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Agency Selection Guiding Principles

June 2025

Welcome to the Agency Selection Guiding Principles, a joint initiative between VoxComm, the global voice of agencies and WFA (World Federation of Advertisers).

"This is not just another addition to the existing literature and methodologies on finding the perfect business partner. Instead, it represents a departure from the conventional approach, encompassing key principles as well as processes.

The objective is to propose best practices aimed for partnership selection and move away from the traditional concept of "pitching", which is challenging to both agencies and clients alike, embracing a new mindset focused on selection. The time has come to rethink the pitch system and consider a more **structured, respectful, people-first** *approach to partnership selection.*

*This transformation, however, may require changes to the traditional approach. It calls for a shift in how we perceive and navigate the agency selection process. While change can be daunting, the rewards can be immense. Becoming a "**client of choice***" encompasses more than just the ability to lead an informed, inspired, respectful and transparent selection process. By adopting this approach, businesses can attract* **top-tier agencies***, foster* **stronger** *relationships that deliver* **stellar work***, and build a reputation for being an organisation that* **prioritises people***.*

We invite you to keep this document as a valuable guide in your business toolbox and use it as you deem appropriate. May it support you as you seek to streamline your selection process and lead to successful outcomes!"

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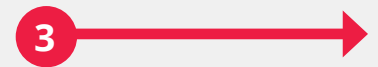Do I really need a new agency?

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Pre-Selection

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1

Analysing the requirements

Before embarking on the selection process, it is essential to thoroughly assess your existing partnerships and consider your future requirements.

To conduct a comprehensive internal review or informal survey, ask yourself and your teams the following key questions about your client-agency relationship:

● How is the current working relationship? Where do any issues originate (both parties need to be assessed and held accountable) and have steps already been taken to resolve any issues?
● Does the work currently meet your requirements and deliver against agreed KPIs?
● Do you already have an agency on your roster that can provide this service?
● Are you ready to change? Both internally (structure, ways or working, skills etc.) as well as externally (working with someone new?)

Changing your agency requires significant resource and effort and the following should also be first as an opportunity to fix existing relationships, with **9 in 10 WFA members focusing on issue resolution before pitching as a solution**[1].

Consider implementing a relationship management programme:

If you don't have a structured process in place to conduct regular health checks and reviews of the current agency-client relationship and output, consider implementing a relationship management programme. This is best practice and provides a platform for discussing the value exchange between the two parties – not just at a single point in time, but on an ongoing basis, focusing on continuous improvement. It is a process by which all critical aspects of the client-agency relationship are identified, periodically reviewed, and openly discussed to clarify expectations, raise issues (on both sides), define success, and optimise the working relationship.

Relationship re-sets and evaluation via a third-party consultant:

If the partnership between an agency and a client is analogous to marriage, inviting an external consultant to evaluate the relationship is the equivalent of going for marriage counselling. As with a marriage, this option can be tremendously productive and fruitful in situations where communication channels might have broken down or when a neutral, third-party perspective is required to deliver objective facts and advice. Working with an external consultant can offer numerous benefits, as they bring expertise and support to the existing relationship. However, it is crucial to be mindful of certain considerations. For example, beware certain external support (e.g. consultancies) who offer multiple services who may stand to gain financially from advocating a pitch. It is important to exercise caution when relying solely on one source regarding whether to proceed with a pitch.

no-pitch-pitch

Don't hesitate to have an open and honest conversation with an agency:

If there are issues with the relationship or the work, an agency would much rather engage in a tough discussion with a client than have an account put into review. As stated by one agency CEO, "None of us are that fragile."

Consider asking the agency for a fresh look at the client's business

Either with the existing agency team or with some agency personnel who have not previously worked with the client. If there is an issue with the people working on your business, ask your current agency to look within for a fresh thinking. Another option to consider is to hold a collaborative workshop that can help client and agency teams re-energise and think beyond the day-to-day work.

Additional options could include an in-depth look at the capabilities of roster agencies and running a chemistry or working session, a "pitch-in-a day" or a **"no-pitch-pitch[2]"**, involving the incumbent agency or existing rostered agencies tackling a pitch brief as if it was a brand new opportunity.

Allow enough time for real change to occur and for the agency to take on board any feedback, implement any changes, and allow a timeline to see results.

Changing agency partner can often be more time and resource-consuming than resolving immediate issues with your current partnership. With the average pitch lasting up to 6 months, the client and participating agencies will be committing to undertake additional work on top of their daily responsibilities. This in turn has led to many agencies becoming more selective as to who they want to work with, and clarity on why a client is running a pitch is more of a necessity than ever.

If you cannot find a resolution with your current agency partner, consider the learnings from your recent investigation into the decision-making criteria for your upcoming search. Clearly define the specific elements and deliverables that are crucial for your team to make efficient and effective decisions, while also being considerate of your current agency partner. If you believe there is a genuine possibility for your current agency partner to succeed in an agency review, you may benefit from including them in the process.

Despite the time and resource burn faced by pitching, agencies, in most instances, undertake this additional workload without receiving compensation unless they are ultimately selected for the project and, even then, it often takes many months for the agency to start earning a profit. It is important to be aware of and take into account local regulations and best practice around pitching, including pitch compensation.

Both parties should refer to the Master Services Agreement (MSA) which should address concerns about ensuring a seamless continuation of work during the pitch process as well as outlining the necessary provisions and protocols for a smooth transition to a new agency, safeguarding the continuity of operations.

2

Pre-Selection Preparation

The expenses associated with an agency search process can be significant for your organisation and the agencies involved. Such selection processes place immense pressure on all parties, especially considering the additional workload required on both agency and client teams. It is crucial to carefully consider the resources needed to facilitate a seamless and successful selection process carefully so this investment will prove worthwhile.

During the planning phase, it is key to recognise that the extent of agency services required across multiple sectors and geographies will directly impact the resources necessary for you and your teams to manage the following aspects effectively.

Building the Team

It is crucial to identify the internal stakeholders involved in the agency selection process and establish effective lines of communication. Depending on the size, significance and sensitivity of the business in review, key stakeholders may include finance, procurement, legal, IT, CMO, ESG function, and the CEO. It is important to clearly understand the internal team's availability and communicate the expected time commitments for participation at all stages of the process. Creating a comprehensive project plan can help ensure internal alignment and enable stakeholders to plan their involvement accordingly.

Build your selection team involving all relevant functions and geographies, remembering that the more you put in the more you are likely to get out:

- Marketing (including the CMO)
- Agency Management/Relations
- Procurement
- Finance
- Legal
- IT and/or Insights especially when the agencies need data access
- ESG

Roles & responsibilities

Consider drawing up a **RACI³** (Responsible/Accountable/ Consulted/Informed) chart to clearly designate the roles and responsibilities of each member of the team during the process.

Consider appointing a key decision-maker to involve the right people at the right time throughout the process, ensuring timing, budget, goals, etc. are consistent.

## Onboarding and aligning the evaluation team...

...at the beginning of the process may lead to an efficient and effective search for the advertiser and the agency.

The 4A's/ANA Cost of The Pitch survey revealed that "aligning the right people to complement their client-agency counterparts" was a key factor in helping reduce the need for incumbent agency reviews. It stands to reason that beginning a new client-agency relationship with the right people alignment is critical.

Therefore, from the client-side, it is important for the agency leaders to meet with key client decision-makers, as well as the day-to-day clients. Similarly, where possible, clients need the opportunity to meet the core agency individuals who will be working on their business.

External support / agency search consultants / intermediaries

Incorporating the expertise of an agency search consultant/intermediary can prove invaluable for a marketing team already facing significant demands when undertaking a large-scale agency search. A consultant is an advisor who offers valuable insights, best practices and guidance throughout the process. Their involvement enables you to develop and implement tailored evaluation criteria, ensuring the agency partners are assessed most effectively. By alleviating some of the workload and providing expert support, consultants often contribute to a more streamlined and successful agency search experience.
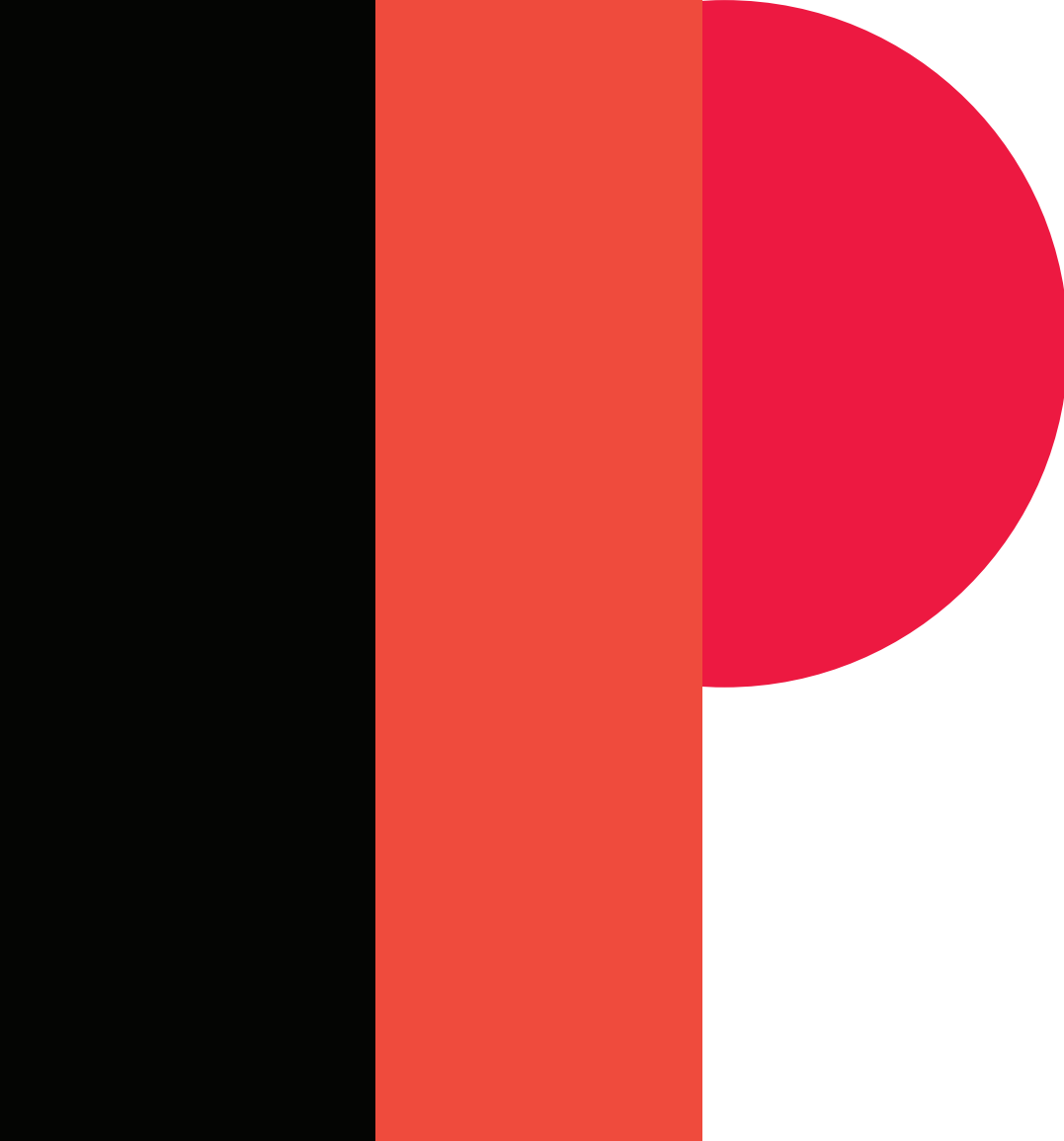
Time

While there are estimates on how long the selection process might take, it is impossible to make a prescriptive recommendation on timeframes as these vary based on the following:

- Services required
- Market coverage
- Teams involved and levels of seniority
- Approval process
- Selection format: In-person, virtual or hybrid
- Travel required
- Holiday*

Depending on the scale and scope of what is required for your business, consider how this might impact the time required across the entire process, from preparation to onboarding. Remember that everyone involved must continue to do their existing roles.

It is also important to align the scale of the process with the scale of the assignment. For example, a selection process for a smaller project should not require the same resources or length of time as a multi-faceted global retainer review process. Keep in mind that the time and resources required must be appropriate to the "size of the prize".

Paying for a pitch rarely covers an agencies cost. It is more a gesture than a reimbursement. Using the RFI stage to deep dive into talent and process and then selecting and paying an agency to work on a project is an alternative approach that could be considered.

*It is important to respect all holiday, not just official holidays. Agencies have been known to decline participation in a pitch that doesn't respect their staff's holidays and working hours. Equally, consider the day you issue your RFP and the day you ask for a response to avoid weekend working.

3

Ensure full stakeholder alignment

Before communicating your brief externally, ensure everyone involved in the process has signed off on it. Additionally, make sure there is internal alignment across the following:

● Alignment between marketing and procurement stakeholders because having common objectives may be crucial before communicating the brief externally. Priorities between these two stakeholder groups can often differ, ranging from a focus on top-line growth, incremental growth, profitability and/or year-on-year savings. Seeking agencies that can contribute significant value in these areas may be essential, depending on the needs of your organisation. Progress in this area is being made as shown through voluntary initiatives such as **Project Spring**[4], but navigating between often divergent priorities can pose challenges for agencies.

Project Spring

● The marketing and procurement teams will benefit from having open discussions about their priorities and what they deem important. This could include creativity, award wins, financial growth, innovation, consistent output, content generation, data and analytics, and programmatic capabilities. Equally, a **WFA study**[5] shows that 2 in 5 members have policies in place where they review and pitch agencies on a fixed set basis. Whilst for many this is a necessity, it is important to make sure that any pitch process must be aligned to a genuine business need also. This approach prevents time wastage for all involved parties. If there are significant changes on the marketing side, such as the departure and replacement of a key decision-maker during the search, or proceeding without a key team member, it is advisable to pause the search and recommence when the team is stable.

WFA study

● How will you evaluate the agencies on each level? Examples of important criteria for the agency to get to the shortlist level may include:
   o Similar or relevant client experience – x%
   o Recent relevant awards – z%
   o Team chemistry and alignment – w%
   o Feedback from existing clients – a%
   o Demonstrating strategic insight and understanding of the client's business objectives - y%

Consider keeping the decision-making criteria used to a minimum by focusing on a few key areas. This will help ensure that the team remains aligned on what is important to have in a new agency.

During the agency search, it is vital to be transparent about the factors that will drive decision-making. This signals to potential agencies that your internal team is aligned and allows them to focus on the aspects that matter most to you.

The goal is then to condense this information into a concise, disciplined brief.

What are your decision-making criteria?

Consider asking agencies for evidence across the following:

● Experience: similar work or projects previously completed by the agency that align with business needs as detailed in the brief
● Consistent methodology: a defined framework for achieving consistently high outcomes; and
● Thought leadership: relevant achievements, training of key individuals or the agency as a whole.

Additionally, asking the agencies to submit case studies that show work and experience relevant to the client is often an effective tool to understand best:

● How an agency applies its thinking.
● How the agency solves a specific challenge; and
● The impact/evidence of the results achieved.

Best practice to consider: Combine these into a scoring approach. See **QBS guide**[6] *Section 5, page 074 as an example (see appendix).* The pitch process and its deliverables must be structured to ensure that all the information needed to make a decision on who to appoint is provided but not ask too much of the agencies. Consider limiting criteria to a reasonable number that allows this decision to be made.

How many agencies do you intend to review?

When moving from an initial request for information (RFI) long list to a shorter list at the request for proposal (RFP) stage, and finally to the final shortlist for more detailed evaluation, it is important to consider the number of agencies you wish to assess. It is only fair to invite agencies with a realistic chance of winning to move forward, considering the significant time, effort, and money they invest to participate in a pitch.

Only inviting agencies with a realistic chance of success should be a special consideration when inviting agencies to participate based on client DE&I goals and or compliance objectives. Diverse owned and operated agencies may be included in pitches to meet certain client DE&I requirements or as a "tick box" exercise and miss out on winning due to a capability mismatch. It is important to understand any agency's capabilities and scale before inviting them to pitch to ensure that no businesses resources are unnecessarily drained.

What is the budget?

Financial components you may want to consider:

● Value of the business/account
● Search cost
● Consultant fees (if any)
● Price/value of IP
● A contribution to agency time costs especially if you are asking for bespoke deliverables
● Contribution to third-party agency costs, including travel and subsistence*

Clients should be aware that any payments made to an agency to cover costs associated with participating in a review or pitch process are usually intended to reimburse expenses. These payments do not entitle the client to any rights to any creative work, concepts or materials presented by the agency during the review. Unless expressly pre-agreed (ideally in writing) and paid for appropriately by the client, all such work remains the intellectual property of the agency.

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The selection process

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4

Briefing

EACA Cost of Pitching

The primary purpose of your brief is to provide agencies with clear and transparent information about your requirements, requests and selection process parameters. Being open and transparent lets you establish trust with potential agency partners right from the beginning.

Indeed, the 2025 **EACA Cost of Pitching**[7] revealed that clear briefing was the leading factor for a successful pitching experience; agencies need a well-defined and insightful brief that outlines objectives, deliverables, timelines, and expectations to deliver work that meets top-level requirements.

Depending on the individual needs of your organisation, the brief should include information on:

🎯 Business objectives & problem statements:

Incorporating these elements into the brief allows agencies to clearly understand the required tasks and showcase their expertise in addressing these challenges.

Additionally, while addressing the issues of today, consider briefing for the challenges of tomorrow. The more information you can provide in the brief, the better equipped agencies will be to propose effective strategies and approaches.

The creative/marketing goals – have you defined objectives and deliverables for the participating agencies, have all relevant stakeholders input to the brief? What is the scope of work and what will a successful outcome look like?
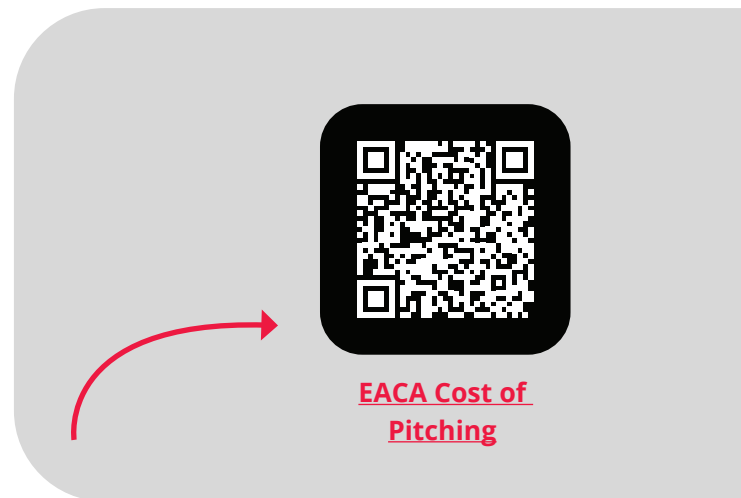
🐷 Budget:

Consider enabling agencies to make informed decisions about participating by being as upfront as possible on your planned marketing budgets and the business size. By providing upfront information on the marketing budget, agencies can accurately assess the project's scope and determine the resources required to respond effectively.

⚙️ Operational:

The type of agency engagement - retainer, project, roster of relationships, etc. (It is important to note that with this last type of engagement, asking multiple agencies to continue to pitch for each assignment (a jump-ball approach) can in some situations have a negative impact on the client-agency relationship.) Choosing the type of engagement may need to come before looking at which agencies to select for the selection process.

⚖️ Selection Criteria:

Offer honest insight on what you and your team value and how the process will be marked. If price is paramount, it's much better to be upfront about this. In the context of media agency searches, clarity in price statements is of particular significance, enabling agencies to align their proposals with your budgetary preferences.

Submission Requirements:

Consider a short focused RFI for your chosen list of agencies. Each question specifically addresses your needs and requirements to assess the agency's submission against them.

Requesting too much detail and/or irrelevant information in a proposal will not only put agencies off participation and cost all sides time and money. It is advisable to only request the necessary details since your team will need to read and analyse the information. Chemistry is an essential part of any pitch process. The only real way to gauge the culture, ways of working, and energy of an agency is to meet in person, ideally at the agency's office. It is also an indication from the client that they are willing to invest their time and resource into a pitch.

Submission Formats:

Automated, uniform response templates and systems allow for a more streamlined process at the initial stages, where information required is likely to be more functional. Offering an element of flexibility in response formats allows agencies the room to come back with proprietary questions and/or case studies showcasing their qualifications.

Consider NDAs:

NDAs are aimed at protecting both parties' confidential information and provide trust and reassurance on both sides. However, NDAs may need to include provisions that allow the client or agency to seek guidance, support and advice from outside stakeholders, such as trade organisations or industry bodies, and consultants where relevant. This ensures that they can access valuable resources and expertise without compromising confidentiality.

Align with the participating agencies, including any incumbent(s) and any agency search consultants intermediaries, if involved, on whether the press can be informed of the agency selection process itself. It can be good practice to prepare a press release pre-emptively to ensure a quick response should news of the process be "leaked".

5

Respect mutual confidentiality

Expertise and insight are what agencies sell to their clients and how they compete. You should avoid sharing insights or proprietary questions (or your responses to them) from one agency with others. What may be appropriate to share are questions and answers related to procedural or structural aspects of the process. Also consider the amount of access you will allow agencies to your team to ask questions. The more time a client can dedicate to the pitching agencies to ask questions and receive feedback the higher the likelihood is of receiving pitch responses that answer the brief given.

6

Ensuring a fair process

Whether it's strategy, creative or media, the "client of choice" will always demonstrate that they value the agencies' time and expertise. The goal of agency selection is to select an agency partner who can consistently deliver the expertise required by the business across a thoughtfully managed process. The selection process should be based on the ability to assess the evidence of expertise, instead of speculative creative media plans and strategic work. You want to stress test the contenders with a "live" brief in your critical areas of focus (depending on the discipline) to find out if they can help grow your business in the future.

When requesting consulting, strategy, media, or creative recommendations, ownership can become a concern when speculative work is submitted, whether requested or voluntarily provided by an agency participating in the selection process. Depending on the needs of individual organisations, this type of concern can often be alleviated if the client pays the agency an appropriate fee to own the work. In most other cases, the work should remain the property of the agency.

7

Assessing compatibility

Expertise should be the main consideration. Make sure you review agency submissions against your decision-making criteria and score on the evidence that they can deliver against your needs.

8

Positive pitch behaviours

Compatibility, not chemistry. This is not quite about the intangible je ne sais quoi of a first date but to see if there's a shared ethos, mutual respect, and an aligned perspective by which both parties approach problem-solving and business challenges. It's similar to a job interview, where you assess both sides' collaboration abilities.

Having identified your finalists, the purpose of interviews and compatibility sessions is to assess their claims of expertise further and provide the evaluation team with a deeper understanding of the agency's qualifications, culture and ways of working. This is also the opportunity to go beyond the submissions by the most qualified agencies to understand more about your potential partner and if you can achieve brilliant work together.

Correctly applied, interviews and compatibility sessions, whether in-person or via video, can go a long way towards establishing the confidence that your agency partner has the experience and expertise to support your objectives as well as a shared ethos, approach, appetite and ambition to achieving the common goal.

● Understand the thinking behind the work: get into the 'whys' and the 'how's' of the agencies' approach, methodology and thinking.

● Each party shouldn't be afraid to ask the hard questions. For example, the client team may ask how has the agency handled challenges in the past? How do they approach conflict?

● The intention is not to provoke but to respectfully address sensitive issues, where relevant, to see how the agency responds to being challenged and the openness with which they are prepared to engage you and your teams. The agency also has an opportunity to interview the client too, which means answering questions with a similar level of openness.

● Consider sustainability: avoid unnecessary travel. By making mindful choices and leveraging technology, you can reduce your and the agencies' carbon footprint while maintaining effective communication and collaboration.

● Initiatives such as ISBA-IPA's **Pitch Positive Pledge**[8] and 4A's/ANA's **Cost of the Pitch**[9] outline how important positive pitch behaviours from both parties in the early stages of a process are in the short term, as well as how they can impact the longer-term client-agency relationship.

Pitch Positive Pledge

Cost of the Pitch

9

Negotiations

Prior to appointing or making the final decision known to your preferred partner, you may want to consider negotiating the full contract arrangements that reflect fair and rewarding terms for both the client and the agency. Work with procurement and any consultants you may be working with to agree on overall terms, including budget, basic remuneration and IP ownership, and negotiate with your top contenders.

When considering payment terms in your negotiations with potential partners, it's important to remember existing industry best practice and the impact on your agency and its partners and suppliers. On average, 'standard' payment terms tend to be between 30 to 60 days, but this shouldn't be a one-size-fits-all approach. In fact, negotiating payment terms may need to be a part

of your broader discussion when finalising commercial agreements with your selected partner, and not a competitive advantage. Do bear in mind the impact that longer payment terms can have. It follows from industry research that nearly a quarter of businesses are operating with extended 90-day payment terms, and in some instances payment terms of 120 days or more. This means that in some cases, work may have already been completed by the agency before any money lands in their account.

"*It cannot be in clients' long-term interest, when reputation is so critical to ensuring you can work with the best possible talent, to unfairly extend payment terms*" – Stephan Loerke, CEO, WFA **(Global agency remuneration trends 2022)**[10]

10 ⬤

Feedback

A significant amount of time will have passed from the initial kick-off to the final selection, and for the agencies not selected, who have committed time and resources to pursue your business, the news that they have not won the account will be disappointing.

Agencies invest a tremendous amount of time, energy, and money in a review, as indicated in the 4A's/ANA **Cost of the Pitch**[11] report. Each review should be a chance for the agency to understand what they could have done better and how their approach and responses can be improved for future opportunities.

It is respectful and appropriate for clients to provide timely, actionable feedback at each step of the process. Feedback should be given either live or via video or phone, but that is particularly true after the finals stage. At the same time, agencies need to respect the client's decisions at each stage of the process and not use feedback sessions as an opportunity to try to change the client's mind.

After the RFI phase:

● What the key criteria were that determined which agencies progressed and which did not?
● The main areas in which the agency fell short, and any areas in which the agency's response was not clear or distinct enough?
● Was there anything the agency could have done differently, or was the agency's response just not competitive?

After the RFP phase:

● What were the key obstacles in the agency's submission/meeting that prevented them from moving forward?
● What the key positives were in the agency's submission/meeting?
● Were there things the agency could have done differently which might have changed the outcome?

After the finals:

● What the key obstacles were that prevented the agency from winning the business?
● What were the aspects of the agency's work that stood out as positives?
● What might the agency have been able to do differently?
● Was team chemistry, agency-client team alignment and/or other talent issues of concern?

Incorporating a debrief into the search process holds several benefits, including the documentation of evaluation scoring and decision-making criteria by the evaluation team. This practice enhances the due diligence process, improving documentation and accountability for all parties involved. This will also be appreciated and helpful for the agencies not selected.

Awarding the Business

Decide on the winning agency as quickly as is reasonable and ensure that you are happy with all contractual and financial commitments with that agency.

Establish a structured procedure for notifying both the selected agency and those not selected of the decision. Tell the agencies not selected first, starting with the incumbent if they are not retaining the business. Ensure that all participating agencies learn of the results on the same day so that those not selected don't hear the bad news from someone other than the client.

Understandably the agencies who have not been successful may need some time to let the news sink in. It can be good practice to provide the initial decision to the senior agency person working on the pitch in the first instance, and then provide a proper debrief session after a few days when the agency has had time to collect their thoughts and to allow them to fully absorb the client feedback.

To address the concerns of clients and agencies who prefer not to disclose any information until the review is complete, consider developing a clear press communication strategy. This strategy may need to consider whether, when and how information about the selection process will be communicated to the public and the press.

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Transition

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11

Offboarding and onboarding

Plan sufficient time and resources to ensure an empowering induction for the new agency and a well-managed handover from the previous agency. Manage your expectations and build in a sufficient buffer to allow for a well-paced transition. If a search consultant or intermediary led the pitch, consider engaging them to some extent in the transition.

● Lead from the front – don't leave this to the agencies to manage. The need to lead cannot be underestimated. Being involved in the process will establish a culture of leadership and allow you to set the tone for future engagement with the new agency.

● Consider prioritising and clarifying the scope of work for the first few months so agencies can plan accordingly.

● Give yourself and the agency enough time to on-and-off board team members. The offboarding time will typically be included in the incumbent agency's MSA, however, the new agency needs to be given an appropriate amount of time, not just to onboard but to fill each of the roles you have agreed with the right talent. Consider:
- o Recruitment Times: Good talent, especially in specialist skills or senior roles, are harder to find than ever.
- o Notice period/gardening Leave: While notice periods worldwide vary, senior talent generally have longer notices to serve out.
- o Ramp up and onboarding: As much as new joiners commit to hitting the ground running, it will require 3 to 6 months before they are truly embedded in the business and familiar with the work.

● Consider the challenges of transitioning remotely. With a decline in post-pandemic business travel and carbon-conscious company policies looking to reduce corporate travel, how do we navigate the important milestones remotely?

Parting with long-standing communications agency partners remotely can be a challenging process since, ideally, such significant transitions are traditionally conducted face to face. However, in situations where remote communication is necessary, the following steps can help ensure a smooth and professional parting:

● Schedule a virtual meeting: set up a video conference to discuss the termination.
● Notify in advance: inform partners about the purpose and the need for the discussion.
● Express gratitude: begin with appreciation for their contributions.
● Discuss transition: address practical aspects, such as timelines, ongoing projects, and financial matters.
● Address concerns: allow partners to share their thoughts and questions.
● Contractual agreements: review termination clauses and legal aspects.
● Knowledge transfer: plan how data and assets will be transferred securely.
● Maintain professionalism: keep the conversation constructive and professional.
● Follow-up in writing: summarise the discussion in a follow-up email or letter.
● Assist in transition: offer support during the transition.
● Plan for future collaboration: if possible, leave the door open for future cooperation.
● Maintain respect: ensure a respectful and diplomatic parting to leave a positive impression.
● Offer testimonials: if appropriate, provide written testimonials or references to support your agency partners' future endeavours.

How do you welcome, onboard and orient new agency partners remotely?

Although ideally, the key onboarding session would be in-person, in many cases, that is not possible. If conducting a remote onboarding session, here are some considerations:

● Attendance: ensure all relevant stakeholders are available to participate.
● Engagement: cameras should be on for all participants, if possible.
● Effective introductions: allow enough time for participants to properly introduce themselves and ensure clarity on each individual's role and responsibilities.
● Charting the course: key leaders should articulate the journey to come and the expectations for how the teams will work together.
● Establishing the channels: discuss communication styles and preferences (phone or video call, email, chat, text, etc.).
● Smooth handovers: plan transitions from one individual to the next after each introduction. (For example, the person speaking should identify the next speaker.)
● Alignment: be sure each team is fully up-to-speed on prior conversations and information exchanges, so no one has to repeat information unnecessarily.
● Towards the future: next steps and timelines should be clearly identified before the closing of the meeting.

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Cultivating strong relationships & the partnership principles

Start by considering a partnership agreement that outlines an agreed upon and efficient way of working together for mutual benefit and maximum success. Consider drawing up a 'moral contract' between the agency and client that goes beyond the commercial partnership and tangible deliverables to dictate how each will treat the other as partners.

To ensure a smooth transition, you may benefit from separating the transitioning and onboarding processes. Transitioning involves addressing the technical and logistical aspects of changing agencies, while onboarding focuses on rapidly familiarising the new agency with the client's business. Consider implementing 'immersion days' where key agency staff can fully engage with client stakeholders, visiting various locations, such as retail stores, factories, and corporate offices. This hands-on approach facilitates a deeper understanding of the client's operations.

Furthermore, consider open discussions about communication preferences. Determine the preferred methods of communication for key client stakeholders, whether it be email, text, chat, voice calls, or video calls. Clearly define what qualifies as urgent communication and establish protocols for handling such situations when the involvement of both the client and agency is required. It is important to avoid making assumptions and instead have a well-defined plan that explicitly outlines the communication expectations and procedures from both the client and agency perspectives.

By committing to a partnership agreement, implementing separate transitioning and onboarding initiatives, facilitating immersive experiences, and establishing clear communication guidelines, the agency and the client can foster a strong working relationship built on understanding, effective collaboration, and shared success. Best practice would indicate that engaging in a formalised client-agency relationship-management process can help ensure the longevity of the relationship.

Frequently Asked Questions

1 **Can I fix the issues at hand by changing my agency?**

Changing your agency partner is unlikely to lead to a solution if you haven't taken the time to truly identify and understand the issues at hand and what's causing underperformance. It will not put you in a position to address your business challenges and attempt to pave the way for future resolutions. There are two sides to every relationship, and, without correct scrutiny, it becomes challenging to pinpoint the exact problems.

2 **What are some of the reasons why a client runs a pitch?**

● **Some companies stipulate a mandatory review of suppliers at specific intervals (e.g. every three or five years)**

Such a stipulation often has roots in companies' procurement protocols, specifically the sourcing of commodities to benefit from economies of scale or potentially lower prices as production costs drop over time.

It is not recommended to apply this approach to marketing services, given that new marketing partnerships can take at least a year to settle and only start to flourish in the second or third year. There is also evidence from the APAC Agency Marketer Partnership Awards, to name just one, that well-established partnerships deliver the most effective work.

Depending on the needs and approach of individual organisations, a solution to this issue might be to amend existing company stipulations as above or to remove mandatory reviews of indirect procurement services or agency partners.

The need for regular audits is standard policy for governmental organisations but this doesn't always require a full-blown agency search, however, they can often also simply conduct due-diligence checks to ascertain that they are still getting value from the partnership.

● **Current agencies do not have the skill sets required and/or companies may be in need of new ideas**

Depending on the needs of your organisation, this may not necessarily be the reason to replace your current agency. Most agencies will endeavour to provide the services a client needs but may require some time to recruit and train the necessary talent. If this is the case, you may want to consider bringing in a specialist agency on a project or short-term basis while your current partners boost their expertise.

An alternative to consider is exploring your current agency roster for another preferred partner. Instead of immediately seeking external agencies, you can evaluate whether any of your existing agency partners have the potential to fill the skills gap or provide the expertise you require.

Another valuable option to check when considering agency selection is to engage with your current agency and seek fresh thinking or a new approach to your business, perhaps by asking some different talent within the agency to work on your business. Your current agency has likely developed a deep understanding of your business over time, making them well positioned to offer unique insights and perspectives. You can tap into their creativity and problem-solving capabilities by initiating a conversation with them about your evolving needs and challenges. This approach demonstrates your commitment to fostering a collaborative partnership and encourages your agency to think outside the box and propose innovative solutions.

● **Agency rates need to be reviewed to ensure that they are competitive**

While benchmarking has proven successful in direct-sourcing scenarios, it may not be as effective when evaluating agencies due to the unique nature of the talent, technology and services they provide.

Marketing investments are critical, tailored and complex, and often involve substantial costs and widely varying outcomes. You may want to consider different criteria or benchmarks for evaluating business solutions . Relying solely on billable and blended rates as benchmarking tools can risk commoditising hours without adequately measuring the quality of the work.

Instead, benchmarking total project prices or annual budgets can be a helpful approach during the agency selection process. Sharing these benchmarks with potential agencies can assist in defining the project's scope and aligning expectations. However, relying solely on hourly rates for benchmarking in a broader agency selection process can be counterproductive,since the agencies with the lowest rates may not necessarily be the most qualified. The primary goal should be to find the most appropriately qualified agency that fits within the total project price or annual budget that can be afforded.

When seeking benchmarking intelligence or support, it is valuable to leverage the industry knowledge, such as, for instance, the **WFA's voluntary ACI tool[12]**. Depending on the needs of your organisation, this can provide valuable guidance and help you stay informed about the advertising industry's latest trends and developments.

At the same time, the 4A's **Billing Rate Benchmark Survey Report[13]** provides aggregated and anonymised information about the hourly rates US agencies charge their clients. However, it's worth acknowledging that hourly rate compensation structures may not truly align with the complexities and partnership approach needed in your organisation or for your projects.

**WFA's voluntary
ACI tool**

**Billing Rate Benchmark
Survey Report**

● **Budgets have been reduced OR companies are looking at a reduced scope of work**

In today's dynamic business landscape, where conditions are constantly changing, it is crucial to recognise that reputable agency partners understand and appreciate this reality. Rather than subjecting both agency and internal teams to the pressures of an agency search process solely due to budget constraints, a more constructive approach may be to discuss with your existing agency partners the possibilities and achievements that can be attained with the revised budgets.

● **Companies may be rethinking/building their ESG strategy**

Many agencies have an approach to ESG service for their clients to varying degrees of maturity. Rather than calling the account into review, you may benefit from attempting to identify within the agency the appropriate ESG experts, who will often not be the day to-day account teams servicing your business. Additional support would likely be available for your business.

3 **If we include more agencies to participate, is there a better chance of a successful outcome?**

A great selection process isn't always about securing many agencies to participate but may also amount to identifying a smaller, qualified list of interested parties with a genuine chance of winning the business.

A process that involves fewer but more appropriately qualified and engaged agencies will often make the whole event more efficient and effective for you.

Engaging in meetings and screenings with an excessive number of agencies consumes valuable time and renders the process inefficient, while potentially driving up the costs incurred by the industry as a whole. There needs to be a balance of meeting a range of potential partners against being respectful of all parties' time and investment.

4 **When should senior leaders from both client and agency be involved in the process?**

Depending on the structure of your organisation, senior leadership should ideally be kept apprised throughout the process, especially at key milestones. It's increasingly common for the C-suite to feature in the pitch briefing process – they need to be on board and understand the ambition and goals of the pitch.

5 **Is it possible to run a quick agency search if I have a challenging timeline? Will this identify who is genuinely committed to securing my business?**

While it's not impossible to run an 'agency search in a day' as some companies are starting to prove, the smooth execution of an efficient selection process will most likely require a significant amount of time invested in pre-work and preparation. Data from the US indicates the average review takes about 3 months' time. Through its industry research, the WFA found that the average pitch can last anywhere from 2 months to 6 months **depending on the discipline[14]**.

However, it is key to remember that unrealistic timelines benefit no one, including the client. Given the current circumstances, with a reduced workforce and a growing emphasis on mental health and wellbeing, imposing unachievable deadlines adds unnecessary stress and pressure to everyone involved. In fact, it is entirely possible that the most suitable agency partner may opt out of participating in the agency review if they perceive the timelines as unrealistic.

6 **How can I ensure confidentiality whilst providing key details in the brief, including budgets?**

Confidentiality specifically means that you have the liberty to provide information on budgets. Asking an agency to sign a mutual NDA at the start of the process before releasing key brief details means that both client and agency will be able to exchange important information freely throughout the process.

7 **How can we use technology to allow for a more efficient process?**

Introducing digital innovation and online tools can certainly make for a more efficient process if introduced at the right part of the selection process. For example, online RFI forms might help to compile and collate the basic information that you and your teams require at the initial stage of the selection process, but as you move into the evaluation of expertise (and compatibility interviews/chemistry meetings), you may likely benefit from in-person meetings or video conferencing, human to human.

8 **When should I inform my incumbent agency that we will be running an agency review?**

This depends on the needs and culture of each individual organisation. Notwithstanding that, if you have a client-agency relationship management programme in place and have actively worked with your current agency to address any challenges, the decision to seek a new agency should not come as a surprise. However, it is still essential to provide them with the professional respect of informing them ahead of other agencies and offering them the option to decline participation in the selection process.

If you have already decided that your current agency relationship will not work out, then it may be best to inform them of the process you are running along with timelines to ensure that work continues as usual in the interim and to allow the agency to plan the transition of the business.

9 **During the pitch process, should I share all information with all the agencies participating to ensure an even playing field?**

While there is no one-size-fits-all approach, it is recommended to provide all agencies under consideration with the same information as presented in the brief. However, there is no obligation for an advertiser to disclose follow-up questions (along with their respective responses) from one agency to another. Such questions may contain proprietary information showcasing the agency's unique approach and strategic thinking. Sharing this information with all participants can give away an agency's competitive advantage. The review of agency questions serves as the initial interaction between the advertiser and the agencies, marking the beginning of their relationship. Keeping questions proprietary encourages agencies to be open and honest during this phase, allowing the evaluation team to initiate the evaluation process.

10 **Is conflict a bad thing?**

On the contrary, conflict as creative tension can be a great thing and often results in terrific work. You don't want 'yes' partners; you want an agency partner that will challenge you, defend their ideas and work, and push the envelope towards better concepts and business outcomes.

11 **What is the impact of extended payment terms on my agency?**

Extended payment terms may impact agencies' ability to do the best work for their client because it may be made more difficult for them to pay their people, to build or acquire new capabilities, to invest in research, and to retain and attract the best talent. Weakened agencies are detrimental to your best interests. Agencies usually have to pay their suppliers within 30 to 45 days, and by pushing extended payment terms on them, small suppliers suffer, which may be contrary to the advertising industry's ESG efforts.

12 **Should I expect a new agency to be prepared to hit the ground running and start ASAP?**

The chosen agency will likely need time and understanding to fully develop its team, whether enhancing its capabilities or meeting specific environmental, social and governance (ESG) requirements outlined in the brief. This could include fulfilling diversity, equity, and inclusion (DEI) targets or meeting sustainability commitments set by the client. It is a process that requires time and may necessitate additional investment in talent acquisition (with potential reciprocal impact on fees) to ensure the right individuals and specialists are brought on board.

Meeting these demands can be challenging under any circumstances, but it is particularly exacerbated by the current talent crunch faced by the advertising industry. Providing the selected agency with a sufficient and realistic runway to fulfil these requirements is important.

13 **New Year, New Agency – is one of the best times to begin a new agency relationship January 1st?**

This will depend on the individual needs of your organisation. Notwithstanding that, January 1 can be a challenging date to launch a new agency relationship because this then has implications for agency and client employees to work on the transition over the year-end holiday season.

This rationale also applies to any major festivals/religious holiday periods worldwide.

Be sensitive to the cultural nuances of your key markets and where your agency teams are located.

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