

Search marketing

selecting an agency checklist for advertisers...

Choosing a search agency can be a daunting task with lots of documents to provide and presentations to sit through. However, the right selection process will ultimately lead to a rewarding and enjoyable working relationship. This checklist should help you remember to tick off some of the more important aspects. It is not designed as a mandatory, rather a guide.

1. What are your reasons for appointing a new agency?

New to search

If this is your first step into search marketing and hiring an agency, work your way through this checklist, but skip part 3a.

Change of agency

If you are changing your search agency the first question to ask yourself is why? There are many reasons why advertisers want to change suppliers, so be honest with your supplier and discuss your feelings. It might be that your incumbent agency can resolve your concerns and help avoid a lengthy, cost and time exhausting pitch process.

Remember an agency's response is only as good as the task given. You are assessing their ability to answer your brief so it is essential to spend the time up front getting the right information together.

You should be able to answer the below questions:

Intellectual property:

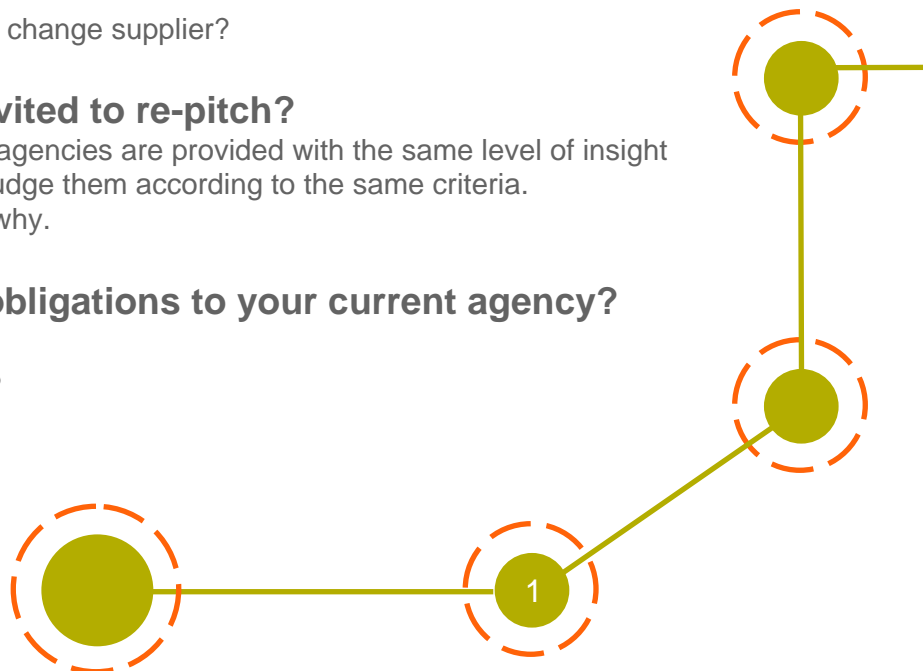
- Do you have detailed performance history for your account?
- Will you be able to transfer search accounts, including search history, to your new agency?
- Do you have the authority to change supplier?

Is your existing agency invited to re-pitch?

- If yes, make sure that other agencies are provided with the same level of insight into your campaign so you judge them according to the same criteria.
- If no, explain to the agency why.

What are the contractual obligations to your current agency?

What is the notice period?



2. Getting your pitch list

The first stage of selecting a new agency is to make a list of the agencies you'd like to know more information about.

Step 1 – Long list

Make a list of all of the companies you think you would like to send a request for proposal (RFP). The RFP (click to download an example template) is a fact gathering operation where you can benchmark like-for-like information and assess the professionalism of their response. Spend the time upfront to try and create a long list, e.g. 8 agencies that match your needs. The more agencies you ask to respond the longer it takes to make your shortlist and the harder it is to make.

Selections can be made using a variety of methods, but don't just look at their websites. Selection can be as much about personnel and their culture as it can be about how up to date their site is. Remember you might find yourself on a train for 4 hours going to a conference, so it's not all about their surface appearance.



Here are a few suggestions on how to make your initial selection.

- Do they have a good track record (case studies)?
- Are they established or are they a start up?
- Do they have a high calibre of clients?
- Do they have experience in your sector?
- Can they work with my roster of agencies?
- Are they a cultural fit?
- Do they have a good reputation?
- Are they in a location I can get to?
- Do they have any clients that could be seen as a conflict?
- Have they won any awards?

A good start is to look at the 3 main registers for search companies:

IAB website members section:

- <http://www.iabuk.net/en/1/iabmemberssearchmarketing.html>

Institute for Practitioners in Advertising (IPA) members section:

- http://www.ipa.co.uk/membership/agency_profile/PROFILE_search.cfm

E-consultancy Search Guide:

- PPC: <http://www.e-consultancy.com/publications/paid-search-marketing-ppc-best-practice-guide/>
- SEO: <http://www.e-consultancy.com/publications/seo-guide/>

Once you have a long list but you are still unsure, phone around and maybe even visit them (chemistry meeting) before you create your final shortlist.





Step 2 – Shortlist (the pitchers)

Once the agencies have submitted an RFP, make a shortlist of no more than 3 agencies to invite to pitch (if you're inviting your existing agency back, this number can go to a maximum of 4). Notify those who did not make the cut and be prepared to explain why.

Step 3 – The pitch

This is the time your shortlist of pitching agencies has to demonstrate that they can answer your brief and convince you to work with them. There are a number of things to consider listed below.

Format:

Agree how you want the session to go.

- A presentation
- Discussion
- Debate
- Workshop
- Demo
- Mixture of the above

Location:

At your offices – easier for you as you can expect the agencies to come to you. It also gives you some indication about how your working relationship will be in the future. If you are going to spend a day in pitches leave plenty of time in-between presentations to:

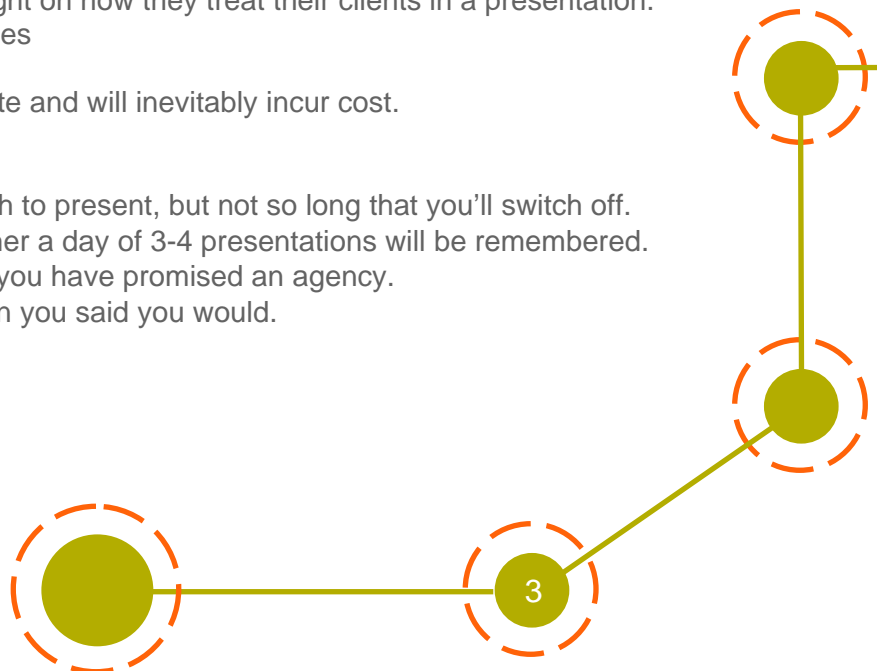
- Gather your thoughts and debrief.
- Allow the agencies to set-up and break down.
- Avoid competitive and sometimes confidentially sensitive agencies meeting in the corridor.

At their offices – gives you an insight on how they treat their clients in a presentation. Encourages you to visit their premises

Neutral – much harder to orchestrate and will inevitably incur cost.

Time:

- Give the agency long enough to present, but not so long that you'll switch off.
- Practically think about whether a day of 3-4 presentations will be remembered.
- Don't change the pitch time you have promised an agency.
- Respond to the agency when you said you would.





People:

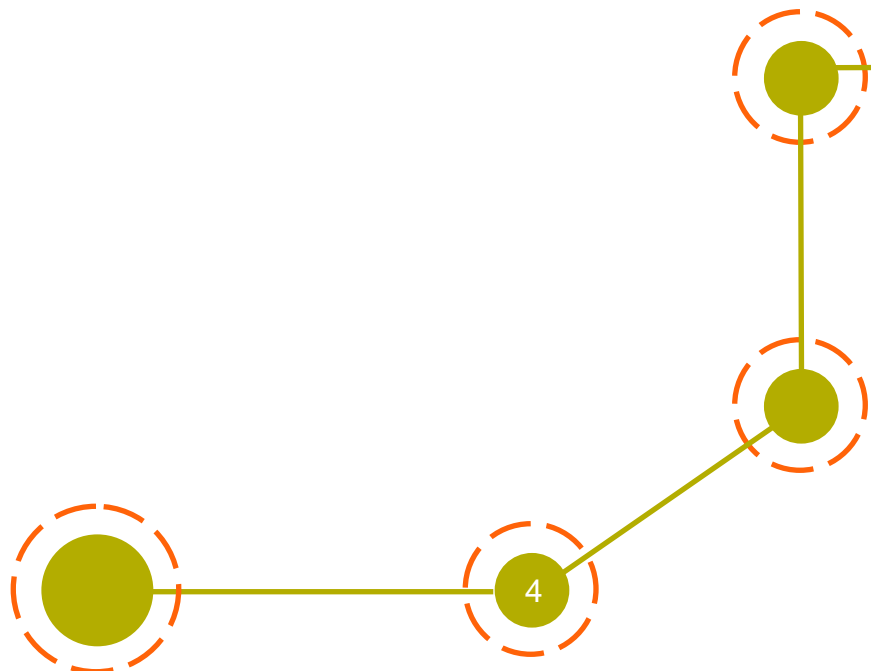
- Make sure the decision makers are in the room (you don't want to have to pitch the pitch to your boss).
- Agree the roles of each attendee before you start.
- Allocate time after the pitches to debrief.

Leave behind:

Agree on what you want left behind (CD, boards, something physical etc).

Etiquette:

- Don't change your personality in the room. The pitchers need to see what you are really like so try and reflect that in the room. Ask questions if that's what you would normally do.
- Explain clearly the next step in the process, e.g. when you will respond.



3. You need to prepare

Be crystal clear on how you want to be pitched to. Start from what will convince you to hire a company and craft the pitch brief around that. For example if 'people' are important, increase the importance of the team and spend time with them. If answering a brief is important get them to answer one. Make one up – it's easier. Pitches should not necessarily have to be about answering an immediate business problem. You don't want to be stuck with liking the people from one agency, the response from another and the location from the third. Settle on what you want and focus the brief on the agency delivering against it.

Here are some elements that may be needed for your brief:

a) Summary of your current search campaign,

- Your current search strategy.
- Your current objectives for return on investment (ROI) and key performance indicators (KPI).
- Your reasons for wanting to change agency.
- A list of what you feel the new agency must definitely do (based on what you like that your current agency does).
- Your key daily / weekly / monthly / quarterly activities.
- Other activities that may be relevant
- The current results of your campaign with a covering non-disclosure agreement (NDA). These results should include the original request for proposal from your current campaign summarising the campaign level KPIs. At the stage of a pitch you should also be prepared to share further information and potentially provide direct (read-only) access to search engine accounts.

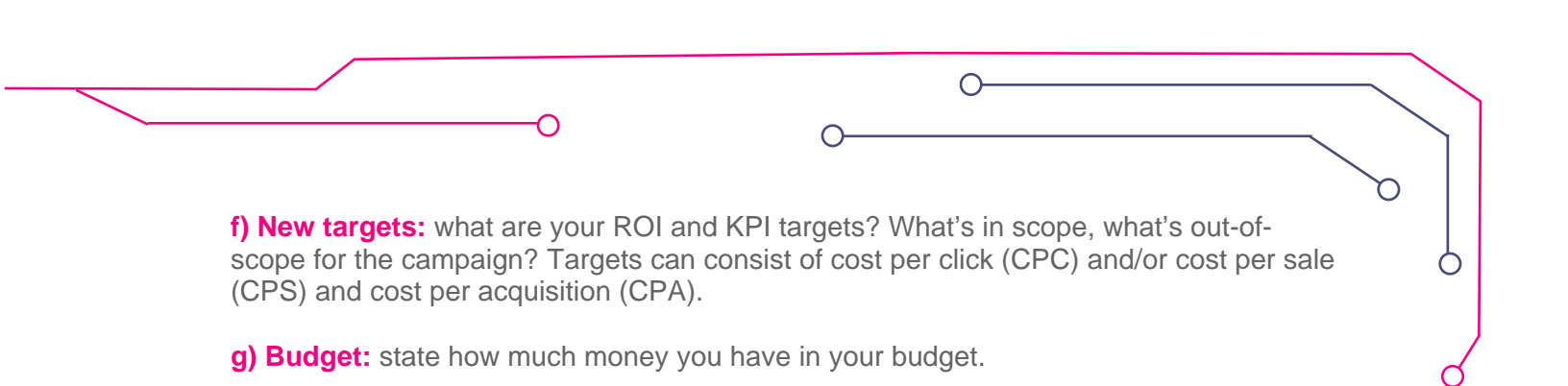
b) Strategy: provide a summary of where search fits into your business and overall online and offline strategy for marketing. Explain all of your future plans. At this point you should also state whether your campaign is to be run in UK/English or a wider geographical/language scope.

c) Tenure of contract: state how long you intend the relationship to last. Be clear if you intend to conduct a review on a regular basis

d) Judging agencies: what are your metrics and criteria for judging new agencies and what are the timescales for the different stages of the selection? Decide how many agencies you want to meet at each stage of the process.

e) Scorecard: ensure you have a scorecard to use for rating each agency fairly. After a day or two of pitches and presentations you'll be grateful for a written report from each pitch. The scorecard should include all of the essential qualities you are looking for from a search agency. Share your criteria for assessment with the agency





f) New targets: what are your ROI and KPI targets? What's in scope, what's out-of-scope for the campaign? Targets can consist of cost per click (CPC) and/or cost per sale (CPS) and cost per acquisition (CPA).

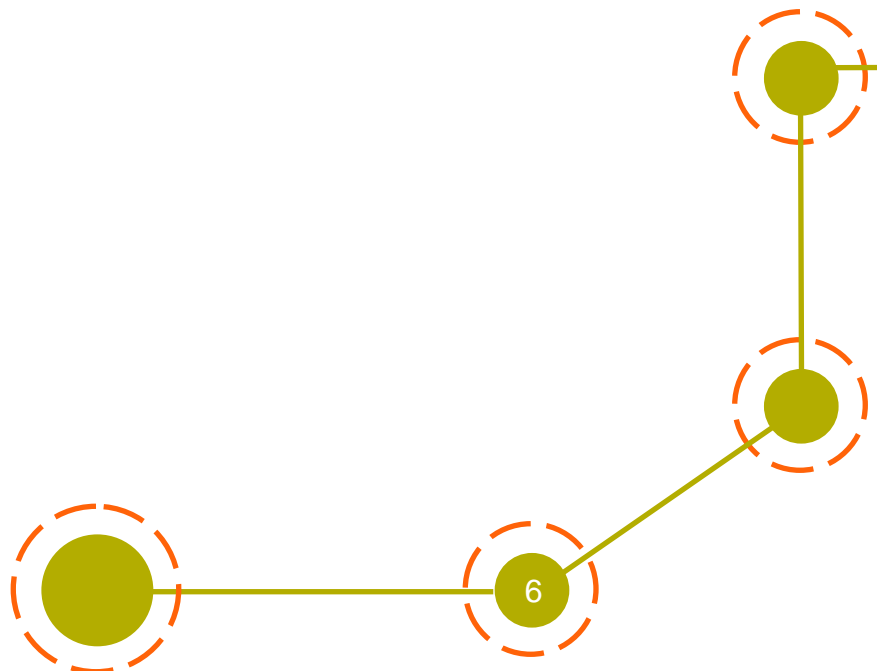
g) Budget: state how much money you have in your budget.

h) Business details: ensure you provide key business details including: the location of your business; the key stakeholders for your search account; the details of your own website and web systems to aid processes like tagging – are your systems basic or complex?

i) Deadlines: at each stage of the process be timely about setting deadlines; both for responses from agencies but equally for your feedback to them. Particularly following a formal pitch; respect the effort the agencies have invested, make a decision and notify the parties in a timely fashion.

j) Feedback: provide feedback to both the losing agencies and winning agencies. Give them a short summary about what you liked and what you felt was weak – don't shirk the responsibility.

k) Time: Make sure you give yourself enough time to not only prepare the shortlist, but also throughout the pitch process. Relationships are key to strong client/agency harmony so free up your diary so that you can meet your shortlist and to answer questions.



4. You should request from agencies

You should decide what information you need to make an informed decision. Make sure that you and your stakeholders have agreed what information is needed before you ask for the information. Don't waste time asking an agency for something if you're not interested in the answer.

Here are some of the common requests:

General information

- Cost of services.
- Measures of success.
- Forecasted resource on the account.
- The scope of the services they can provide.
- Examples of work and case studies (PPC and SEO).
- References.
- Sector experience
- Size of company.
- The size of the proposed team and who the people are.
- How many years experience the agency / account team has (broken down into relevant PPC/SEO experience).
- Technology strategy (e.g. is it their own, do they sell other people's products etc).
- Reporting capabilities.
- Outside UK capabilities.
- Why choose them?



Paid search (PPC)

- Confirmation of Google / MSN / Yahoo accreditation.
- Confirmation that the contract will include the option to share keyword lists during and after campaign.
- Transparency of reporting – what will the agency record and analyse about your campaigns?

Natural search (SEO)

- Proof of adherence to ethical techniques.
- Transparency of techniques – what will the agency do to improve your natural search position?
- Scope of services – will it be consultancy, actual implementation, both or something different?
- Number of employees actively working in SEO.

