



## AGENCY SEARCH BEST PRACTICES: 10 "MUSTS"

Lee Anne Morgan & Partners and Alan Krinsky Associates have a combined experience of more than 40+ years in conducting agency searches for marketers ranging from mega global corporations to smaller, domestic, and entrepreneurial advertisers.

Here are 10 "Musts" that we consider Agency Search Best Practices. We have not only pioneered the application of these, but we continuously seek to improve upon them when we conduct or advise on an agency search:

### THE FIRST 5 "MUSTS"

- 1. AGENCY KNOWLEDGE:** Know the depth and breadth of the agency marketplace. Know where the talent is and where it is going. Not an easy task with client movement, talent shifts, and, often times, senior management instability.
- 2. MARKETER EXPECTATIONS AND NEEDS.** Provide a clear statement of your *real* needs and expectations of a new agency partner. Share this with the candidate agencies. This is your criteria and the foundation for agency selection. Obtain sign-off on this document from all internal and external stakeholders.
- 3. YOUR AGENCY RFP:** Keep it simple. Make it relevant. Address the 'expectations and needs'. Do not ask for information that can be easily obtained later *if* it is needed at all. This aspect of agency searches today is terribly, terribly broken and must be re-evaluated.
- 4. SCOPE OF WORK.** The Year 1 SOW for your new agency should be a "precision" document that requires more detail than we usually see from clients. This is The Document upon which both agency talent and economics will be based. Issue this early in the process so the candidate agencies know exactly what work, when, how, and to what degree of complexity will be needed from them.
- 5. AGENCY BRIEF AND ASSIGNMENT.** It is essential to develop a comprehensive finalist agency briefing that articulates a "real world assignment" representing key challenge(s) for the marketer's communications needs. Ample time should be allotted for agency development. See our next point!

## THE NEXT 5 "MUSTS"

6. **YES, YOU CAN GET REAL WORK FROM AN AGENCY SEARCH!** Allow time in your process to conduct both strategic and creative work sessions with the core client and finalist agency teams. These are not presentations but actual work sessions enabling the client to observe how well an agency takes direction and for the agency to observe how well the client provides direction ... as well as constructive feedback to help make the work better.
7. **MAINTAIN A LEVEL PLAYING FIELD.** An agency review process that includes an ethical and experienced consultant's participation at each stage and milestone will help to ensure a consistent, level playing field among the agency candidates. A good consultant will ensure that each agency receives the same information, at the same time, in the same way. No exceptions.
8. **COMPENSATION "DIALOGUES".** Have them. Dialogue, interact ... early in the process. This is where a precisely written SOW will prove its worth. It is a tool that both marketer and agency can work with and negotiate. Understand the "value" differences between agencies and their staffing models, allocation of overhead, profit requests.
9. **DEBRIEFING AGENCIES.** Provide a thorough, constructive debrief of all losing agencies. Include your consultant in the process if you have retained one. Be candid. Be helpful. This helps everyone involved do better the next time.
10. **ENGAGEMENT START-UP.** We advise all of our clients to conduct an Engagement Start-Up program that begins within a day or two of the new agency's selection. Its goal is to jump-start the client-agency working partnership and to delineate all the activity, roles, responsibilities for the First 100 Days ... or in one case, the First 7 Days ... the track was that fast.

If you would like for us to elaborate further or answer any questions, we will be pleased to do so. Lee Anne can be reached at [leeanne@leeannemorganpartners.com](mailto:leeanne@leeannemorganpartners.com) and Alan at [alan@akrinsky.com](mailto:alan@akrinsky.com).

We love what we do and we do it really well. So, we are always happy to tell you about our work and to discuss, in confidence, your issues and needs.



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