

## Executive Summary

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### Semi-Finalist/Request for Proposal (RFP) Phase

*Think of the RFP as an opportunity to learn which agencies you want to include in your list of finalists, after selecting the best-qualified candidates.*

- The RFP process should clarify the client's expectations, and provide assurances that the agencies can handle the project/assignment.
- RFPs require a greater investment of time.
  - ▶ The client needs to provide more in-depth information to allow the agencies to customize their responses.
  - ▶ The agency needs to provide more in-depth information about their appropriate experience.
- The RFP phase is a good time to begin assessing cultural fit.
- Many reviews include semi-finalist meetings (often referred to as *credentials* or *chemistry* meetings), which serve as a transitional step to narrow the field. These meetings should include an advanced discussion of the goals and expectations for the sessions, as well as thorough briefings.
- Semi-finalist meetings are most productive when they take place in the agency's office, so that the client can get a true sense of the agency's culture.

The RFP process provides the means to help gain a better understanding of an agency's skills, credentials, processes, culture, and team, as well as the client's business opportunities, expectations, values, and requirements.

### Finalist Phase

*The "finals" review phase should include the pared-down list of the best two or three agencies from the RFP phase. It should provide the opportunity for the client to engage with the agencies and allow participants to assess the potential partnership.*

- All finalist briefings should be in-person meetings.
- The finalist assignment may range from answering a strategic question or addressing a hypothetical challenge to requesting full speculative strategic, creative, and media work.
  - ▶ Depending on the client's requirements, the agencies' past work may provide the best example of how they work in a day-to-day collaborative relationship.
  - ▶ If the decision is to do a speculative creative process, it will require a greater time commitment from all parties.

Finalist agency briefings should be as complete and comprehensive as the assignment requires. If the finalist phase includes a speculative assignment, the information should include everything necessary for the agencies to complete the assignment successfully.

### Guidance Summary

*Agency selection is an important strategic decision, and briefings matter.*

Each phase of the review process creates the opportunity to expand the interaction between client and agency teams. Briefings matter. Best practice agency selection briefings enhance the likelihood of selecting an appropriate and culturally compatible marketing partner.

# Agency Selection Briefing Guidance

There is a broad range of briefing considerations at each stage of the agency search process. In order to help ensure a successful agency review process, the ANA and 4A's have partnered on the co-development of briefing suggestions, including guidance on the types of information that should be included in the RFI, RFP, and finalist phases of reviews.

Details of ANA/4A's briefing guidance for major review phases are provided below.

## 1 Initial List/RFI Phase

*Think of the RFI phase as the ability to collect information that will help you preliminarily qualify a list of agencies for the final selection and eliminate agencies that don't meet your criteria.*

Just as an advertiser should ask itself how much information it really needs from the agency in order to determine if they have the ability to help address the brand's challenges, an agency needs the right information from the client to determine if they can/should respond to the RFI. If an agency decides to respond, they will need to obtain enough information to answer the RFI effectively and position themselves for success.

### When and why would I want to engage in an RFI?

An RFI might not be necessary if you:

- Need to find an agency, and are working under a tight schedule
- Know the agency landscape well enough
- Are clear about which agency you might like to engage

If you are comfortable identifying a short list of agencies to include in a review, it's possible you'll want to skip right to the next step, the RFP.

However, if you don't know much about whom to consider, or have no idea where to start, an RFI is an important step in the process of identifying the right agency partner. An RFI gathers basic information about many agencies (no more than 10 to 15), which you can use as guidance to arrive at a short list of agency candidates (typically six to eight) to invite to the next stage of your selection process.

An RFI is a standard set of questions that helps introduce each agency while giving you the ability to better understand their unique capabilities. RFI answers typically consist of basic information, like agency ownership (holding company or independent), size, number of employees, location of offices, capabilities, general philosophy, potential competitive conflicts, and other major distinguishing characteristics.

At this point, you're not asking the agencies to do any customized work beyond introducing themselves; the request is for information they already have on hand and are prepared to share in response to any sort of new business inquiry.

Use the RFI to help narrow down options by enabling you to eliminate agencies that are not likely to be a good choice for further consideration because they don't meet the criteria you've established for a future agency partner.

It's important to recognize that agencies today are becoming increasingly more selective about how they manage their resources and invest their time and talent to pursue new opportunities. In consideration of that reality, it's good practice to share with the agencies enough information about the company and the brand, the scope of your search/review, and

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your expectations as a client at the time of your RFI distribution. This will allow the agencies to make an informed decision about whether this is a good fit for them, or address a potential conflict. Providing agencies with some basic information about the opportunity helps them make the right decision about whether to participate, positions them to respond most effectively to the questions in the RFI, and begins to position you as a client that understands and respects the agency/client relationship as a “two-way street.”

### What information should a client provide in an RFI?

- Overview of the company and product/service offering
- Objectives/reasons leading to the review/search
- Geography of the assignment (e.g., U.S. only)
- Brands/products included in the review
- Scope of agency services desired. For example:
  - ▶ AOR or project
  - ▶ Creative
  - ▶ Media
  - ▶ Digital
  - ▶ PR, social
  - ▶ Other services (describe)
- Out-of-scope services (to avoid any confusion)
- Samples of current work (via links if possible)
- Your estimated annual advertising budget range
- Approval process, timetable, and ballpark budget (if any) for the review
- Existing agency roster information, including the length of relationships (if relevant)
- Key contacts and protocol for communication
- Any critical requirements (e.g., competitive conflicts)

### What information should a client request in an RFI?

- Ownership/location(s)/headquarters
- Agency’s mission — what differentiates them
- Years in business
- Number of employees (by department if appropriate)
- Name and contact information for key contact
- Client list (active), scope, and length of relationship
- Recent (past two years) account wins and losses
- Agency leadership bios
- Core capabilities and service offerings

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- Areas of expertise, with a focus on the brands/products in review
- Relevant awards and recognition
- Relevant work samples/reel/links
- A small number (three) of relevant case studies. These should not be proprietary. The case studies should be similar to what an agency would include on its website.

Use the RFI to eliminate agencies that don't meet your predetermined criteria, and garner the most qualified six to eight from the longer list of the 10 to 15 who received the RFI.

## 2 Semi-Finalist/RFP Phase

The RFP process will clarify the client's expectations, and provide assurances from the agencies that they can handle the project/assignment on the client's timetable and terms. It will also provide additional information about an agency's unique capabilities relative to the client's specific situation and challenges in order to select agency finalists.

While the RFI should be "off the shelf" material and require a minimal investment of agency time, the RFP requires a greater investment of both client and agency time. Accordingly, at this point the client needs to provide more in-depth information to allow the agencies to customize their responses and provide more information about their appropriate experience. This is also a good time to begin assessing the cultural fit between the two companies by asking questions that allow an agency to further highlight what it thinks makes them different.

It is best practice to implement a mutual NDA/confidentiality agreement prior to the receipt of the RFP. (Note: In some cases it might be beneficial to implement a mutual NDA/confidentiality agreement prior to the RFI stage.) If speculative work is to be included in the review process, there should be agreement on ownership and usage rights of new business/agency search ideas and work.

*Think of the RFP as an opportunity to learn which agencies you want to include in your list of finalists, after selecting the best-qualified candidates.*

### What information should a client provide in a written RFP?

- Reason for proposal
- An overview of the company
  - ▶ Business
  - ▶ Company culture
    - What does your company value?
- Timeline/scheduling of RFP process
  - ▶ Possibly include post-RFP requirements (if needed)
- Instructions, including directions on how to submit answers to the RFP
- Background
- Business situation

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- Advertising history
  - ▶ Past advertising history
  - ▶ Who is the incumbent, and are they participating in the review? (Just as you need to know your competitive landscape in order to determine your go-to-market strategy, so does an agency.)
- Reasons and goals for the review
- Describe the client's service expectations. For example:
  - ▶ Campaign creative development
  - ▶ Production
  - ▶ Media: planning and/or buying
  - ▶ Research
  - ▶ Trafficking
  - ▶ Agency staff requirements
  - ▶ What role will you want the agency to play — e.g., will you expect the agency to work with other agencies? What will the framework for that be?
- Current work examples (with links to work)
- Understanding of competitive environment
- Brands/products included in the review
- Expectations/scope of the review
  - ▶ New campaign or promotion
  - ▶ Brand-centric or product-centric
  - ▶ Clarity on the deliverables for the review and agency selection criteria
    - Spec work
  - ▶ Compensation/stipend for spec work
- Your estimated annual budget(s):
  - ▶ Paid media
  - ▶ Production
  - ▶ Agency remuneration
- Compensation method preferred
  - ▶ Retainer
  - ▶ Fixed cost per project
  - ▶ Hourly plus expenses
  - ▶ Commission
  - ▶ Production mark-ups

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- Selection procedure
  - ▶ Client team and decision maker at each stage of the review (It is important to have senior decision-maker continuity throughout the process.)
  - ▶ An overview of the decision-making process for the review (This can be a phone conversation if the client is not comfortable putting it in writing.)
  - ▶ Selection criteria
    - “Report card” or method of grading
    - The overview of the decision-making process could include:
      - ▶ Agency meeting objectives
      - ▶ Related marketing and advertising experience and capabilities
      - ▶ Related branding experience and capabilities
      - ▶ Uniqueness of concepts
      - ▶ Experience with category-related accounts
      - ▶ Depth of industry knowledge
      - ▶ Team members with agency for more than two years
      - ▶ Team members with experience within the client’s industry
      - ▶ Agency history
      - ▶ Qualifications of agency staff
      - ▶ Practices set to ensure a consistent quality of work
      - ▶ Systems in place to deliver needed product in a timely manner
      - ▶ Financial stability
      - ▶ References
    - With the turnover rate in the business, it is critical that the client select the whole agency, complete with its values, staff, orientation, operations, ownership, and culture — not the handful of people who have participated in meetings during the business review.
- Remuneration budget for review participants (if any)
  - ▶ Provided to finalist agencies to help defray costs
- Ongoing client-agency performance evaluation
  - ▶ Key areas of performance, improvement, scope, process, compensation

### What information should be requested in an RFP?

(\*Denotes information that was already possibly provided by agency during RFI stage)

- Ownership/location(s)/headquarters\*
- Agency’s mission — what differentiates them\*
- Years in business\*

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- Number of employees (by department if appropriate)\*
- Name and contact information for key contact\*
- Client list (active), scope, and length of relationship\*
- Recent (past two years) account wins and losses\*
- Agency leadership bios\*
- Core capabilities and service offerings\*
- Areas of expertise, with a focus on the brands/products in review\*
- Relevant awards and recognition\*
- Key personnel (beyond leadership) — the senior team that is designated for the assignment and their bios
- Agency's approach to strategy and creative development
- Case studies (three or four) that answer specific questions about experience relevant to the client situation
- Relevant work samples across channels that will be part of the assignment, with links to the work
- Experience, with examples, of working with other agency partners (if relevant)
- Agency's perspective on why they think they're a good fit and why they want to be involved in the client's business
- If a marketer's business operations entail unique process capabilities or risk management expectations, then the RFP might ask the agency candidates to provide information related to those expectations, e.g., data protection policies, technology capabilities, or insurance coverage

### What information should a client *not* request in an RFP?

- Ideas to solve the client's business problem
- The agency's strategic/creative ideas on the brand's current situation
- Any video that requires the agency to create, shoot, and edit original material
- While a request for the agency's compensation philosophy is acceptable, it is not appropriate to ask for a rate card or compensation information specific to the engagement at hand.

This information should be gathered further along in the process when the client and agency meet face to face and have more in-depth conversations about the client's situation.

### Semi-Finalist Meetings

Many reviews include semi-finalist meetings as a transitional step in narrowing the contender list from the six to eight agencies that receive the RFP to the finalist group of up to three. Semi-finalist meetings are often referred to as *credentials* or *chemistry* meetings. Regardless of the nomenclature, when a review process includes these sessions, there should be advance discussion of the goals and expectations as well as thorough briefings.

The purpose of chemistry meetings during the semi-finalist phase of the review process is to help the parties gain a better understanding of an agency's skills, credentials, processes, culture, and team, as well as the client's business opportunities, expectations, values, and requirements. Semi-finalist meetings should be more than a discussion of credentials. These meetings are an opportunity for both client and agency to discuss and assess compatibility. Ideally, the chemistry sessions reflect a two-way dialogue that includes joint sharing of information and interaction between the client team and agency team that will be working together.

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At this point in the review, the agency list should be pared to a more manageable number than the RFI or RFP. No more than four to six agencies are recommended in order to enable both the client and the agencies to become more immersed in the relationship.

The following briefing information can be provided via a scheduled phone call after notification to the agencies of the short list selection or in a written brief provided to the agencies immediately following notification. The agencies need ample time to prepare for the semi-finalist meeting.

### What information should be provided by the client prior to the semi-finalist meeting?

- Key objectives and expectations for the meeting
- More detailed information about the challenges that the company/brand faces and the expected goals to be achieved
- Client attendees and brief bios
- Specific elements of the RFP that earned the agency a position on the short list
- Areas of the RFP you would most like brought to life
- Areas of weakness from the RFP (if any) that you would like the agency to further address
- Criteria that need to be met to advance to the finals

*In some cases it might be possible to make the agency selection at this point, without requiring any additional phases in the overall process. For example, this might be the case when your selection process includes certain circumstances, like reviewing familiar roster agencies, seeking an agency for a project assignment, or having the need to expedite the timeline for an assignment. As a result, the RFP phase might be the concluding phase of the review.*

### What should be requested of the agency?

- Bring the team who will be key to the business.
- Deliver a sense of the agency culture (easier to accomplish if the meeting is held at the agency).
- Be prepared to discuss how the agency works with clients.
- Address the specifics from the briefing call or document regarding the RFP and additional context.
- Initial thoughts about the business and how the agency views the client's situation.

*Time allocated to a semi-finalist meeting should be between two and three hours. Expectations for the deliverables of the meeting should be in alignment with the time allowed. Ideally, these meetings should allow adequate time for agency and advertiser teams to interact and share experiences and expectations.*

### What information should *not* be requested in a semi-finalist meeting?

- Agencies should not be expected to provide brand campaign ideas and/or specific creative executions in chemistry phase meetings.

In order to get the best read on the chemistry makeup, make sure to include meetings at both the client and agency locations. The ANA/4A's [Guidelines for Agency Search](#) strongly advise clients to visit the agency candidates in their

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offices at some point in the review process, and the semi-finalist meetings are the most appropriate stage in which to do so. The goal is to get a true sense of the chemistry between the two parties and for the client to better understand the agency's culture. Cultural compatibility is an extremely important ingredient in creating enduring agency-client relationships. Appendix 2 to the ANA/4A's 2011 [Guidelines for Agency Search](#) includes helpful information related to cultural compatibility.

### 3 Finalist Phase

At this point in the review, the list should include the best two or three agencies from the RFP phase. This finalist phase assumes an assignment of some kind. It is important to tie this assignment to the overall reason for the search, whether it is a new strategic solution, a new campaign platform, a specific project deliverable, or a new agency relationship. The assignment may range from answering a strategic question or addressing a hypothetical challenge to requesting full speculative strategic, creative, and media work.

If the review includes a speculative creative process, it will require a greater time commitment from all parties for collaboration, and can tax company resources on both the client and agency side. It is also good practice to discuss token stipends, which help to partially offset an agency's cost of participating in a review. Usage rights to the speculative creative are not included in the stipend, and a discussion on fair value should take place separately.

Depending on the requirements, the agency's past work may provide the best example of how they perform in a day-to-day collaborative relationship. Through this, a client can discuss previous campaigns and goals, along with solutions to the business problems at hand.

No matter the assignment, all finalist briefings should be in-person meetings versus conference calls or written briefings. Furthermore, if the finalist briefing process features group sessions that involve all agencies, then separate breakout sessions should also be scheduled that provide the opportunity for individual briefing discussions with each finalist agency.

It is also important to clearly set the expectations of the assignment and treat all agencies equally. As an example, you can learn a considerable amount about an agency by the questions they ask. Ensure a fair playing field with your agencies in handling questions. Some marketers disseminate a question from one agency to all selected agencies and distribute their responses to all participants. The downside to this approach is that many agencies will be reluctant to ask strategic questions for fear of revealing to competitors a planned approach to their presentation. Use your best judgment when circulating this type of material to the finalists. It is best to only circulate those questions and answers that clarify the assignment or process.

The review process should provide every opportunity to engage with the agency and continue the assessment of a potential partnership. If speculative work is part of the finalist assignment, best practices include scheduling work sessions prior to the final presentation. The more interaction the two parties have, the more likely the review process will end successfully.

The information provided to the agencies in the finalist briefing should be as complete and comprehensive as the assignment requires. If the assignment is a full speculative strategic, creative, and media assignment, the information should include everything necessary for the agencies to complete the assignment successfully.

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The following provides an example of the type of information that the client should provide for a finalist briefing:

### *The Business Opportunity and Challenge*

- The business objectives for the short and long term
- Prioritize top challenges and top opportunities

### *Industry, Category, and Competitive Overview*

- Industry growth and challenges
- Specific competitive information that affects short- and long-term success for the brand

### *Marketing and Advertising Challenge/Opportunity*

- An overview of the brand and its history
- Any research, qualitative and quantitative, that identifies ideal targets (primary and secondary), opportunities, shortcomings, attitudes, and brand health
- Any positioning or strategy work that has been done that would affect this assignment
- Marketing strategy and tactics previously used
- An assessment of past and present activity
  - ▶ What is working
  - ▶ What is not working
  - ▶ Why the activity has not been working
- The past marketing and media mix
  - ▶ Explain how the mix and level of investment evolved

### *Company/Brand Metrics and Benchmarks*

- Previous campaign goals and results
- Factors used to measure success
- Definition of what success will look like for the brand and company (this year, next year, and in five years)

### *The Assignment and What the Agency Will Need to Know*

- Expectation for agency finalist presentations of ideas, strategies, plans, or executions
- Criteria (importance ranking and weighting) for evaluating finalists
- The role, if any, that research and/or market testing play in your decision
- For media buying service reviews, if demonstration of buying cost-effectiveness is a component of the finalist assignment, precisely clarify buying guideline parameters, target audience, measurement, and efficiency standards that will be used to evaluate the agencies' buying effectiveness.
- Goals and objectives the advertising needs to meet (e.g., increase awareness of brand X by Y percent)
- Pre-existing commitments (media, sponsorships, etc.) that the agencies should know about
- Company's desire for change

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- Marketing investment levels
- Communications mix
- Key program metrics and targets

### *Rules of Engagement to Consider*

- Providing the agency open access (within reason) to client during the finalist phase
  - ▶ Protocol of how that interaction should take place
- Commitment of required parties to participate in work sessions with the agency during the spec/finals preparation process
- Client's position on agencies going outside the rules of engagement set forth (e.g., Will an agency be disqualified if they provide spec work when the direction states "no spec work"?)
- Level of detail (and degree of finish) deemed most appropriate for agency speculative work
  - ▶ Hold each agency to the same level of detail and degree of finish to ensure a level playing field

Concurrent with finalist briefings, the parties can consider initiating discussions on commercial contract terms. It is often helpful for the agency and client to exchange their standard contract templates, as that information would give the parties a head start when negotiations commence.

Your final brief should also offer non-winning agencies a debrief call at a later time to provide them with honest and actionable feedback on their approach, people, and final presentation, and to allow them to ask questions. The 4A's has a [Post-Review Feedback](#) tool that highlights important feedback categories and a ranking scale that can easily be adapted to online or telephonic debrief format.

## Guidance Summary

There is an opportunity to further improve the productivity of the agency search/new business process, for both agencies and advertisers, by developing specific best practice guidance tools around the subject of briefings throughout the review process.

- Every phase of a review requires a brief for the agency.
- Each review phase warrants different types and levels of client briefing information.
- As the review progresses, marketers should escalate the information that they provide to the agency participants and clarify the learning and capabilities expected.
- At each review phase, expand the interaction between the client and agency teams.

Agency reviews are costly and time-consuming for marketers and agencies. All parties benefit from structuring efficient and relevant briefing practices.

Agency selection is an important strategic decision. Briefings matter. Best practice briefing practices enhance the likelihood of selecting an appropriate and culturally compatible marketing partner.

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ANA and 4A's would like to acknowledge our members and staff whose collective experience and wisdom contributed to the development of this guidance.

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