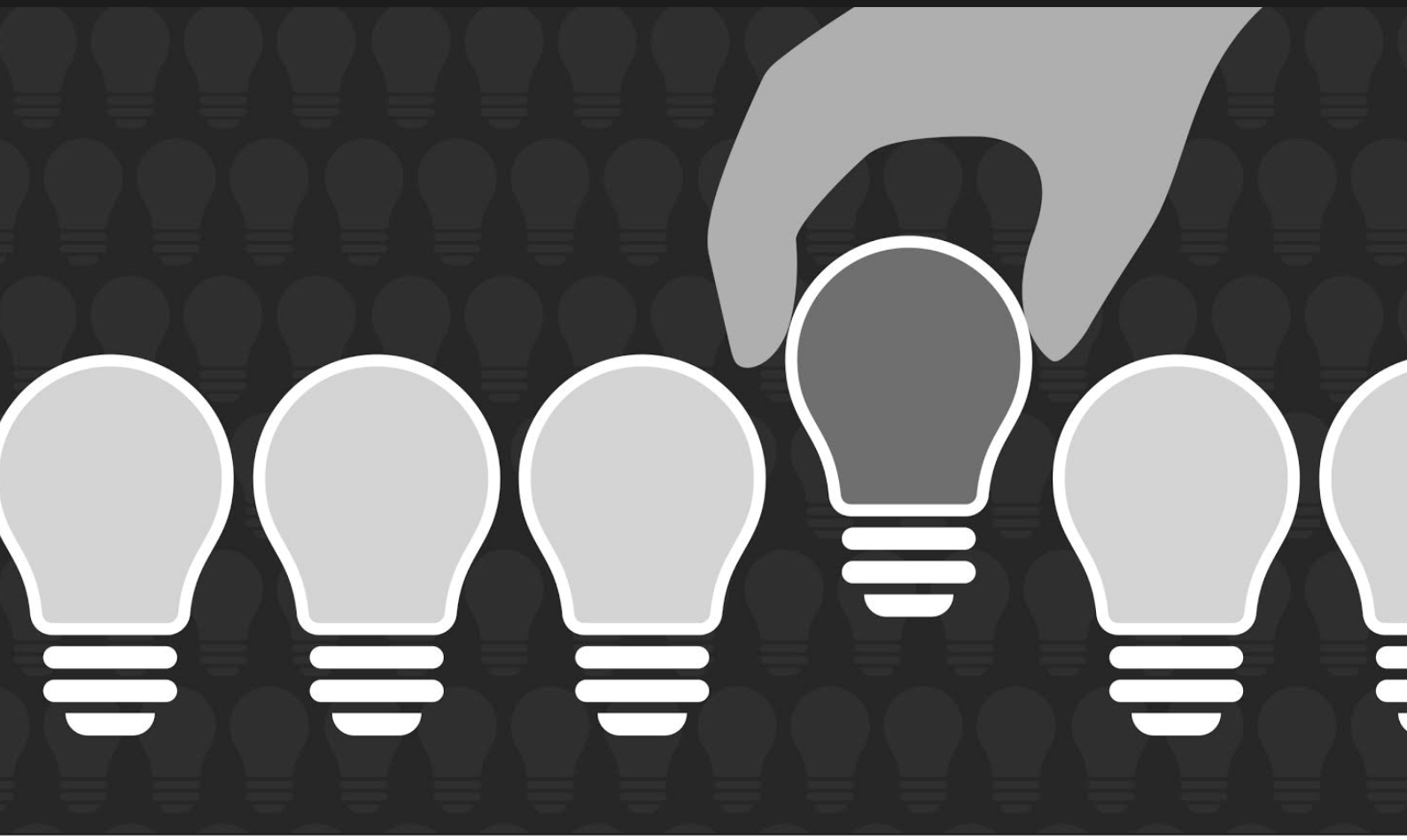
B2B Marketing™



BEGINNER'S GUIDE

Beginner's Guide to Agency Selection

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In association with

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To get the most out of a creative agency, finding one that you are 100 per cent happy with is key. It can make a big difference to your bottom line.

This Beginner's Guide has been put together to help you find the right creative partner, from longlist to final decision, and to maximise the value of your relationship.

The step-by-step guide provides useful tips to help you make informed decisions, save you time and avoid making expensive mistakes the next time you are in the market for a creative agency.

In addition, a practical score sheet template allows you to easily compare agencies like-for-like and takes into account the selection criteria that matters most to you.

A handy summary of the main points covered is also included, along with a useful list of further reading material.

A step-by-step guide to agency selection

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So, you're embarking on a search for a new agency. Perhaps you have never worked with one before or you feel that your current agency has lost its creative spark. Whatever the reason, selecting an agency can be a daunting exercise – in a crowded marketplace, it's often difficult to tell agencies apart. This step-by-step guide will provide you with a process to follow and options to consider the next time you're in the market for a creative agency.

1. Enlist the team

Before you start, ensure you have clearance from all stakeholders to embark on this selection process and agree who should be involved. The latter often depends on the nature of the requirement. A one-off project may involve members from other teams, such as HR if it is an internal communications matter, or you may require team leaders of departments if you are undergoing a rebrand.

Should you be in the market for an agency to deliver ongoing requirements for the foreseeable future, this would require involvement from senior stakeholders who fully understand the business and any history of agency relationships.

In addition, anyone with up-to-date knowledge of the agency industry, who can make an informed decision, will be able to reduce the amount of desk research needed. If your organisation has a procurement team, these colleagues should also be involved from the outset.

2. Write a brief

It all comes down to knowing what you want from an agency and setting these expectations. Are you looking for consultative problem solvers or an agency who will simply follow your instructions? What is the scope of the work? Is this a one-off project or a long-term contract? Whatever you're after, get full agreement from all involved in the decision making process on your requirements and the budget available. Use these to set clear criteria such as relevant experience, services, resource, location and cost – the importance of which is contingent on your business requirements. For example, if you are looking to break away from the norm, you may not consider sector experience as a prerequisite. While it's comforting if your agency understands your market and audiences, being able to bring in ideas from other industries should be a bonus.

Produce a written brief describing your business, your brand and your objectives and include a clear indication of your budget and the scope of work you'll be asking the agency to undertake. Communicating such expectations upfront will pave the way for a successful relationship.

3. Undertake research

An initial longlist can be put together by carrying out desk research; consulting online agency directories, league tables, awards and trade associations.

Online search engines will give you an abundance of results but can be especially useful if your search criteria are more specific, for example by location or discipline. Also talk to colleagues and peers about their agency experiences. Recommendations from trusted sources can often save you time sifting through the list of contenders.

Obtain the necessary background information from agencies' websites – a good website will provide you with an initial feel for the agency, their ethos, work, clients and team. According to IDG Connect, 56 per cent of time is spent on pure online research, 23 per cent talking to peers and colleagues and 21 per cent of time is spent talking to sales people.

4. Request proposals

Once you have a longlist of agencies that match the criteria in your brief, it's time to pick up the phone. Outline your objectives and services required and always make your budget explicit from the outset – it's never too early to talk about money. The agency will then be able to tell you upfront whether they can help you achieve your objectives while keeping within your budget.

In order to shortlist agencies for the presentation stage, request proposals that include credentials, relevant work carried out for other clients within the appropriate communications discipline and a cost estimate. Make sure you tick off prerequisites such as financial stability and staff turnover.

Other preliminary information to ask for at this stage includes how they would approach a project like yours, how they've helped others with similar issues and what makes them different from other agencies. Some agencies, particularly those local to you, should offer to meet you at this stage to discuss your requirements in more detail before they submit their proposal.

The template in this beginner guide provides a useful weighted score sheet for comparing agencies against your criteria. It can be applied either at proposal stage, once you have had the chance to meet the shortlisted agencies face-to-face, or in both cases. The template includes examples of criteria to measure – these depend on your business requirements and the stage of the selection process that the template is used for. For example, it can facilitate comparison of proposals taking into account your shortlist criteria. If used to evaluate the presentations, however, other factors such as chemistry will be more relevant. Simply allocate a priority value to each criteria to reflect its relative importance. Score the agencies according to how they perform in relation to the criteria and multiply this score with the priority value. The result is a single weighted score for each agency, which will help you to select the right creative partner for your business needs and thus maximise the value of, what should be, a long-lasting relationship.

5. Invite presentations

From the information supplied in the proposals you can now create your shortlist. Invite no more than three agencies for a face-to-face meeting to discuss the brief and get to know each other.

The format of this meeting completely depends on your criteria. If you are looking to compare their creative ideas in response to your brief, agree fees where appropriate to offset a fair proportion of agency costs and allow time between brief and presentation for the development of creative ideas.

Keep in mind, however, that without having had the chance to get under the skin of your business and target audience, at this stage agencies may not be able to provide creative ideas that result in commercial success.

Many successful agency appointments are based on reputation, personal chemistry, credentials and relevant work, as opposed to pitches. Whether you ask agencies for creative ideas or not, decide upfront how you will assess each presentation and invite all decision makers to be present. Also confirm with the agency if the team presenting will be the project team working on your brief.

6. Make a decision

Once you've had the chance to meet with each of the shortlisted agencies, you will be in a position to weigh up all remaining pros and cons, including one of the most important factors: personal chemistry.

While this depends on individual preferences, it is one of the key ingredients for a successful relationship. Before you appoint the agency of your choice, ensure that your senior management is on board, not just from the perspective of seeing the agency's website, but from having had the opportunity to meet them face-to-face.

Inform all shortlisted agencies of your decision on the same day and provide honest, constructive feedback to unsuccessful agencies. If required, ask your incumbent agency to hand over brand guidelines and other necessary files.

If you're still undecided or need extra reassurance, we recommend an ice-breaker: a small project for the agency to get started on, such as an internal newsletter or an infographic, to give them the opportunity to gain your trust.

Template: Agency score sheet

Simply allocate a priority value to each criteria to reflect its relative importance.

Score each agency according to how they perform in relation to the criteria and multiply this score with the priority value. The result is a single weighted score for each agency, which will help you to compare their overall performance.

Example criteria	Priority value	Agency A		Agency B		Agency C		Agency D		Agency E	
		Score	Weighted score	Score	Weighted score	Score	Weighted score	Score	Weighted score	Score	Weighted score
Relevant experience											
Client list											
Chemistry											
Services											
Resource/size											
Costs											
Location											
Total score											

Priority value
Priority values that work best are 0, 1, 3 and 5.
- 0 – criteria does not apply
- 1 – criteria is of low importance
- 3 – criteria must be met
- 5 – criteria is of high importance

Score
Agencies are scored independently of the priority.
- 0 – the agency doesn't meet the criteria at all
- 2 – the agency meets some of the criteria but all of it
- 4 – the agency meets the criteria
- 6 – the agency exceeds the requirement

Weighted score
The weighted score is the score multiplied with the priority value.

Key learnings

1. Make a conscious effort to introduce a structured selection process that enables you to choose and retain the right creative agency for your business. Agencies play a key role in promoting a brand and so can ultimately enhance profitability.

2. Ensure you have full buy-in from senior management and that key decision makers are involved in the process from day one to avoid any misunderstandings later on.

3. Decide upfront how you will assess proposals and presentations. Set clear criteria stating what you are looking for in an agency and which factors are less important, reflecting your business needs.

4. Always produce a written brief including your objectives, scope of work, key criteria and background information on your business and brand. This doesn't only make it easier to get internal sign-off but also facilitates informing the agencies you contact.

5. To find the right creative partner for your business it's critical to gain an up-to-date understanding of the creative industry and the range of different agencies out there. Carry out desk research using sources such as directories, league tables and associations. Also ask colleagues and peers for their experience and any recommendations.

6. Always make your budget is explicit from the outset. Likewise, ask agencies for a cost estimate early on in the process to avoid assumptions. Managing expectations and being transparent with shortlisted agencies will save you time and will form a foundation for a successful relationship.

7. Comparison of proposals, presentations and agencies' overall performance can be facilitated by using a weighted score sheet, taking into account your criteria.

8. Many successful agency appointments are based on other factors as opposed to the traditional pitch process.

9. Personal chemistry is one of the key ingredients of a successful relationship and so should be included in your criteria once you have had the chance to meet with shortlisted agencies.

10. When you have selected an agency, inform all those shortlisted of your decision on the same day and provide constructive feedback to unsuccessful agencies.

Further reading

- *Finding an agency – A best practive guide to agency search and selection*, AAR Group, Agency Assessments International, Agency Insight, The Haystacks Group, The Observatory Interna tional and Osytercatchers.
- *Sell the idea, not the service and who gives a **** about sector experience?*, Jim Piper
- *How to write a good brief*, Emma Craig
- *Beating Free Pitching*: *An Industry Approach*, Blair Enns
- *What is the Weighted Scoring Method?* David A. Zimmer
- *5 Common pitfalls in client-agency relationships*, Judith Jansen

B2B Marketing resources

B2B Agencies Report 2014
http://b2bmarketing.net/resources/b2b-agencies-report-2014

About B2B Marketing

B2B Marketing is the comprehensive information resource for B2B marketers. Its mission is to provide practitioners with the information they need to perform better and achieve more, whatever sector of the B2B space they are operating in.

Launched in 2004 as B2B Marketing magazine, it has since evolved into a multi-faceted resource, delivering a broad range of content in a variety of different forms and formats.

Its key products are:

Magazine: The essential monthly guide to B2B marketing, with a key focus on best practice guidance, plus monthly features looking at current trends, regular research and profiles.

Awards: The showpiece event for brands and practitioners, attracting over 800 people. Former winners include a host of top-tier B2B brands, including Amex, Barclays, Cisco, Dell, Fujitsu, IBM, KPMG, Nokia, O2, Oracle, Orange, SAP, Thomson Reuters, Vauxhall UK and many more.

Research and reports: A library housing the best in B2B practice, in-depth practical guidance and research into specific channels or industry issues.

Training: Comprehensive, integrated and flexible training programmes enabling client-side and agency marketers to boost their skillsets and confidence, improve their effectiveness and increase impact on their brand.

Events: Quarterly headline events providing essential learning and networking opportunities, including the B2B Summit, the Annual B2B Conference and the B2B Leaders Forum.

Membership: Become a member and receive all research and reports for free. You will also receive exclusive invites to members-only networking events, get discounts on training seminars, workshops and conferences and receive a subscription to the monthly magazine. There are different levels of membership available.

For more information on any of these products or services go to b2bmarketing.net or call +44 (0) 20 7014 4920

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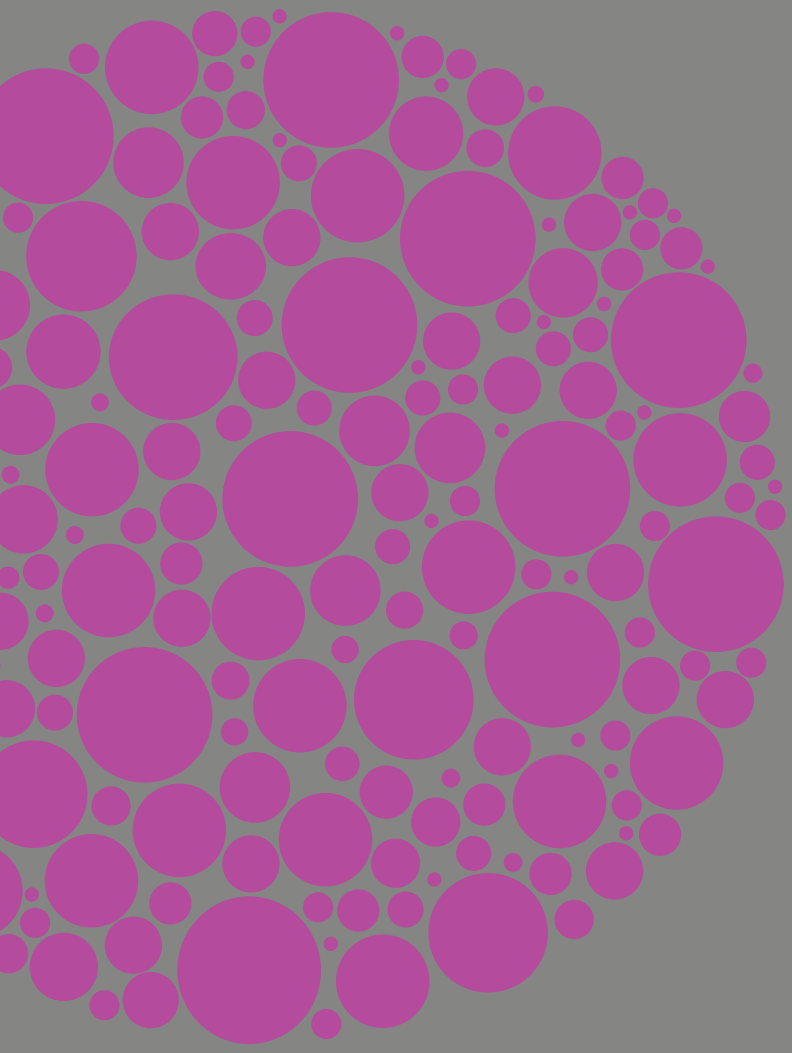
Corporate membership

B2B marketers have never had to be so multi-skilled, multi-tasked, and accountable to business objectives. Marketers need up-to-the-minute research, knowledge and insight to ensure they are not left behind.



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