## TABLE OF CONTENTS

	7	CHAPTER 3	
About ACA	04	DEFINING THE BEST SEARCH	
A note from the ACA	05	PROCESS FOR YOUR NEEDS	25
Background to this guidebook	06	Traditional approaches	27
Introduction	07	Approaches for specific requirements	29
		Alternative approaches	32
CHAPTER 1		CHAPTER 4	
INITIAL CONSIDERATIONS	09	DEFINING SEARCH PARAMETERS	35
Do you need to conduct an	••••••	Defining parameters	37
agency search?	10	Developing the scorecard	38
Do you have the ok to conduct			
an agency search?	13		
Should the incumbent agency be invited to pitch?	14	CHAPTER 5	
Who should be involved in	17	CREATING AGENCY LISTS	41
your agency search?	15	Defining long lists	42
		The political dilemma	44
		Defining short lists	45
CHAPTER 2			
PREPARING FOR		CHAPTER 6	
AN AGENCY SEARCH	17	PITCH PROCESS LOGISTICS	47
Preparing internally	18		
Preparing externally	20	Contacting and briefing agencies	48
Confidentiality/Non-disclosure		Fees	51
and materials ownership agreements	21	Time and timing	53
Role of procurement	22	Venue	53
Role of a search consultant	23	What about green?	54

## **TABLE OF CONTENTS**

CHAPTER 7			CHAPTER 10			
EVALUATING AGENCIES	55	WH	IAT NOT TO DO!	73		
Search team	56	******				
Evaluating written submissions/agency presentations	57		CONCLUDING THOUGHTS			
Follow-up questions or meetings Notifying winners and losers	58 59					
CHAPTER 8		EXI	HIBITS	7		
FINANCIAL MATTERS	61	1.	Checklist for agency search (internal)	78		
Guiding principles 62 Financial building blocks 63 Types of remuneration agreement 64 Negotiation of variables 66		II.	MarCom agency scope of work (SOW) checklist	80		
		III.	Initial outreach communications example	84		
		IV. V.	Intent to participate form Sample agency search brief for RFI	85 86		
CHAPTER 9		VI. VII.	Confidentiality agreement Ownership of materials form	87 89		
AWARDING THE BUSINESS	67	VIII.	RFI/credentials scorecard	91		
Reference checks	68	IX. X.	Sample agency brief for RFP Scorecards for range of agency SOW	92 93		
Notifying the winner  Notifying the incumbent	68 70 71 72		→ Strategic planning	93		
Transition planning			<ul><li>Media</li><li>Digital</li></ul>	93 94		
Contract			<ul><li>Communications solution/creative development</li></ul>	95		
			→ Direct marketing, loyalty programs	96		
			→ Sponsorship, event and experiential marketing	96		
		XI.	Agency search budget considerations	97		