

CLIENT CHECKLIST FOR AGENCY SEARCH AND SELECTION

1. Outline scope of work, measures of success, budget
2. Establish agency search criteria: industry sector and communications expertise/experience, size/reach, location, and diversity
3. Develop an agency search timeline
4. Determine if resources available in-house to manage the search or if support needed from a search consultant
5. Conduct a comprehensive review of agencies that match search criteria using agency search tools or search consulting services, and recommendations from a broad range of sources
6. Use a request-for-qualifications (RFQ) process to efficiently review the credentials of candidate agencies to create a shortlist for request-for-proposals (RFP)
7. Identify and appoint a cross-departmental evaluation team to review agency RFPs and be part of finalist presentations
8. Prepare and issue an RFP which includes: scope of work/expectations, budget, comprehensive background on client organization and its communications goals/challenges, agency selection criteria, submission requirements, and a clear timeline with deadlines
9. Create scorecards to evaluate proposals and finalist presentations against measures of success document; evaluate agency ideas, approaches and strategies on an “apples to apples” basis
10. Once a finalist has been selected, allocate time for the on-boarding process which should include briefings, meetings with executives, and setting expectations around reporting and billing