

## HELPFUL HINTS

# TIPS FOR PICKING THE RIGHT MARKETING AGENCY

How to find, vet and select an agency to help with your next campaign or special project while getting the relationship off on the right foot.

**Choosing an agency partner is often more about fit than financials.**

### DO YOUR HOMEWORK

Look for marketing/communications/branding/fundraising campaigns or projects you admire. They do not have to be from your industry, but you should avoid work from a possible direct competitor. Reach out to the organizations who produced the campaign/project and ask them who the outside agency was.

*Ask them a few general questions about the firm they worked such as:*

- How did you choose the agency?
- Did you enjoy working with them?
- What are their strengths and weaknesses?
- What did they do particularly well?
- Were they on time/budget?
- Would you work with them again?
- Who was your main point of contact?

### DEVELOP AN AGENCY SHORTLIST

It would be best if you aimed to have a list of at least three and no more than five agencies that you think might match your requirements. Then check out the firms and their people online, including their websites and social media.

Reach out to the agency via email/phone, tell them about your campaign/project and request a short, informal meeting (in-person/video). You might want to prepare a one-page overview of the project/campaign.

This first contact is excellent for judging personality and cultural compatibility.

*Have some questions ready such as*

- Does your firm have experience working for relevant clients?
- Does your firm have experience (insert your requirements for strategy, writing, design, digital marketing, etc.)?
- Does your firm provide ongoing support/counsel?
- Will we retain ownership of the work produced?
- If we worked together, who would be our main point of contact?
- Do our organization and our project interest you? Why?
- Would you be interested in responding to an invitation-only Request for a Proposal?

## PREPARING YOUR RFP

Unless your project is of significant scope and budget (\$250K+), aim to develop a concise RFP that is no more than 4 pages.

*Include at least the following in your RFP.*

- **Purpose** – The "what and why." Don't just state what you want the agency to do; also, say why. Articulate the problem that is motivating the project as best you can. Stay high-level.
- **Primary Contacts** – Include this upfront. It helps if you listed the full name, job title, preferred contact method and role in the project (main point of contact, final decision maker, etc.
- **Timeframe** – Consider whether your allotted project timeframe is realistic given your project needs and available resources. While you can set dates for your timeframe, agencies will feel more comfortable if you say that you're also open to their timeframe suggestions. You may even get feedback that they are not interested in submitting a proposal based on your proposed timeframe.
- **Anticipated deliverables** – If you know what deliverables you need, include them here, but be open to other suggestions.
- **Available resources** – Let the firms know what background information and materials will be available, such as research, plans, image libraries, brand manuals, etc.
- **Budget** – No one likes to talk about money. But that doesn't mean you should avoid mentioning your desired budget range. Some agencies (like ours) will often decline to respond to RFPs that do not include budget information. Not sure how much a project costs these days? You might benefit from some initial research - talk to a few trusted colleagues in your industry.

Once you have sent out the RFP, invite the firms to ask any questions they may have via email or in a meeting. Make sure to give them sufficient time to submit a proposal for smaller projects, at least 2-3 weeks. Refrain from asking for unpaid work for strategy, design, etc., because some agencies (us, again) will decline any RFP that asks for unpaid work.

## MAKING YOUR DECISION

Once you've decided, please get back to all the firms who submitted and let them know why you chose to go with another firm. Offering up constructive criticism may help reduce the sting of not being selected.

Firms can put a lot of time and effort into proposal submissions, and leaving them hanging can burn a bridge you may need to cross if things don't work out with the firm you selected.