



# Working with agencies

## How to be a smart client



You need to be a smart client if you're going to get great work from agencies. So put the work in: write great briefs, make time for inductions and engagement, treat your agency as a partner and don't expect them to solve internal problems for you.

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Ali Sanders, head of brand, Macmillan Cancer Support

# Welcome

Successful partnerships between charities and agencies can build transformative communications strategies, stunning ad campaigns and powerful brand identities. At the other end of the scale, they might keep newsletters ticking over, leaflets going out and websites up to date.

When collaboration works, charities get cost-effective solutions and agencies get fair reward for their contribution to the cause; but of course, that's not the whole story. Client/agency contracts sometimes fail – and when that happens, funds are wasted, targets are missed and staff on both sides of the desk wind up feeling they've been exploited.

A great deal rides on these relationships, which often bring critical challenges and large sums of money into play. Financial pressures only serve to heighten the inevitable tensions. Charities are having to scrutinize their budgets ever more closely and demonstrate returns on every pound of investment; agencies are finding their margins squeezed as clients guard their purse strings.

Client demands can be seen as unreasonable, while agencies are sometimes accused of over-charging and under-performing. Yet when the two parties are asked what should be done to address these difficulties, it becomes clear a) that they agree on a number of key principles: clear goals, regular communication, respectful behaviour and so on; and b) that each side would benefit from understanding more about how the other operates.

This guide explores how charity clients can improve their agency relationships by putting sensible principles into practice – and by understanding better not only what encourages agencies to give their best, but also what drives them to despair. Common issues arise for marcomms/digital agencies and their clients in all sectors, but the charity context appears to deliver its own set of challenges; our aim is to help ensure charity clients are some of the smartest clients around.

**Vicky Browning, director, CharityComms  
and Kay Parris, author**

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# The top 20 habits of smart clients

There are lots of elements to working well with an agency, but here's a digested read of our full guide. The tips-in-brief offered below roughly follow the

chronology of the guide (and the [contents page](#)), so if you want more details and case studies on specific aspects, they shouldn't be difficult to find.

**1.** Before approaching an agency, face up to and address or accommodate your charity's realities, tensions and structures. Agencies can't solve your organisational problems for you; but unacknowledged internal issues can scupper your agency dealings.

**2.** Be crystal clear about your core objectives, including what you need (and don't need) help with. Seek buy-in from your charity stakeholders prior to looking outside.

**3.** If you need help, could you get it from charity staff, or from volunteers or freelancers? Be sure that you actually need an agency before you go about hiring one.

**4.** Reflect on previous experiences. Ask yourself, what kind of a client have you been? And what kind of a client do you want to be this time around? If you got burned in a previous agency relationship, what could you learn from it?

**5.** Write a great brief: focus on your core objectives and success criteria – generally don't try to answer all your own detailed questions; that may be the agency's job.

**6.** Spend some time on desk research, to discover which agencies are offering, and excelling in, the services you require.

**7.** Consider with caution any opportunities to commission pro bono (ie unpaid) work from an agency. Ensure any agencies offering pro bono work are fully in sympathy with the aims of your charity and your project; and treat them as professionally as you would a paying supplier.

**8.** Compile a longlist of promising agencies you have identified from your research and send out requests for more information.

**9.** Analyse the replies you get, arrange any meetings or conversations with interesting candidates, and then draw up a shortlist.

**10.** Brief shortlisted candidates clearly and fairly; have face-to-face meetings if you can; reveal roughly what budget is available; get all parties to sign a non-disclosure agreement before sensitive information is shared.

**11.** Consider very carefully what kind of system to use for final selection. An elaborate and costly (to both sides) pitch may not be necessary. You could ask for concepts, strategic ideas, a workshop, or a brainstorm.

**12.** If you are going for the full pitch, be reasonable about what you ask candidate agencies to do, and clear about how you will judge them.

**13.** Get your key charity decision-makers to attend the pitch or engage as much as they need to in the process.

**14.** Check whether the people pitching will be the people carrying out the contract if successful.

**15.** Ensure you get a proper contract signed, making clear what your success criteria and payment terms will be.

**16.** Plan for induction – depending on the scale of the project, opportunities for getting to know one another better could range from emailed information, weekly calls or bi-monthly meetings to office-working swaps or a programme of induction and refreshment events.

**17.** Obey reasonable relationship rules, like: communicate regularly; make dates to meet and see how things are going; take conscious steps to keep the spark going; listen to and respect one another.

**18.** Evaluate progress on your project, and the final project outcome; operate clear sign-off systems involving as few key people as possible.

**19.** If things start to go wrong, take steps early on to offer or listen to constructive feedback and agree changes of approach.

**20.** Be calm, well-organised, fair and practical about bringing contracts to an end and transferring to new agencies.

# Part one

## Get your house in order



### 1. Organisational realities

Shedloads of ingenuity, money, collaboration and time were wasted – and many tears spent – on a national ad campaign that a charity I once worked for commissioned and then had to abandon. It was rejected, just weeks before launch

date, by a meeting of the organisation's executive body.

This was a campaign devised by a brilliant agency and supported by key senior managers. It would have generated



The problem inside the organisation is often lots of conflicting views and decision-makers who are not equipped to judge between them.

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Chris Rose, consultant, [campaignstrategy.org](http://campaignstrategy.org)

national news, put a rocket under the organisation's public profile and attracted potentially thousands of new sympathisers. However, its bold message also risked repelling some existing supporters.

While the campaign's proponents tried to mitigate the risk, essentially they believed it was time to take their chances. Others saw things differently.

The agency had done everything right: understood the client's vision and goals, communicated well, been creative, brave, radical, committed and accommodating. Yet thousands of pounds and months of potentially award-winning work fell to a lack of buy-in from the wider organisation.

Many comms people work in charities where this kind of thing can happen. Blurred lines of accountability allow unpredictable interventions; fundraising and comms sometimes have different agendas; factions among membership committees and executive boards can decide to flex their muscles.

Whether it's a media campaign, brand review or digital overhaul you're planning – and with or without the help of an

agency – most teams need broad, high-level backing to make it happen. It's not just a case of getting the go-ahead. It's about who is going to have a say, what kind of a say and when.

So, preferably before momentum has even begun towards developing your campaign, and certainly before you contemplate hiring an agency, you need to factor in your organisational culture.

### Reality check

Any of the following factors could affect the way your organisation responds to a major comms or marketing campaign proposal:

**Autonomy:** How autonomous are your project leaders within the organisation, not only in relation to the CEO, but also in relation to trustees, other departments, members or supporters?

**Structure:** Many large charities have complex structures, involving networks of accountability spread around multiple offices. Though some key functions (almost always including comms) are centralised, systems may be in place to ensure wider consultation as appropriate.

**Membership and democracy:** Some membership-based movements, such as trade union or church organisations, revolve around democratic structures.

**Mission and purpose:** Is a recognised, organisation-wide strategy in place

and are different teams aware of their roles and responsibilities in achieving organisational goals? If so, will your proposed campaign help further those goals?

*See page 58 for more on signing off.*

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## Stakeholder consciousness

*'Ensure you have a clear understanding of who your key stakeholders are, and consider how you will involve them, when, and for what purpose. Getting feedback and involving teams, or representatives, doesn't mean they have to "sign off". The fewer people who have ultimate approval, the better. But this will only work if all the right people are engaged and/or involved at the right time, in the right way. Be crystal clear about involvement and levels of responsibility right from the start.'*

**Carly Wilson, head of brand advertising and integration, Macmillan Cancer Support**

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## First win buy-in

*'One thing that really helps smooth the path of a project before you get to sign-off is if the client works hard to win buy-in for the work's objectives at the outset from all the key internal influencers.'*

**Ian Fannon, head of communications, MS Society**

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## 2. Understand your project

“ Having an objective, and the right kind of objective, is key to keeping things as simple as possible.<sup>1</sup>

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From *Communications strategy*: IPA, ISBA, MMA, PRCA

Perhaps you are considering hiring an agency long term, to help you develop a communications or marketing strategy. Or you might have a single major project in mind arising from wider strategic goals.

Either way, it's crucial to begin with clear, realistic objectives – without them you have little chance of winning wider organisational backing, or of inspiring any decent agency to pitch for a contract.

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### Clear goals

*Some examples:*

- *Increase membership*
  - *Launch into a new market area*
  - *Promote a product or service*
  - *Reposition your brand*
  - *Encourage internal team-building.*
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## Primary roles for communication

- **Raise awareness:** of a new product or service – or among a new audience for an existing product/service
  - **Activate:** translate awareness into action (eg visit website, sign up for membership)
  - **Reinforce:** unashamedly take steps to reinforce good perceptions. Think John Lewis Christmas
  - **Change perceptions:** as McDonalds did through its “100% British beef” message at a time when public perception was of poor quality imported beef
  - **Introduce:** a new aspect to an existing product or service – you like this product/service, now it offers more.
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It must be clear to you what the need is. However, this does not necessarily mean you should come up with detailed solutions yourself. As one senior agency manager told us: “One of the best requests I ever got was: ‘We want to increase our adult membership, but we’re not sure how.’ That’s using us to do what we do really well.” Depending on your in-house resources, the scope of your project and

the kind of agency relationship you are considering, your objective might be more or less specific and prescriptive. Or you might have a broad and simple goal, but one that comes with particular difficulties an agency needs to understand. The point is to be honest with yourself about what the objective boils down to; then ask yourself how much guidance you might need to address it.

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## Seek clarity

*'Charities should ask themselves: how much do they know about the project and expertise needed? What should they ask an agency? Is it a campaign needing data and do they understand it – will they need a direct marketing agency? Or is it more help with branding/PR they're after?'*

**John Townshend, creative partner, Now**

## Acknowledge tensions

*'Charity brands can be surprisingly complex, and there can be tensions between brand and fundraising objectives. Making sure your agencies understand those tensions is key to getting their help in reconciling them in the work they do for you.'*

**Ali Sanders, head of brand, Macmillan Cancer Support**

## Think strategically

*'Digital innovation is about taking structures and thinking from other sectors and applying them to your own. How would it change your business if you moved your volunteering online, or streamlined the way you communicate with your regional sites? That's the sort of thinking that changes the game, and I wish I saw more of it.'*

**Jonathan Simmons, board director, Public Zone**

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### **Money! (say it out loud)**

One essential step toward setting realistic objectives is to allocate a budget.<sup>2</sup> A ballpark figure will do fine – you probably don't know at this stage exactly which services are needed or how much they will cost. But you do need to know what is available for you to spend on your campaign and roughly what level of service you can expect for that amount of money.

Agencies sometimes complain that charities get coy when it comes to talking hard cash. Two reasons, they say, are:

- 1 Charities lack business sense; they dream up grand schemes they cannot afford, but prefer not to upset themselves by facing up to reality
- 2 Charities know how much money they can spend, but they don't want to tell – in case the agency would be prepared to do it for less.

Few charity professionals would consciously set out to waste their own time, or that of a prospective agency, by concocting a proposal that has no hope of seeing the light of day. But in the absence of proper planning and preparation, these things happen by default.

Though you may be disinclined to put all your cards on the table at this stage, it will be a waste of time for both sides if an agency prepares a pitch suitable for a large contract when only a small budget is available, or vice versa.

Do a bit of initial desk research to give you a few pointers as to what range of services you might be able to afford. On that basis, you lose nothing by indicating a maximum figure you are prepared to pay. It is then up to the agency to offer competitive estimates for work it proposes to do, in answer to your brief. *(See also page 21, Plan your brief)*

Both sides stand to gain if they can talk openly with one another, as early on as possible. But before you get too involved in conversations, you must decide one thing for certain: do you actually need an agency?



## 3. Do you need an agency?

Most charities find they need external support at some time or another, in the form of agencies, freelancers or volunteers, who liaise with their staff teams.

In-house staff may work closely with external providers on a regular or occasional basis. Relationships happen across a very wide spectrum, according to the size of the charity and the scale of work. You might have a long-term arrangement with a media agency, a freelance editor, or a press office volunteer. There could be one-off assignments, when a major rebranding task or digital overhaul is outsourced – or when a single

template for a newsletter or website is commissioned, to be managed in-house.

The decision to use outside help is taken after balancing the needs of the project against the resources available in-house and the opportunities presented by outsourcing some or part of the work. Whether using an agency, freelance or volunteer, it is important to ensure you involve any relevant staff members where appropriate. That way, resentments are avoided and resources are not wasted on duplication or bringing in unnecessary advice.

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### Listen to your staff!

*'When an organisation finally bites the bullet and starts to pay for help, it often turns out they had folks on the inside suggesting many of the same things that the consultant suggests. But those folks were ignored.'*

**Charles Lenchner, non-profit communications consultant**

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Using the help of volunteers can be a rewarding experience for charity and volunteer alike; the difficulty, for more specialist projects, is finding someone with suitable expertise. If you are lucky enough to have a star volunteer walk into your team – cherish them. *(Some of the issues that arise from using volunteers may be similar to those arising from pro bono arrangements with agencies: see page 31)*

### Agency or freelance?

If you are outsourcing your project for money, you need to decide whether you will be better off with an agency or a freelance.

Do you already know a great supplier with the right expertise and pay rate? In that case, your decision may already be made. Otherwise, there are pros and cons of each option to be weighed up – the caveat being of course that every freelance and agency is different; each must be judged on their own merits.

### Agency option

- For larger projects, it will be much easier to find an agency that can match the range of expertise, technical and production resources you require. Indeed many projects will simply be too large in scale for a freelance to manage

- You will reap the benefits of collaboration and consultation among a group of specialists with broad skill sets
- Agencies are more likely to be well-versed in dealing with large accounts and may have a larger, more diverse portfolio
- When you are working with an agency, you are not reliant on one relationship – so the project is less vulnerable to unforeseeable events such as the creative becoming ill, letting you down or going bankrupt.

### Freelance option

- Generally, freelancers are cheaper than agencies – they tend to work from home, with much lower overheads
- Having a relationship with just one professional means you are always speaking direct to the account manager, meaning messages don't get delayed or lost in translation
- Many freelancers use networks that allow them to collaborate on ideas if needed (though be clear about any confidentiality implications)
- Freelancers sometimes use their networks to source professionals with additional skills and areas of expertise needed for your project. In this instance, you may want to think about their remit over selection and additional contracts/subcontracts.



## 4. What kind of a client are you?

“ Some agencies will say:  
charity people are weirdos,  
don't touch.

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Agency account director

A lot of agencies love to work with charities, getting creatively involved in great causes and teaming up with passionate, committed people.

However, many agencies report that they come up against unclear, unreasonable

pitch processes, budget cageyness, lack of authority, confused objectives, internal tensions and more.

What follows is three sets of agency/consultant perspectives – and suggestions. Brace yourself!

## Be honest with yourself

Dan Dufour, head of brand and engagement at The Good Agency, explains how it took moving from client to agency side for him to realise charities are sometimes less than scrupulous in their dealings

My opinion on working with agencies, as you would expect, has changed since I moved from brand manager posts at NSPCC and Shelter to my current role.

My focus client side was on sourcing great creative ideas and often – occasionally regardless of whether we had paid for them or not. I now better appreciate the resource and energy that goes into generating great creative ideas.

At The Good Agency we strive to work collaboratively with our clients. Singing proudly from the “one team, one dream” hymn sheet, we believe we’re united with our clients, working toward the shared goal of making something good happen together. We pour blood sweat and tears into developing ideas, strategies and creative concepts – so it’s frustrating and disappointing when they’re pilfered. We can’t revel in the collective celebration when they perform well, we can’t

troubleshoot when things go wrong and we certainly don’t receive the appropriate remuneration.

I believe finding the right agency is like dating. Be honest from the outset what sort of relationship you want with your agency partner. Are you seeking a quick fling? Something casual? Or a committed long-term relationship? Whatever it is you’re looking for, however emotionally involved or quick and dirty your needs, there will be an agency ready and waiting to satisfy them.

It sounds obvious but having a clear pitch process in place eliminates the chance of any confusion and the inevitable disillusion.

For example, we have had our pitch creative – which served to demonstrate the breadth of our creative ability rather than our final recommended solution – sent straight into consumer

research unbeknown to us and much to our dismay. We have held as many as 10 meetings with a potential client and still never received the brief that is definitely, certainly, yes of course, absolutely on its way. And we’ve seen our own concepts that have been politely declined at pitch-stage reincarnated by in-house creative teams.

My single piece of advice is simply to be honest from the beginning. Don’t underestimate the enthusiasm, energy, money and gusto with which agencies will throw themselves into your pitch briefs; establish clear aims, objectives, timings and deliverables.

Being clear about what you want is the best and only way to manage the expectations of your agency; it’s how to make sure you get the very best from them and the greatest possible bang for your buck.

## Pin down your problem

Katie Abbotts, an independent PR consultant who helps match charities with PR agencies, considers challenges for the agency-charity relationship

Budget is the obvious challenge. Charities will not have the budgets of commercial companies. The effect of this is that charities can't afford to pay the going rate – most of the time. This is not always a negative; many agencies find a charity client to be refreshing and motivating for staff and good for their own PR.

Often charities overload the brief – be careful and be clear. If you want help bringing money in, say so; if you need to launch a product, that's fine; if you want to rebrand, or need to raise your profile, explain why. But whatever you do, don't say

you'd like all these things. You will be disappointed!

Many agencies I've worked with are delighted to have a charity client; they find it motivating, intellectually stimulating and they enjoy the feel-good factor. But it does get challenging when agencies discover that getting a share of the charity PR pie is as hard as getting cut through for a confectionary client. It takes the same amount of strategic insight, creativity and hard work.

Agencies may find they have a charity client who hasn't worked with an agency before and doesn't understand what

they need, or how they work to get things done. In this case, it will be critical to have a frank conversation at the outset to agree a partnership approach.

Finding an agency and assessing its suitability is key upfront. Not all PR agencies are the same. Exercising rigour in selecting the right agency partner will pay off in the long run. You might choose one because of their contacts, or because they did an excellent piece of work, which resonates with your needs. If you are spending over £10,000 it might be worth running a competitive pitch – as you would a recruitment for a new hire.

## Relationships need to be built on trust

Jonathan Simmons, board director at digital agency Public Zone, urges charity clients to be more open and confident in their dealings with suppliers

We've been involved with the charity sector for a long time, and we've worked hard to develop our reputation. We get a lot of unsolicited approaches from potential clients, and I like to think that we can tell, pretty quickly, if we're going to be right for a client and they're going to be right for us.

To give you an example: there's the meeting before the pitch. If you want us to do a pitch to a roomful of people we've never met, well, we're going to have concerns about that. However good a brief is, it's no substitute for conversation, for meeting the people you're going to be working with. Charities need help, that's why they come to us in the first place. So if you've decided to hire someone, be confident in the process. Meet them. Get to know them. Explain what the issues are. Charities can underestimate the value of getting an objective view. It may well be that an agency can put a completely different complexion on the business problem you're trying to solve.

I've had prospective clients who have told me that the reason they've come to us is because

they want someone they can trust. They know our reputation in the sector, they know the work we've delivered for others. But then they don't want to meet prior to the pitch itself. I find that amazing. Can you genuinely trust people that you haven't met? I can't think of a single instance where a commercial client has done that. We're immensely proud of our culture, of the people we have working here. So come and see us – we think it's the single best way to get a flavour of whether you'd want to spend that money, start that relationship.

The pitch process itself can be needlessly secretive. It's so rare that I'm told what a charity client's budget is in the lead-up to the pitch, or who we're pitching against. And there's some irony in that: most of the time, we'll know who else is pitching – it's a pretty small world. It can be really helpful to know. Another agency may be better suited – for example, in terms of size – to give the client what they want.

Budgets can be the most challenging part of the exercise, though. Charity clients may say,

"I can't tell you what the budget is: you'll just come in exactly on that figure". For me, that's not an honest conversation.

In my experience, a commercial client will be willing to talk about budget because they understand that we're able to serve their business more effectively with that knowledge: we can plan resource, we can deliver far more accurate strategic thinking and we can immediately discount some approaches or start investigating others. At Public Zone we won't accept an invitation to pitch unless it comes with a clear indication of budget.

And here's the thing: once the contract is signed and the process can begin in earnest, the charity clients are the people I most enjoy working with. I've been incredibly lucky to work with open-minded, receptive, smart and challenging charity clients... they've pushed us to do some of our best work, and done it in a collaborative and friendly way.



## 5. Reflect on bad experiences

“ If what is being paid does not match what is being delivered, something is going to break sooner or later.<sup>3</sup>

IPA, *Marketing magazine*

While charities do well to consider how they come across as clients, it's important to be clear about the behaviour you expect from your agency – and what you will find unacceptable. A bad agency experience can leave charity clients feeling exploited and anxious about failed targets and wasted funds.

Why do agency disasters happen?

Because there are:

- a Bad agencies
- b Good agencies who sometimes fail to treat clients well
- c Good agencies who charities sometimes fail to select, brief or manage properly.

When charity clients get their recruitment and management approaches right, they are less likely to run into difficulties – but problems do crop up.

### Cautionary tales

Clients often complain when agencies:

- 1 Over-promise and under-deliver
- 2 Throw data, jargon and pie charts at you, to show what a great job they are doing
- 3 Don't challenge you enough; or do it too much
- 4 Present unexpectedly large invoices due to unforeseen expenses
- 5 Show a diminishing inclination to come up with new initiatives or attend/ arrange meetings
- 6 Want to be spoon fed then left alone (no revisions!)
- 7 Rest on their laurels, more interested in previous star clients than you
- 8 Send the chief executive to attend the pitch; but he/she is never seen or heard from again
- 9 Allocate their impressive pitch people to other projects once the contract is won
- 10 Present you with an "account manager" who turns out to be the office junior.

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## Disappearing trick

*'One problem I've experienced is when you appoint an agency based on the people you see at the pitch, and then they disappear, leaving you with inexperienced juniors.*

*I worked with one agency who, in the space of a six-month brief, changed the team several times, meaning we kept having to explain to new people what we wanted – and any continuity was lost. The account director who had sold us their ideas failed to intervene and was extremely defensive when I raised concerns. Now I always ask the senior lead at any pitch – will you personally be working on this account?'*

**Ian Fannon, head of communications, MS Society**

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## Strung along

*'My worst agency experience happened when I worked for a small charity and we hired a direct marketing agency for the first time.*

*They had an impressive client list, took time discussing our brief and convinced us they could substantially increase our membership. Looking back on it, I realise they should have asked us more questions; they seemed very knowledgeable, but they should have tried harder to get to know us.*

*The first few mailings got a weak response but the agency reassured us that brand awareness was being built – then they lost interest. The account director passed our account on to a production "associate" of his, who was sometimes uncontactable for weeks at a time.*

*With their experience, they must have realised much earlier than we did that the approach wasn't working, but no new ideas were forthcoming; they were just happy to keep sending out mailings and invoices.'*

**Charity client**

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However, there are two sides to every story. And there is one big first step a charity can take to increase the odds of a successful agency relationship: come up with a proper project brief.



## 6. Plan your brief

“ Remember, a brief is a cheque that will be cashed...<sup>5</sup>

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Martin Bostock, Nelson Bostock Group

Why bother with a brief? Lots of charities don't. And the same is true of commercial organisations. Joint industry research released in 2011 suggested as few as 50 per cent of client companies put in writing what they want from their proposed project and agency – and “writing” includes brief texts and emails.

Writing a brief can look like a scary, time-consuming prospect. Ringing up a few candidate agencies, explaining the kind of thing you have in mind and letting them ask a few questions is easy. And of course there are relationships in which the agency

already knows your organisation intimately and is better at understanding what you want than you are. Perhaps they have already produced brilliant campaigns for you on the basis of a verbal briefing.

It's not that it can't happen. But without a written briefing, there is no level playing field for agencies competing to win your contract; there is no record of what is required or of how success will be measured. Best practice is to produce a written brief and then follow up verbally, preferably with a meeting.

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## Content

Your brief will be used for two basic purposes:

- To give the agency an understanding of the nature of your business, its style, its markets and why you need the agency's services
- To provide a basis for an appropriate response at final presentation of the selection process.

From **How to Brief an Agency, AAR<sup>6</sup>**

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The information you include must be clear, concise and, as the name suggests, brief. Include critical information about your task and your charity – its values and priorities, and where it needs to go. If background or supporting material is considered necessary, include it in the form of appendices or attachments, not as part of the core brief itself.

Despite the formal nature of much of the document, don't forget to be inspiring. Agencies say that where they see the creativity and passion of client staff reflected in a brief, they get excited and motivated to give their best.

### Approaching the brief

Make sure you can answer these strategic questions:

- 1 Where are we now?
- 2 Where do we want to be?
- 3 What are we doing to get there?
- 4 Who do we need to talk to? (In other words, who is our target audience?)
- 5 How will we know when we have arrived?

The following is given as a suggested approach, to be used or adapted according to the context of your charity:

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# Briefing format

## 1 Background

### **Project background:**

- Explain the charity – its history, size, markets, structures and problems – and why the task is important
- What problem are you looking to solve, or what opportunity do you wish to exploit?

How do you see the role of the agency? (If applicable, mention which other agencies are working on this brief and their roles)

- What will success look like?

**Marketing objectives:** More detailed business case for the activity

**Brand:** Insights about the charity's brand identity, vision, status, values and personality

**Previous learning:** A chance to highlight, briefly, any lessons learned from previous campaigns

## 2 Core brief/needs

**Key objectives:** See page 9 and 10 for examples

**Mandatories:** The absolute priorities that must be addressed. And also: what you do NOT want the agency to do

**Target audience:** Define your audiences – whether consumers, existing supporters, particular communities, internal audiences, funders, opinion formers etc

**Key message/proposition:** Often phrased as “the one thing we want to say”

OR

**Strategic benefit:** Could include emotional and functional benefits. NB: One view is that the role of the communications brief is to be clear about what the benefit is, and leave it up to the agency to think through how to best express that as a compelling proposition; it depends on each organisation/agency relationship

**Consumer takeaway:** What will consumers think or do as a result of this project?

... continued overleaf

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**Briefing format** continued

**3 Implementation and process**

**Timings/key dates:** May include project timelines as well as timing for response

**Budget:** Even if you do not have a defined budget, give a ball-park figure, eg not less than X but no more than Y

**Evaluation/success criteria:** Define what these will be

**Sign-off:** Who will be involved in the sign-off at various stages, from the concept, through to the final work?

**Approvals:** Signatures of both those issuing/approving the brief and the agency.

Adapted from **Briefing an Agency: A best practice guide to briefing communications agencies**<sup>7</sup>

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## Handling a digital brief

### Tell us your vision

Your project has a goal. Tell us what that is and why you want to achieve it. What does success look like to you? You needn't suggest how it is going to be achieved – we will work to define that as part of the project.

### Talk to prospective agencies

The most successful projects are a result of collaboration: use your expertise and the agency's specialisms. Start this conversation at the proposal-writing stage by giving each candidate agency an hour of your time. As well as giving the agency a better grounding in the project – meaning you get a proposal that better understands your requirements – it gives you a flavour of what they're like to work with in a way that a presentation simply can't.

### Be open with budget

Your budget is essential to getting a proposal that meets your needs. It shows the scale of response needed. A £50,000 project is very different to a £500,000 one. (See also page 9, *Understand your project*).

### Think about your readiness to engage with the project

Include any core requirements and tasks your team has to complete. It helps the agency understand your needs. You could tell us, for example, about:

- Your provision for creating content
- Your internal sign-off process
- Key dates that may impact the project
- Systems our project needs to integrate with.

**Gavin Mallory, head of production, Cogapp**

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### Follow-up

Arranging a follow-up meeting after the agency has studied the brief will allow them to ask questions and gain a deeper understanding of the task at hand. The discussion may also result in reappraisal

and revision on the part of the client. A meeting will give both parties a first indication of whether they like one another and whether the chemistry between them could work.

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## Brand brief: clarifying terms

*Brand is one of those terms that is much misunderstood and abused on both sides. It is crucially important from the outset to make sure both parties are talking about the same thing. Your brief should be as honest and straightforward as possible in describing what you are looking for and your organisation's understanding of what it means by brand and a brand review. Crucially this needs to include the non-negotiables and an understanding of the different audiences that need to be involved and engaged in the process.*

*To give an extreme example, one charity I worked with a few years ago commissioned me to run a brand review that consisted solely of me sitting down with the chief executive, listening to their thoughts on a new name and set of key messages and being invited to agree with them. I begged to differ and they swiftly terminated the relationship.*

*If you want to get value out of using an agency, give them access to all the decision makers within the organisation and don't be tempted to "manage" the interaction, as you'll stymie the chances of real insights coming out.*

*Be straightforward and open from the beginning and insist on the same from the agency. Never be afraid to ask them to explain any aspect of what they are doing, and if they cannot do so without resorting to pseudo science and gobbledegook then something's wrong.*

*Agencies themselves are likely to take one of two routes to the brand review:*

- *Take an intuitive judgement of what is right and wrong from the outset and then look for evidence through the process to support or challenge this view, or*
- *Take a methodical approach to the process and use the evidence and insights gleaned to develop their thinking and recommendations.*

*Both approaches are valid, but it's really useful for you to know which it is from the beginning, so don't be afraid to ask.*

**Peter Gilheany, director, Forster Communications**

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# Part two

# Choosing an agency



## 1. What kind of agency?

It is not always easy to categorise agencies. For example, a “digital agency” might specialise in digital business services, design, creative, advertising, social media – or all these fields. At the same time, a

traditional advertising or creative agency might have developed an exceptional reputation in the digital sphere. Nonetheless, here is a handy listing of the most common marketing agency types:



The key thing is clarity about what your organisation requires. Then based on that, you can select a type; or not: is there a friend down the street who can help you out? Not every job needs an agency pitch.

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Sid McGrath, owner, Karmarama

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## Types of marketing agency explained

*Most often an agency will specialise in one area only but some may combine services. Agencies also vary in size with some employing many specialists whilst others may operate as sole traders (consultants).*

### **Advertising**

*Advertising agencies create, develop and produce advertising campaigns across print (newspapers, magazines), outdoor (billboards, bus shelters etc), TV and radio. Some will also book advertising space as well (see [Media](#) below).*

### **Brand**

*Brand agencies focus on developing brand identities – the company, name, visual identity, positioning etc. They normally undertake market research to assist with the development of the brand. Brand agencies often incorporate design (see [Design](#) below) as the process of developing a brand requires the development of a visual identity (logo etc). A brand agency is most commonly used when a company is starting up or an existing business is rebranding.*

### **Design**

*Design agencies provide graphic design services – converting a brand / message into a visual form. They will generally cover anything from designing a logo to producing the artwork for stationery, advertising and packaging.*

... continued overleaf

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## **Types of marketing agency explained** continued

### **Digital/online marketing**

Digital or online marketing agencies are concerned with any marketing relating to the internet. They focus on maximising the number of visitors to a company's website and engaging potential customers when they are on the site. Some digital agencies also provide email marketing services.

### **Market research**

Market research agencies design, carry out and report on and / or analyse research on behalf of companies. The research may be qualitative (eg focus groups and in-depth research), quantitative (eg omnibus) and / or fieldwork (eg providing personnel for street questionnaires).

### **Media**

Media agencies specialise in planning and buying advertising space. This role is often also incorporated into an advertising agency.

### **Print**

Print agencies take on a company's print jobs and outsource them to a printer. The agency takes responsibility for ensuring that the job is delivered on time, to budget and meets the specification.

### **Public relations (PR)**

PR agencies are concerned with making sure that a company and its products / services are mentioned in the media (newspapers, magazines, TV and radio, digital) and other important outlets (eg tradeshow, conferences) for getting information about the company to potential customers. They focus on generating free editorial, not paid-for advertising.

### **Social media**

Social media agencies help businesses build and maintain a presence on social networking platforms such as Facebook, Twitter, LinkedIn, Google+ and YouTube.

### **Web design**

Web design agencies build, develop and host websites. Most web design agencies also provide digital / online and social media marketing services.

A **marketing consultant** is the umbrella over all these services. A marketing consultant will work with a company to develop a marketing strategy and will then bring in the appropriate agencies and specific skill sets to deliver the marketing strategy.

[straightmarketing.co.uk/2012/01/types-marketing-agency-explained/](http://straightmarketing.co.uk/2012/01/types-marketing-agency-explained/)

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There may be no good reason to assume your needs are best met by a large or small, generalist or single specialism agency; it really does depend on the individual agency concerned and how it relates to your charity. (*Multiple agencies may also be used, see page 50*)

So, rather than searching for agency “types”, it can make more sense to seek out providers of the services you require, based on your marketing or communications objectives, and take it from there.

### **Deciding on the service needed**

While the nature of the project is a key factor in your agency selection, so too are the skillsets and remits of your own staff, who will be involved to a greater or lesser extent in the development of the campaign. Depending on such factors, some charities will need to find an agency that can offer substantial strategic, planning or research input. Others will be more focused on the level of creative originality or technical expertise the agency can bring.

Most agencies with strategic expertise also produce campaigns and materials, but will be particularly effective when invited to come in at the strategic planning stage. Those agencies who see themselves more as creative production houses might prefer you to be prescriptive – so they can concentrate on delivering products tailored to your strategic requirements. Then again, many agencies will be open to any kind of approach, depending on the project, the client and the nature of the relationship.

### **Avoiding conflicts**

You could examine the client lists of prospective agencies, to check whether

they include clients with similar aims or supporter groups to your own. While charities hesitate to view one another as competitors, it may be unsettling for all parties to find that a single agency is handling similar campaigns from two related charities at the same time.

### **Charity experience**

Research by the Media Trust on the marketing and communications needs of charities<sup>8</sup> found that 68 per cent of organisations want external service providers to share their ethical viewpoints, while 59 per cent specifically demand charity sector experience. Clearly many charities do share certain values, priorities and constraints in common and it can be reassuring to work with an agency that has gained relevant insights and experience. (Agencies which can demonstrate their commitment to the charity sector are listed as corporate partners of CharityComms [charitycomms.org.uk/members](http://charitycomms.org.uk/members))

That said, many agencies serve both commercial and non-profit client organisations, and many more may be eager to add a charity client to their portfolio – either to enhance their corporate image or out of a real desire to support a worthwhile cause – so a good deal could be on the cards. Check the evidence of any successes an agency has secured with a similar campaign or with a similar kind of organisation.

Having investigated the risks and benefits of a given agency's experience, you might also need to factor in what kind of reassurances, if any, your board of directors will be expecting.



## 2. Going pro bono?

“ Pro bono can work as a one-off project, with the charity giving the brief to a set of agency interns for example. But it shouldn't be long term.

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Lindsay Gormley, director of marketing, Asthma UK

Many charities have little or no budget allocated to the kind of campaigns they might need to grow their profile or fundraising base. Some secure an arrangement whereby an agency agrees to work on a project for them “pro bono” (translated from the Latin as “for the good”) – in other words, for free.

Better-funded charities may also be interested in exploring pro bono schemes,

or they might find they are approached directly with an offer from a reputable agency. A natural reaction may be not to look a gift horse in the mouth. But be aware that an agency will have its own goals in offering pro bono services – an award, a bit of experience, a more ethical profile or whatever else – and its priorities may or may not work for you.

## Pro bono: Win win or no no?

John Coventry, UK communications director at change.org, shares a straw poll and a few tips on pro bono work

Here's a scenario you might recognise. A big flash creative agency offers to come up with ideas for you – completely free of charge – which they're sure will be a game changer for your fundraising or lobbying push. Let's face it, budgets are tight for us poor comms folk, often expected to deliver front-page-grabbing, social-media-dominating campaign creatives on a shoestring. The CEO has declared she wants something GOING VIRAL (grrrr). Big Agency's freebie is there, tempting you. What's not to love?

Well, according to the charity communications experts I spoke to, quite a lot. A quick poll of comms pros across the sector throws up varying views – and some horror stories, like this one from an anonymous comms pro:

"An ad agency did some pro bono work for me a while ago. They were a pretty big group and their work was amazing. Their motivation was that they spent a huge amount of time selling cars and shampoo, so it was nice for their staff to work on something 'more meaningful'.

"However, when I took the artwork to our chief exec, he thought we could treat them like a normal agency (ie asking them to work up some additional concepts, make massive changes etc). We couldn't. I tried to explain that we had to agree to let go of control in order to get the freebie, but he wasn't prepared to do that.

"In the end we had to pull out; the agency was very angry, and I was left with egg on my face."

This is a not uncommon story, which shows how important it is to make sure expectations are set out from the start.

It's not all bad news. Antonia Bance, head of campaigns at Shelter, says its regular pro bono agencies always deliver. Steve Tibbett, a campaign consultant who has worked with ActionAid among many others, believes a good result can be achieved so long as agencies and charities work through what they want from the pro bono relationship at the outset: "If the agency wants to win an award for the creative, for example, this needs to be outed from the off, so everyone's clear. It changes the game; the agency may want to push for something controversial or inappropriate for your organisation – although it may work the other way and get you really good creative."

There may also be a bit of a disparity between the experiences of bigger charity brands and smaller, lesser-known charities, which may be more vulnerable to getting dominated. One communicator backs up this theory: "As a small charity we only ever use pro bono creative/marketing support. It's been a mixed bag. Lots of good intentions and talented people with access to great resources... but all ultimately of limited use. 'Free' often means 'we want to

enter this into an award' rather than something that actually meets the charity's objectives."

Therein lies the key to making it work. Agencies' business models rely on selling time – if you're not paying for it then they need to make it pay further down the line; while agency staff may set out with the best intentions, there's a financial director somewhere who's far more interested in the balance sheet than delivering top creative work for nothing.

In my experience, the most common outcome from a pro bono project is that neither client nor agency is really happy. The economic relationship with your agency is the biggest driver, not only of quality but of client service too. Agencies want to deliver good quality work, but they also want to be paid – and the ability to pay is a powerful card in the client's hand.

I would never factor in pro bono support unless I was entirely convinced of the supplier's commitment. For one thing, what does commissioning communications on the cheap say about the perception of its value within your organisation? As communicators, part of our role is to make the case for great comms internally, so while we should always be looking for great value, that doesn't mean no cost – it means the best outcomes for your organisation, which means, in turn, putting appropriate investment into it.

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## Five tips for pro bono work:

- *Be very clear on expectations from the outset. What do both parties want? Does the agency have a specific reason for wanting to work with you?*
- *Try and secure some budget for the project and get the agency to match that with a pro bono contribution*
- *Remember that while creative time might be free, you will almost certainly have to find money for costs and expenses. Make sure you have budgeted for that*
- *Factor in time for amends and revisions on any work, and agree it at the outset*
- *Try and engage with the agency as though you have paid full fee – be firm (but friendly) on deadlines and quality of work.*

**John Coventry, UK communications director, [change.org](https://change.org)**

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## Learning from experience

*Many small charities would not be able to survive without pro bono support, but in my experience there can be negatives. The charity I worked at a few years ago undertook a large pro bono campaign, and while the coverage it generated was huge, there is much, with hindsight I would have done differently. Thinking about this, my top tips to any charity looking to enter into a pro bono relationship with an agency, most particularly from an awareness perspective, would be:*

- *Don't be afraid to ask for a contract saying what the agency will and won't do*
- *Be clear about what you want to get out of the partnership, and put this in writing*
- *Recognise that there will be something in it for the agency, but that can work to your advantage*
- *Don't just feel grateful – treat it as if you were paying for it*
- *Don't be afraid to question*
- *Get as much out of it as you can*
- *Enjoy it!*

**Emma Malcolm, director of fundraising and marketing, Dyslexia Action**

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## Pro bono: mixed blessings

Research by John Coventry, [change.org](https://change.org)

### It can work!

*Our current designer is creating a campaign for us on a pro bono basis – this does work for us, as they are the agency we currently use for other work, so they are happy to give something in return for all the other jobs we put their way. Also, they like having us on their roster as the majority of clients they have are corporate. From their perspective, their designers get a chance to do something different and interesting, from our perspective we have a close enough relationship with them not to feel bad if we want to make changes.*

**Shaharazad Abuel-Ealeh, communications co-ordinator, Global Campaign for Education**

### Pre-sales ruse

*Often pro bono work is in fact pre-sales – the expected outcome for the agency is that this will lead them to new, fully-priced work. Once, as the result of “six weeks of our great people doing pro bono”, one agency pitched me a terrible, terrible, half-baked idea about golf. Golf. They thought I'd commission them, with real money, to go and do it. They were hurt when I didn't: “But we did all this pro bono work!”*

*Pro bono consultants often don't feel obliged to fully understand third sector projects. They think their sector is complex, whereas charity work is a quick read that they can pick up in a weekend.*

**Charity client**

### Rather an intern?

*Sometimes a skilled intern or volunteer(s) with the right supervision can actually achieve better results than a pro bono creative or PR agency – especially if you have been assigned a junior team, which is often the case.*

**Charity client**

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## 3. The longlist and the shortlist

Charities take many different approaches to the challenge of finding an agency: a single phone call to a known or recommended supplier; a full tendering process containing several or many steps; requests for different kinds of meetings, presentations or pitches by the candidate agencies.

What follows are some common steps for those organisations wanting to choose from numerous candidate agencies and offering a fairly major contract. Leave out or add steps as suits your circumstances.

### **Start at your desk**

There is no point getting involved in a formal selection procedure until you have exhausted an initial whittling-down exercise from the comfort of your office chair.

Begin with recommendations and agencies you know about (having noticed their work, or worked successfully with them on other occasions). Look also for any suitable-sounding agencies you may have on file, who might have approached you for work or invited you to events; scour

trade directories, journals and websites, talk to colleagues and other charity contacts about agencies they have used, or perhaps employ the services of a selection agency (*see page 38*).

To ascertain more about an agency's reputation, check out client lists, portfolios, memberships of trade bodies, success stories and awards. As well as reading testimonials on the agency's website, it is a good idea to contact a few of the agency's current or recent past clients to see what they will say about them in private. You could also find out if any of them are CharityComms corporate partners – companies that embrace and support our vision of promoting effective and inspiring communications ([charitycomms.org.uk/suppliers](http://charitycomms.org.uk/suppliers)).

You already have your written brief – a summary of your objectives, goals and needs, indicating the scope of the work to be done and a ballpark budget figure. You can now match these agencies against your known requirements and resources. Discard any that don't match your criteria; keep hold of all those that do.

### Longlisting

You can now send out a request for information (RFI) to all the agencies on your list, which could comprise up to 10 or so names. There is no need at this

stage to disclose any information about your planned project.

Use a pro forma questionnaire like this one:

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## Request for information<sup>10</sup>

- 1 *Company location/s*
  - 2 *Key agency personnel, including mini CVs/biographies and contact details*
  - 3 *Client details, including top 10 clients, testimonials and named referees*
  - 4 *Finances – including latest annual report and accounts, forecasts or business plans where needed*
  - 5 *Remuneration – how are fees structured eg fees, royalties, payment by results. Include draft contract*
  - 6 *Strategic approach – illustrating processes and methods the agency uses and describing how it evaluates the effectiveness of its work*
  - 7 *Services – summarise the marketing and communications services provided, indicating particular strengths*
  - 8 *Relevant experience – including at least two case studies, and a statement explaining suitability to meet the client brief*
  - 9 *Awards*
  - 10 *Creative work – provide samples with rationales and evidence of effectiveness*
  - 11 *Are you a CharityComms corporate partner?*
-

Once you have collated and analysed the responses, you may find you are already down to just a few agencies. You should certainly be in a position to create a longlist of no more than six agencies you would like to meet in person.

### Shortlisting

Now is the time to arrange initial meetings, if possible, with your longlist candidate agencies. You still need not disclose anything more than the name of your charity and the people who will be in the meeting, which would normally be held at the agency's office. However you might want to take this opportunity to sketch out an overview of your key challenges so that the agency can draw on their most relevant work and get the right people in the room.

The agency will have a chance to make initial preparations based on what they can glean of your charity's values and current issues. The meeting will give you a chance to check out their credentials in person and get an initial sense of the chemistry between people in the room.

From here you might be in a position to invite a shortlist of (ideally) four candidates to pitch. If not, you have the option of first

choosing up to six agencies to give a more detailed 'pre-pitch' presentation or 'think piece' in response to a brief relating to an issue for your charity (not your core project brief).

Once you have a shortlist, present shortlisted candidates with your written brief. Ideally you should have met all shortlisted candidates at least once before asking them to pitch with any kind of presentation.

At an appropriate juncture, where you or the agency will be bringing more sensitive information, ideas or materials into play, you will need to seek and give assurances about confidentiality and copyright. The parties should enter into a Non Disclosure Agreement, under which both sides agree not to disclose to third parties any ideas, business, financial or other confidential information they discuss.<sup>11</sup>

It is important to remember that any agency that gets this far will be investing substantial time, effort and money into continuing their bid – you should not introduce extra steps into the selection process for the sake of it; only if there is serious need and each agency is still considered a serious contender.



## 4. Towards a decision

### Intermediaries

If your team is lacking in the experience, confidence or time required for searching out its own agency, and has funds available to buy in some help with the process, you might be better off finding a good selection agency to help you. Indeed, though a selection agency will cost you money, you should set any fees against the likely time costs entailed in conducting your own search and appointment process.

A suitable selection agency will have up-to-date, detailed information on the agencies operating in your sector and can help match your needs with agencies that have relevant expertise, a potentially-compatible culture and an appropriate charging structure (*see listing on page 64*).

*Also see page 64 for a listing of joint industry-approved selection agencies.*

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*'In our experience, we've found intermediaries invaluable in the agency selection/ultimate pitch process. This is primarily for the reason of genuine impartiality supported by a real effort to get under the skin of the agency and match them accordingly to the right sort of client.'*

**Neil Hughston, founding partner, Johnny Fearless**

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*'It's really helpful to use an intermediary ... It knows the industry well, gives great advice and manages the process for you.'*

**Carolan Davidge, director of communications, Cancer Research UK<sup>12</sup>**

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### Procurement colleagues

If you are not in the market for hiring the services of a selection agency or consultant to help your search, it could be that you look internally for a second opinion or for advice on certain aspects of your agency appointment.

Some charities have dedicated procurement or purchasing teams which deal with the buying in of services. In the case of those who don't, finance departments will often want or need to get involved in considering the

business aspects of a proposed deal. The dispassionate advice of teams which understand contractual complexities, good value and commercial terms could turn out to be invaluable.

It may be that your procurement, purchasing or finance colleagues negotiate directly with agency finance directors while you deal with the agency creative and account directors. Agency account directors also often deal direct with your procurement office.

### Culture and chemistry

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*'Clients tend to post-rationalise. If they like the team of people that they meet and they work for a large agency, they will see all the benefits of "big". Conversely, if they don't gel with the agency team they will only see the downside of "getting lost" in a large agency. It is a very human thing to do.'*

**Martin Jones, managing partner, AAR**

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Whatever the approach your charity takes to finding an agency – however many documents, meetings, presentations and other parties are involved – personnel on both sides will need to feel they could trust, respect and get along with one another.

Great significance is attached to the culture and values of the organisations concerned and many of the steps outlined here in preceding pages – from your initial search, to your questionnaire, briefings and meetings – are designed to ensure your

charity finds a good cultural match. But inevitably, much of your decision will come down to personal connections – what individual people say to one another, how they listen to, look at and relate to one another.

It's important to factor this reality into your selection approaches and to ensure that you and your decision-making colleagues listen to what your gut instincts are telling you about the agency people you meet.



## 5. The pitch process

If you want to be a smart client, it's very important to think carefully about how you are going to arrive at a final appointment. Don't invite anyone you are not very seriously considering – or who you like enormously, but their geographical location or client list poses a problem – to present a pitch.

And be aware that a classic pitch is not always necessary. Depending on the circumstances, another form of face-to-face assessment such as a workshop, trial project or less comprehensive presentation could end up being a much less costly investment for both sides.

### Workshop

A workshop typically involves a day or half-day in which the agency staff, who are bidding to work with your charity complete exercises and interact with key staff from the organisation who would be managing the project.

You need to write a considered brief for the workshop, ensuring you have devised exercises that will help you to assess the agency in terms of key qualities such as:

- Communication skills
- Strategic thinking
- Chemistry
- Creative, analytical and learning abilities
- Prioritisation and decision-making ability
- Understanding your brand and its market
- Ethics, values and attitudes.

Don't set excessively demanding assignments – they are unlikely to show you anything more useful than a lighter exercise would reveal, and they create unnecessary stress for candidate agencies. As the list above suggests, your assessment should centre on the way activities are approached more than on an agency's on-the-spot creative output in response to exercises in this artificial setting.

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## Agency viewpoint: Age UK workshop worked for us

*Age UK ran a very different type of search for its communications agency. The objective was to merge Age Concern and Help the Aged; the charity needed a partner who could not only demonstrate good strategy and creative thinking, but the ability to understand its changing organisation and the sensitivity to handle multiple stakeholders and strong opinions.*

*Rather than leave it to a traditional creative-shootout pitch, the team instead ran a workshop where they could genuinely experience how potential agencies think and work. With the exam question "What could Age UK stand for and how could we deliver it?", all agencies were given a half-day to take the clients on a journey of understanding.*

*At Karmarama we found this incredibly refreshing and useful. It allowed us to showcase some proprietary techniques, demonstrate how collaborative we are and, importantly, get a good understanding of the clients themselves and whether they would be a good match for us.*

*We covered a lot of ground on the day, got to meet the key decision-makers and made real inroads into understanding the complexity of their organisation. The clients seemed impressed with us and we were awarded the account and, interestingly, four years later, a great deal of the thinking developed on that day is still referred to today. So it really was a useful and rewarding approach.*

**Sid McGrath, owner, Karmarama**

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### **Trial project**

This assessment approach can be useful when there is one particular candidate agency you are considering, as it involves you in hiring an agency for a small (paid) piece of work. Perhaps they emerged as the front runner from the longlisting and shortlisting process as described above, or they are an agency you are impressed by and want to get to know better without going through a competitive tendering process. A trial project can also be helpful if you are already working with an agency

but would like to consider another agency at the same time without burning any bridges (in this circumstance, check whether your contract allows you to hire another agency simultaneously with the incumbent).

The assessment can consist of a genuine task that gives you a chance to experience working in-depth with a new agency, with a view to commissioning more if all goes well. But you can get the same assessment benefit from using the

agency for a piece of experimental work that may or may not ever see the light of day – or even setting an invented task.

### Presentation pitches

For agencies, a full presentation pitch is a very expensive business carrying relatively low odds – assuming there are three in a shortlist – of success. So you must be sure it is the appropriate choice for your selection process and something you will treat seriously and with respect to all parties.

The best venue for most kinds of pitches will be at the agency's offices, where agency staff are in their element and have access to any necessary technology or resources. More importantly, visiting an agency on its home turf allows clients a much greater insight into its culture than a presentation

alone can achieve. The reality for the charity sector is that clients are more likely to host pitches than travel to agency offices, because it is easier, and cheaper, to get a day of pitches into the diaries of all the relevant internal stakeholders, rather than attempting to send your directors off on trips to different venues over several days.

You should ensure the agency understands your expectations – by supplying a clear written brief. This should explain the criteria on which agencies will be judged and what duration of presentation you are expecting. It can be helpful to run through the brief with the agency in person, giving them the opportunity to ask questions. 'Tissue meetings' are another option at this stage ([see page 56](#)).

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## A level playing field

*'When Macmillan was tendering for a brand advertising agency, we issued a written brief and then arranged a face-to-face briefing session with the three pitching agencies. That meant they all heard the same things from us and had an equal opportunity to ask questions. It was a really good way of immersing them in our world. On smaller briefs, where we haven't taken that approach, we always make ourselves available to answer questions and share the answers in writing with all the pitching agencies – again to create a level playing field and allow them to do the best possible work.'*

**Ali Sanders, head of brand, Macmillan Cancer Support**

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Various levels of pitch can be requested: strategic proposals, some concepts or ideas (answering an already-agreed strategy) or a full creative presentation or detailed media/digital/direct marketing plan. In the commercial sector fees are often paid for a full pitch; charity clients tend not to pay fees, but when the contract involves a significant investment they may feel a pitch process is warranted – and agencies may be willing to pitch for free. Agencies are generally allowed up to six weeks to prepare the full creative pitch – giving them a chance to learn more about your market and its needs, generate ideas and produce concepts and materials. But unless you are planning on paying a substantial pitch fee, industry experts suggest you don't request this level of work lightly.

Clients should consider very seriously whether creative proposals or highly-detailed media plans are really going to be helpful in the decision-making process, given the tendency for highly subjective judgements, the enormous agency costs involved and the relatively low incidence of pitch work actually appearing in the marketplace.<sup>13</sup>

To ensure fairness, you should make clear the parameters of your expectations and resist the urge to be impressed by offerings you didn't ask for. If you have only asked for strategic ideas it will be unfair to select an agency on the basis that they also presented great artwork for a poster. NB If you would like intellectual property rights over any materials the agency produces for the pitch, you will have to pay for them.

## Judging the pitch

- 1 It may not be realistic to insist that all the decision-makers in your charity are present at each pitch, though this would be ideal. However you should ensure the key decision-makers are aware of the pitch process, happy with the brief given to the agencies pitching and clear about who has the authority to appoint. The selection panel should normally include your top level of management and any other key players who might have an influence on the project. Let the agency team know the job titles of the panel members. You could also request that personnel attending the pitch will be the personnel assigned to your account if successful.
- 2 Set up an objective system for assessing each presentation and provide each panel member with a marking sheet. The criteria could relate to:
  - agency performance: how the agency has answered the brief, how its recommendations fit with your business objectives, how well its timetable and budget estimate work for you etc
  - the team: whether you like them, feel they have a good rapport with one another etc
  - the profile of the agency's existing clients: whether they are of a similar calibre or culture to your own organisation.Ensure that you get together to discuss each presentation within two days before colleagues forget what they have seen and resume normal routines.

- 3 Make sure you have discussed thorny issues such as contracts, remuneration terms, management of the project and what would represent obstacles or conflicts for you – before a final decision is made.
- 4 Decide on a winning agency as soon as possible – preferably no more than one week after the last presentation has been given.
- 5 Ensure all competing agencies are informed of the outcome on the same day and be prepared to provide full feedback to unsuccessful candidates. This should be in the form of a face-to-face meeting if desired by the agency.
- 6 Ensure the losing agencies return any confidential material to you. Your charity should return to the agency any pitch materials they might have produced, unless you have purchased rights to these materials through a fee.

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## Pitch perfect?

*'The worst pitch I've ever witnessed involved the CEO of an agency pitching with three junior colleagues. She was an impressive individual who gave robust answers to the questions we asked, but we knew from experience that we were unlikely to see the CEO again after the pitch. We couldn't appoint the agency because we had no idea what skills and experience the rest of the team would bring to the project.'*

**Louise Fish, former director of comms, NHS Confederation<sup>14</sup>**

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# Part three

## Working together



### 1. Paper work

In the excitement and relief that may follow your agency appointment, you could easily put off a chore like getting the

contracts sorted and signed – but don't. Working together without a legitimate contract leaves both parties unprotected.

Your charity, or the agency, may have their own contract templates, or you can go online to download one. Adapt it to fit the commercial, remuneration and any other terms negotiated by your own team, your selection agency or your procurement team. One thing to consider at this early stage, for example, is who gets the copyright on any draft ideas or proposals from the agency that don't end up being implemented – if you want rights you might need to negotiate or pay extra for them.

The contract will either contain or refer to a service level agreement (SLA), which focuses on the services and performance indicators agreed to by both parties. If you have a long-term contract – say to be reviewed after two years, it can make

sense to keep the SLA separate, so that you can revise it during the contract period without having to review the whole contract.

You might need to revisit your non-disclosure agreement at this stage, ensuring it still meets your needs and that both parties have a copy.<sup>15</sup>

You can then refocus on your written brief, discussing it with your new partner agency and considering any final adjustments.

The Public Relations Consultants Association (PRCA) has produced a charter that clients and agencies can choose to sign up to at the start of the relationship: [prca.org.uk/assets/files/NBG\\_Martin\\_Charter\\_AW4.pdf](https://prca.org.uk/assets/files/NBG_Martin_Charter_AW4.pdf)



## 2. Induction and understanding

Now that you and your agency have found one another, you need to get to know each other a lot better. A good agency will insist upon it. A good client will too. If you can, spend time visiting your agency, learning how they work

and what they can do for you. And bring them into the heart of your organisation. Every insight they gain translates into a conceptual mistake that won't be made and a sharper focus on your brand and its needs.

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### A good investment

*'The induction for your agency is crucial. Time invested with them up front will result in better understanding, greater commitment to the cause and higher engagement – ultimately they'll be able to do a much better job. They need to feel like they are partners, not suppliers, and really get under the skin of your organisation. It's rare to hear agencies have been given too much information!*

*If this is a big project, encourage them to spend time working from within your office and meeting as many colleagues as possible – from the evangelists to the sceptics – to get a true sense of your organisational culture and the challenges you might face.'*

**Carly Wilson, head of brand advertising and integration and  
James Renwick, senior brand manager, Macmillan Cancer Support**

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## Launching your partnership: top tips for small charities

*Small charities working with a PR agency for the first time can sometimes find the experience challenging or even intimidating, particularly if they don't have specialist experience in communications.*

### **Team spirit**

*Firstly it's important to remember that an agency/client relationship should be a partnership. If you don't set out feeling that your agency is your partner then you're probably with the wrong one.*

### **Prepare – and talk!**

*Your first meetings with the agency are the most important. They will ask lots of questions, so come armed with as much information as possible about your charity, as well as what you want from the PR campaign. A written brief will be an invaluable resource.*

### **Just ask**

*Agencies are notorious for using “PR speak” so if you don't understand what they are saying you must say so. Equally if you don't know exactly what you want from your PR campaign don't be afraid to ask; the agency can help you map out a plan you are happy with.*

### **Time factors**

*The main challenge that agencies come up against is being brought in late, so please do involve them as early in the planning process as possible.*

*You will need to review and approve materials, and this process can be time-consuming – a major challenge for time-poor charities. My advice would be to set up a regular weekly call to discuss each element of the plan in detail. Prepare in advance of the call by running through the plan and timeline so that you can contribute where needed.*

### **You call the shots**

*And finally, remember that if you're paying for a service then you call the shots; listen to your agency's advice but at the end of the day any decisions are yours to make.*

**Tracey Carey, managing director, Brown Bear PR**

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Many charities operate rolling induction programmes for their own staff – not only because staff continually join and leave organisations, but also because organisational priorities and realities change, and staff get jaded over time. The same principles apply to agency staff; a long-term agency relationship will benefit enormously from regular exposure to senior management briefings and meetings, and to events and programme visits.

Besides, a new face on either side of the desk can destabilise things in the partnership – confidence comes from spending time together and knowing the other person is up to speed. With the right approach, you can ensure personnel changes present only temporary challenges rather than derailing the relationship in which you've invested so many resources.

## Long-term partnership: ongoing learning

Lindsay Gormley, former assistant director of marketing at Barnardo's, explains how a dynamic programme of induction and renewal ensures agency and staff engagement

At Barnardo's our relationship with our ad agency BBH has been going strong for 10 years, so it's important that both partners are able to evolve and grow to keep the relationship fresh.

We run quarterly horizon-scanning meetings with our CEO, marketing team and BBH's top management and account team. Our marketing director has regular one-to-ones with our agency planner to ensure top-level strategy is always feeding through. We have an induction programme, where new joiners

to the account go on service visits to meet the staff who deliver our work on the ground and the children and young people we help – this ensures they really get under the skin of our brand. And likewise new joiners to marketing have an induction at BBH, which includes the history of our advertising, the development of our strategy and an induction into the TV production process.

Each new brief includes case studies, stats, policy information and visual references, and the creative team all go out to spend

days in our services. We take part in BBH's annual customer satisfaction review programme and action plans are produced as a result.

At Barnardo's we review our agency requirements with every new business plan. On top of all of this we are lucky enough to have an agency that lives and breathes our brand – a team of cross-agency staff led by our head of TV recently climbed Kilimanjaro and raised £40k for Barnardo's.



## 3. Multiple agencies

Sometimes a charity has complex communications needs but finds that one single, integrated communications agency is able to offer the whole spectrum of skills required. In other circumstances, you might decide to use two or more agencies to handle different aspects of a campaign. Perhaps one agency has created a new digital strategy and package of services, another has delivered a digitally-integrated ad campaign and a third is focused on direct marketing.

A multiple agency arrangement calls for:

- a an overarching strategy to ensure each element fits into a cohesive whole, and
- b proper management.

All parties need clarity over where the different responsibilities lie and how the relationships will work. Some charities decide to take on the job of coordinator or ringmaster themselves; others will appoint one of the agencies as "lead agency" with authority to act and take decisions where necessary.

The lead agency's remit is up to you; it could stretch, for example, to taking charge of the whole project team and selecting sub-contracting agencies to fulfil various specialist roles. However, any decisions would of course be subject to the agreement of the client charity, and the charity must ensure effective, regular communication between itself and the lead agency.

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### Multiple agencies: keep talking

*'It's important to stay in touch frequently, and keep channels open and cordial. Have a good system to ensure agencies are informed of any and all changes to messages/identity. Facilitate ways to enable your agencies to feed back frankly on how they find working with you. Find centralised ways to monitor agencies – both account management and creative output. Make sure they see work being done by others. Be honest, keep talking.'*

**Barbara Cormie, creative manager, Macmillan Cancer Support**

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## Collaboration and partnership

*'When working with more than one agency on a project, it usually makes sense to encourage those agencies to talk to each other, to integrate activities and resolve problems. When I was agency side at Fishburn Hedges, I worked on numerous client accounts where we had to produce PR plans that would work alongside other marketing activities – and the result was always better when we worked with the other agencies before presenting to the client.'*

*As a client, you benefit from this kind of collaboration. At the MS Society, for example, we recently had one agency working on refreshing our brand guidelines at the same time as another was helping us redesign our membership magazine – so we encouraged them to keep each other informed as both projects progressed, which helped ensure the new magazine was in keeping with the refreshed brand.'*

**Ian Fannon, head of communications, MS Society**

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## 4. Maintaining the relationship



Managing an agency is a process. Your best press officer or graphic designer is unlikely to be a good agency hirer and manager (they are too busy being good at what they do), but your best manager of people will get the most out of an agency.

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Katie Abbotts, charity PR consultant

Once any last issues with the brief and strategy have been ironed out and initial inductions have happened, your agency can begin work on your project. It's important to maintain close and regular contact as the hard work gets underway. Never be afraid to ask questions, admit anything you don't understand, seek updates and give honest opinions about what you see.

But remain open to new ideas, keep listening and always ask yourself whether you are behaving in an encouraging and collaborative way.

### **Firm friends**

It's easy to see why client-agency relationships invite analogies with more intimate ones: chemistry brings you together, respect and trust seal the deal, then, once the honeymoon period is over, both sides have to try and keep things from going bitter or quiet.

So, the widely-agreed keys to a long and happy partnership with your agency won't be surprising. They include:

- 1 Clear, honest, supportive and regular communication

- 2 Things in common: keep taking an interest in one another, learning more about each other's industries – get your agency to attend your conferences and events
- 3 Offer excitement – a jointly-managed focus group or away day could be anything from an elaborate to a budget affair: the agency might even
- 4 Relationship and project reviews – revisiting the goals and results achieved so far. Ask the questions that must be asked: how is this going? What should we change?

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## My top 10 relationship tips

- 1 **Be clear and constructive.** Explain what you want to do and why, what you want to achieve and what success looks like. Make sure your feedback works hard for you by giving it at the right time and in the right way. Refer back to your objectives and give examples to explain what you mean
- 2 **Have empathy.** In my experience, agency teams really do want to deliver the best results for you; they work very hard and for long hours to do so. That presentation you are about to see may well have been produced at midnight and with pressure from other clients
- 3 **Build relationships.** Invest in getting to know your team and allow them to get to know you. It will make a difference!
- 4 **Be timely.** Ensure you meet your deadlines. That project plan your account manager is juggling depends on it
- 5 **Have trust.** We use agencies because they have specialist skills we may not have. Trust them and allow them to use these skills to the best of their abilities
- 6 **Be decisive.** Make up your mind and make decisions. Be clear on your chain of command or internal approval structure. Your agency can help you with this
- 7 **Work in partnership.** Your agency should be your support and ally, not your foe! Give them access to your strategy and keep them informed
- 8 **Be open.** Keep an open mind: the thing you think you want might not actually be what you need
- 9 **Say no.** If something is not right and is not going to work for you be very clear about saying no. Agencies can be persistent especially when the creative director has given them an idea to sell in that he is passionate about!
- 10 Always, always, **say thank you!**

**Lindsay Gormley, director of marketing, Asthma UK and former agency account manager**

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## A lasting bond

*'I have never had as good and effective a working relationship with an agency as the one I am pleased to enjoy with my current agency, Creatiscope. We first worked together when I was in a previous role and my organisation's supporter magazine needed a complete redesign.*

*I have found that maintaining a level of informality and flexibility in my relationship with the agency has worked really well – perhaps this is an advantage to working with smaller agencies? One of the key things has been to let the agency be the agency, not to micro-manage their design work – especially if they have been tasked with taking your work in a different direction. The biggest mistake I could have made in this circumstance would have been to withdraw their creative licence.*

*My approach is that I know best how to write about my organisation and its work and the design agency knows best how to maximise the impact of that writing visually. As a result – unless a design is actually misrepresenting the work, and once small tweaks have been made – the design stands.*

*Our respect for one another's skill sets and responsibilities means that we have avoided the frustrations that can occur. My working day is therefore less stressful than it would otherwise be and my organisation benefits from design work that really delivers against the objectives. I have recently changed jobs, and I am delighted that my current organisation, Toybox, is now working with Creatiscope on a large branding project. I am really excited about what this will mean for us.'*

**Fiona Furman, media manager, Toybox**

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## Respect and understanding

*'The most productive and beneficial relationships I have been in with charity clients are ones that are based on some fundamental principles, often shared at chemistry meeting stage, throughout the pitch and throughout/during the tenure of the relationship, namely:*

- *Honesty: the agency is valued for its opinion and is not fearful of putting it forward; this culture is nurtured across both organisations top down/bottom up*
- *Mutual respect: throughout both organisations*
- *Clear demarcation: clarity and direction on the respective roles of each organisation and the inherent team members*
- *Recognising creativity's role: many client organisations negate the power of creativity in this sector*
- *Understanding the challenge: all charities compete for a share of heart, time and of course wallet; they are all in competition in some way shape or form, possibly with the exception of those that purely want to raise awareness.'*

**Neil Hughston, founding partner, Johnny Fearless**

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## 5. Interim or “tissue” meetings

“ “ It’s cats and dogs.  
Clients are the cats,  
saying, “Impress me!”  
Agencies are the dogs:  
“Please love me!”

---

Martin Jones, managing partner, AAR

Depending on the nature of the project, you might agree to arrange interim meetings at which the agency presents partially worked-up concepts and you throw ideas around together. Some say the “tissue” meeting gets its name from the tears of creatives when their ideas are rejected. These meetings can be held at pitch stage (*see page 42*) as well as during an up-and-running account.

They may not be on the agenda if your charity has been intimately involved in every step of the creative process; but where an agency is off progressing the project and then reporting back at intervals, something like this might be arranged. Whether and how you do it depends on your working relationship with your agency: “Some clients say: I want to be led,” says Sid McGrath, owner of Karmarama. “Some say – I get involved, give me options.”

Bear in mind that creatives may not always be keen to unveil their half-developed ideas the moment you click your fingers. As John Townshend, creative partner at Now ad agency, puts it: “Sometimes we’ll say to ourselves, no! We like this – we won’t show it yet! You have to make the agency feel comfortable, respected first. Clients often underestimate how emotional creatives are.”

In theory, a tissue meeting is a safe space where ideas can be knocked about without judgement. The agency might offer up an approach it knows is not quite right, because it believes it is on to something; or it might present a range of concepts to test a client’s boundaries – some might seem barking mad, while others are conservative. However, the whole notion of tissue meetings has its fans and its detractors.

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## A tissue?

### For

- *It allows the client some clear creative input*
- *It's a great partnership-building opportunity*
- *During a pitch, it's a safe space in which the agency can put a toe in the water and see the kind of things you like and don't like, so the pitch is less of a stab in the dark*
- *During an ongoing account, it prevents the agency spending too much time developing ideas that are not going to work for you*
- *The agency gets a chance to warm you up to a creative direction they are taking, rather than risk shocking you with a great idea you haven't had a chance to get used to*
- *It decreases the likelihood of a "car crash" meeting further down the line. This is particularly important when trustees and other senior stakeholders are involved – a badly misjudged product will reflect as badly on you as it does for the agency.*

### Against

- *During project development, a scheduled tissue meeting creates artificial pressure on the agency to come up with multiple concepts, giving the client something to reject as well as something to like: a waste of time*
  - *During a pitch, a tissue can turn into an unproductive game about the risks and benefits for the agency of showing its big idea at a particular stage*
  - *Clients sometimes complain of agencies that go through the motions by:*
    - a) knocking up something the night before just so there is something to talk about*
    - b) not really listening to client input or*
    - c) using the tissue meeting to get the client to do all the work of developing a concept*
  - *Because of the effort that might be put into developing multiple concepts for the meeting, there is pressure on the client to "pick one" of the approaches – which might not be appropriate*
  - *Some great ideas could be rejected at the tissue meeting before there has been time to develop them into something that works*
  - *Sometimes at a tissue meeting, the agency ends up listening to the advice of one assertive client representative, whose views may not be representative of a wider client team.*
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## 6. Signing off the project

If you did your homework at the “getting your house in order” stage ([see page 6](#)), and have kept all agreed stakeholders in the loop as the project develops, the final hurdle should be a formality. Or at least, not a nightmare.

Try to get to a stage where only one or two managers are allowed final sign-off. There may be clear approval, a few

concerns or multiple requests for changes, but things should go well so long as:

- the right people are involved
- your channels of communication are clear
- there is only one main contact point for the agency
- everyone understands who has ultimate authority.

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### Whose word goes?

*‘Usually sign-off works best when the client has managed to put in place really clear levels of delegated authority, so that things don’t need to go past every Tom, Dick and Harry. One or two contacts at the client side should be trusted to sign work off (or if not, then at least the client does all the work to get sign off in-house and the agency retains a single point of contact). It can get messy if an agency needs to go to several people client side, because if different clients give conflicting views, the agency is sometimes left trying to work out who trumps who.’*

**Ian Fannon, head of communications, MS Society**

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## 7. Evaluation

If you have written a comprehensive brief, including clear criteria on what success looks like ([see page 24](#)), then the task of measuring and evaluating how goals are being met should be a straightforward one.

You will need to agree a framework for when evaluations take place.

They could be:

- Every month or at key stages during the life of the project

- Twice a year for long-term client-agency relationships or
- Whatever format works for you.

If you are paying your agency by results, agreeing an evaluation framework and ensuring that regular evaluations take place will be a critical part of the business relationship.

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### Assessment checklist

- **Be as even-handed as possible.** And ensure feedback is two way
- **Conduct them regularly.** Every 12 months is not enough if you want to change behaviour as well as assess accurately current status
- **Make them action orientated.** Always have an action plan arising out of the conclusions and an action plan 'owner' identified
- **Involve as many of the team as practical.** Too many systems only ask the views of senior clients and the account team, but other stakeholders have valid perspectives which can shed light on current practice and how to improve
- **Be consistent.** If possible, do them at the same time of year, using the same format and approach, so results are broadly comparable
- **Allow time and space for the findings to be discussed honestly.** Creating the forum is as important as the process itself.

**Libby Childs, CEO, Aprais UK<sup>16</sup>**

*See page 64 for suggested further reading on the evaluation and remuneration of agency work.*

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## 8. When things go wrong

Regular evaluation helps ensure that any problems come to light early on, when plenty can be done to solve them. If you are unhappy about something, make sure it is expressed as soon as possible in a face-to-face meeting attended by the most senior figure involved on your side (ie the charity side) of the project.

Ensure you have taken other soundings too and document all positives as well as negatives so that the review can be constructive and fair. Problem areas may fall into one of the following areas:

- Project goals not being met
- Financial problems: over-running costs etc
- Lack of new ideas and initiatives coming out
- Chemistry/relationship problems
- Breakdown of trust.

It's important to remember there may be another side to the argument: try to keep communication channels open or bring in a third party consultant if you need an intermediary.

Hiring an agency is normally a time-consuming, expensive business. So it's worth making every effort to address any problems before you decide to terminate a contract – and that will mean going into discussions with a positive frame of mind.

Perhaps you need to find new approaches to working together; if there are personal chemistry issues, maybe one or two individuals need to step back from the process.



## 9. Moving on

Whenever – and for whatever reason – you and your agency decide to part company, a smart client handles the transition positively, professionally and with good grace. The focus is on getting through the practicalities responsibly so that:

- Valuable brand materials stay safe during the handover
- Contracts are not breached
- Bridges are not burned
- You hang on to your good reputation among agencies.

Remember, agencies are likely to behave professionally during this process: they too want to protect their reputations; they also hope one day to win your account back.

### **The handover**

You need to decide whether the agency should hand everything back to you, or –

if you have already appointed a successor – pass it on to your next agency.

Clearly, by receiving back all the data and materials from the project yourself, you get the chance to check all is in order – and the outgoing agency could be saved any embarrassment at handing over to a triumphant rival.

However, agencies are likely to have a better grasp than you do of what will need transferring and a direct transfer between the outgoing and incoming supplier avoids things going missing via a third party – you. Any communication they have during the handover might also result in a transfer of knowledge as well as materials, which could be an advantage to your project.

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## What should be handed over?<sup>18</sup>

- *All documents, products and materials of client origin*
  - *All third party documents, such as market research reports or audit data, commissioned through the agency and paid for by the client*
  - *All origination used in producing creative communications, which have appeared in the public domain*
  - *All documentation or third party contracts, which may be required, should any modifications to these creative materials be required in future, such as re-titling of a commercial*
  - *All documentation or third party contracts, which may be required for the fulfilment of any future contractual obligations to third parties, such as usage fees or media bookings*
  - *Any documentation containing unused agency ideas or proposals, if they are the intellectual property of the agency by agreement. (See also Paper work page 45)*
-

# References

- <sup>1</sup> From *Communication Strategy: A best practice guide to developing communication campaigns*. IPA, ISBA, MAA, PRCA\*
- <sup>2</sup> More detail on the process of setting a budget can be found in *Finding an Agency: A best practice guide to agency search and selection*. CIPS, IPA, ISBA, MAA, PRCA\*
- <sup>3</sup> From *Institute of Practitioners in Advertising (IPA) interview of marketers and agencies*, as reported by Marketing magazine: [marketingmagazine.co.uk/article/1208898/good-client](http://marketingmagazine.co.uk/article/1208898/good-client)
- <sup>4</sup> From *Why PR needs the Client-Consultancy Partnership Charter*. Martin Bostock, chair, Nelson Bostock Group, writing in his capacity as chair of the Public Relations Consultants Association (PRCA) Council, from 2012/ [prca.org.uk/WhyPRneedstheClient-ConsultancyPartnershipCharter#sthash.FP9IBzxc.dpuf](http://prca.org.uk/WhyPRneedstheClient-ConsultancyPartnershipCharter#sthash.FP9IBzxc.dpuf)
- <sup>5/6</sup> From *Briefing an Agency: A best practice guide to briefing communications agencies*. IPA, ISBA, MAA, PRCA\*
- <sup>7</sup> From *How to brief an agency: a checklist guide to briefing an agency*. Prepared by AAR [aargroup.co.uk](http://aargroup.co.uk)
- <sup>8</sup> *The Marketing & Communications Needs of Charities: summary report of an in-depth research programme*, September 2009 [mediatrust.org/uploads/126633780479421/original.pdf](http://mediatrust.org/uploads/126633780479421/original.pdf)
- <sup>9</sup> PRCA consultancy benchmarking survey 2013. View slideshow of results at [prcaliveshow.studiotalk.tv/chat/prca-benchmarking-2013](http://prcaliveshow.studiotalk.tv/chat/prca-benchmarking-2013)
- <sup>10/13/18</sup> Edited extracts from *Finding an Agency: A best practice guide to agency search and selection*. CIPS, IPA, ISBA, MAA, PRCA\*
- <sup>11/15</sup> Advice on drawing up a Non Disclosure Agreement, together with a sample agreement, can be found in guidance published by the Intellectual Property Office at this link: [ipo.gov.uk/nda.pdf](http://ipo.gov.uk/nda.pdf)
- <sup>12/14</sup> From Client/agency relationships survey – the good and the bad, April 2010. Interviews by Kate Magee [prweek.com/article/998354/top-150-issue-client-agency-relationships---good-bad](http://prweek.com/article/998354/top-150-issue-client-agency-relationships---good-bad) (Louise Fish is now head of Portland Health at Portland Communications)
- <sup>16</sup> Edited extract from *IPA/APRAIS Guidance on Client/Agency Relationship Assessment*, by Libby Childs, CEO, Aprais UK\*

## Further reading/resources

\*Extracts are reproduced here with kind permission of the authors. Full joint industry best practice guides on **Finding an Agency, Briefing an Agency, Communications Strategy, Agency Remuneration** and **Evaluation** can be downloaded from any of the following signatory organisations:

Institute of Practitioners in Advertising (IPA):  
[ipa.co.uk](http://ipa.co.uk)

ISBA – the voice of British advertisers:  
[isba.org.uk](http://isba.org.uk)

Marketing Agencies Association:  
[marketingagencies.org.uk](http://marketingagencies.org.uk)

Public Relations Consultants Association:  
[prca.org.uk](http://prca.org.uk)

### Industry-approved intermediaries/ pitch consultants

AAR Group  
[aargroup.co.uk](http://aargroup.co.uk)

Agency Assessments International  
[agencyassessments.com](http://agencyassessments.com)

Agency Insight  
[agencyinsight.com](http://agencyinsight.com)

The Haystack Group  
[thehaystackgroup.com](http://thehaystackgroup.com)

The Observatory International  
[observatoryltd.com](http://observatoryltd.com)

Oystercatchers  
[theoystercatchers.com](http://theoystercatchers.com)

# Acknowledgements

## Our steering group

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## About CharityComms

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CharityComms membership gives you access to great content, examples of best practice, free seminars and exclusive networking events and a host of opportunities for professional development. Find out more at [charitycomms.org.uk/membership](http://charitycomms.org.uk/membership)  
To explore best practice on a range of comms issues, check out our calendar at [charitycomms.org.uk/events](http://charitycomms.org.uk/events)

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*Make it matter: creating communications strategies in the non-profit sector*

*Show and tell: portraying beneficiaries and service users*

*Branding inside out: a Best Practice Guide to charity branding*

*Perfect pitch: linking voice and values*

*Harnessing the talent: working with celebrities*

*A year in the life: a Best Practice Guide to annual publications*

*CharityComms guide to social media for charities*

*Reading between the lines: trends in charity magazines and newsletters in the digital age*

*Delivering digital transformation: how charity IT and digital teams can work together effectively*

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