

Choosing a marketing agency – a few top tips

The successful appointment of a new marketing agency doesn't happen by accident. You have to plan it says Martin Jones

For some companies, the prospect of finding and appointing a marketing agency could seem a little daunting. Where do you start? How do you know if you're talking to the agencies that are right for your business? And what is right for your business anyway? Is it their experience or cultural fit or, more importantly, both? For some people the whole process will fill them with dread – another task to be squeezed into an already overcrowded schedule. For others, it will feel like a great opportunity to bring fresh thinking and understanding to their businesses.

Wherever you are in the process, having the right mindset before you start the search will pay dividends. There are a lot of parallels between finding an agency and choosing somewhere new to live. Most people wouldn't dream of going into an estate agent and saying "Hello, I'd like a property, please".

The request begs too many questions. Are you buying or renting? Do you want a house or a flat? How many bedrooms? Do you want a garage or a garden? What local amenities are important? What is your price range? What about location?

Like most business projects, more research at the beginning will lead to a better brief and ultimately deliver the best result. And the process of finding an agency can follow the same basic steps as those you'd go through when buying a house.

1. First, decide on the sort of agency you think will suit you (size, location, type).
2. Start to narrow the search collating written specifications for those that are available and meet your initial criteria.
3. Once you've looked through these, you'll want to go and visit a few of them to see how they feel and whether you could be comfortable there
4. Finally, start to get some detail on how they like to

work, what they could do for you specifically and how much it will cost you. Then put your offer in.

Few people would consider tackling the housing market without help from a professional. In the same way, using a search and selection service will help you negotiate your way through the complex and ever-changing agency marketplace.

With over 30 years of experience, we've learnt a thing or two about appointing and working with agencies, so here are our 10 Top Tips to make the process as stress free as possible.

1. Before you start the process, ensure you have buy-in from all the relevant stakeholders.

There is nothing more frustrating than discovering half way through the review that someone in head office wasn't aware of it and is calling a halt to proceedings. Unlike some business projects, marketing campaigns are necessarily high-profile and everyone always has an opinion about advertising. Searching for a new agency to deliver a new campaign will almost certainly attract the attention of everyone in the business. So it's important to ensure the key players are comfortable with the plans and able to contribute to the brief and the final selection.

2. Be clear what you will be requiring your agency to do.

Define early on what you need your agency to deliver. Is it just advertising, for example, or will they need to manage other projects like direct marketing or digital?

It may seem like obvious advice, but in an increasingly convergent marketplace, the traditional route of appointing a roster of agencies to manage each individual marketing discipline may no longer be the right approach. With so many agencies now

diversifying away from their core offering, it makes sense to consider the agencies whose skill sets best match your marketing strategy.

Is it more important to find an agency that has worked in your sector before, or one that has managed a similar brand or product launch?

Try and plan as far ahead as possible. Unless you're looking for an agency to deliver a one-off project, you should be planning to work with the agency you appoint for about three years. Aside from avoiding having to go through the whole pitch process again, you'll find you usually get the best work from an agency that has worked alongside you over time - one that has had enough time to understand your brand, your products and your culture and with whom you've built up a good working relationship. It would also be very frustrating to go through a lengthy appointment process only to realise six months later that your new agency isn't equipped to manage the new product launch you're planning in 18 months time.

Have a think about relevant experience too. Is it more important to find an agency that has worked in your sector before, or one that has managed a similar brand or product launch? And check how up to date that experience is. If it's all represented by one director who has just left, it is not going to do you much good.

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Size may also be an issue. Do you want to be a big fish in a small pond or a small fish in a big pond? There is nothing more annoying for an agency than to be told that they hadn't been awarded the account because they were "too small" or "too big". The agency hasn't changed size during the pitch. The client just hadn't sorted out their criteria in advance.

Location might be another factor. Do you want an agency in your locale, or are you willing to go to the nearest major conurbation? Where are your other agencies based? It makes sense if they're relatively near each other if you plan to get them together on a regular basis.

Spending time on identifying the potential 'first list' of agencies is arguably the most important part of the process.

Having identified the agencies you feel can fulfil your brief you should arrange to meet them for a 'chemistry' meeting before you invite them to pitch. This meeting, usually held at their offices, is the best opportunity to meet the team in their home environment, see how they work together and ensure that they are the sort of people with whom you feel you could develop a good working relationship.

3. Prepare a timing plan and stick to it.

Work backwards from your campaign launch date and remember the more time you allow for handover and bedding in of the new agency the better. You can pretty much guarantee that the pitch process will take longer than you expect, so build in some slack time to cover diary clashes, holidays etc.

And be realistic, the whole process can take two or three months, so ensure the incumbent agency, if there is one, is given an appropriate notice period to allow for handover.

Once you've decided on your short-list and finalised the pitch brief, you should allow around four weeks from briefing the agencies to the final presentations.

4. Prepare a Press Release.

The agency world is notoriously gossipy. The moment that you start talking to agencies there is a distinct chance that the story will be leaked to the trade press.

You do not have to issue it, but having a press release prepared in advance avoids your story looking reactive and/or defensive. It also gives you the opportunity to put forward your reasons for the review - to highlight a new product launch or a change in strategy, for example.

5. Choose a manageable number of agencies to pitch.

We would normally recommend three or four agencies on your final pitch list. Don't be seduced into seeing pitches from 10 agencies in order to get 10 alternative solutions. Experience shows that not only will you find it hard to make a decision, but the agencies will not be motivated to participate when the odds are so stacked against them. Also bear in mind how much time the process will take.

Three or four is a manageable number that should allow you to spend enough time getting to know them before the pitch. It's good to allow time at the beginning of the process to meet with the agencies and answer any questions they may have about the brief. We'd also recommend a further working session shortly before the pitch to see how they have progressed. Sometimes agencies need to be steered back on course at this point, and it's much better to do this before the pitch than on the big day and in front of your chairman. The most successful pitches - and subsequent

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appointments – are those that most closely match how you usually like to work with your agencies.

6. If you invite the incumbent to repitch, make sure that it is because they have a fair chance of winning.

Ensure that every agency on the list could be appointed. Don't waste time conducting a 'beauty parade' including agencies for the sake of politics or worse, politeness. Pitching is extremely costly to the agencies in terms of time and money.

7. Issue a written brief, and give agencies access to all key decision makers.

The pitch brief needs to include everything that the agency should cover in their presentation. And if the MD, or other senior board members, are going to be part of the final decision process, make sure the agencies have access to them before the final presentation.

8. Decide on the type of pitch that you are going to have.

The traditional 'show & tell' of creative work is becoming less and less relevant. An increasing number of clients are opting for strategic presentations and/or creative workshops where they can get a feel for the way that an agency thinks and what they would be like to work with.

Remember the pitch is your opportunity to judge agencies on their thinking and cultural fit rather than simply on their ability to produce creative work. With only 10% of work produced at pitches ever seeing the light of day, it is arguably a more appropriate way of identifying the agency. Also have a think about the evaluation criteria you'll be using during the pitch itself and whether there is any weighting to be considered. For example – does the chairman get the casting vote, or is everyone's opinion equal?

9. Discuss remuneration in advance of the final presentation.

It can be very disappointing to fall in love with an agency only to discover that their fees prohibit their appointment. Ask the agencies to provide commercial

details covering estimated fees, staffing, day rates, studio costs etc. This will also allow you to compare the agencies against each other prior to the pitch meeting. Consider employing a marketing procurement specialist, who can help benchmark agency fees against an industry pool and assist in all stages of the final contract negotiation.

10. Never forget that it is a very subjective process.

In the end, most clients will give their business to the agency with whom they feel most comfortable. Ensure the process allows sufficient time for the key personnel to get to know the agency. Much like buying a house, you need to feel that you could spend time there. □

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