

New Client Guide to Agency Search: A Path to Better Outcomes

Hiring a PR, communications or digital marketing agency is among the most important decisions corporate communications and business leaders make.

In [“A Client’s Guide to PR & Communications Agency Search,”](#) we outline a path to improve agency hiring success.

A Client's Guide to Communications & PR Agency Search

Tips on how to improve search outcomes from professionals who've hired and run agencies

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The Guide highlights what's at stake. Finding the right agency can be a powerful driver of business, brand, and reputation. Getting it wrong wastes time and money – and worst of all may put an organization's reputation, or an executive's career, at risk.

With tens of thousands of agencies and communications professionals to choose from, identifying and hiring the right firm for a specific project shouldn't (in theory) be that hard. But, in practice – as our research, conversations with business leaders, and experience as former heads of communications show – it's often a deeply frustrating experience for both companies/clients and agencies alike. High agency turnover is in part driven by mismatches in capabilities, needs and expectations. This is as problematic for agencies as it is for companies.

Why is it that something that is so important – goes so wrong? What can companies do to increase the odds of hiring an agency that's a good organizational fit, and reduce the risk of failure?

As with recruiting new employees, in the Guide and our other [Agency Search Resources](#), we argue that having the right process matters when it comes to evaluating, selecting and engaging an agency. But under time pressure and with the goal of generating results as quickly as possible, all too often companies are tempted to take shortcuts – shortcuts that aren't typical when hiring people.

Among the issues we see: rather than casting the net wide enough to seek out agencies that may not be known, there's an over-reliance on word-of-mouth recommendations. In fact, research for our 2017 Agency Search Report shows 76% of respondents using word-of-mouth recommendations from peers to find agencies. And, while research and experience show some use of a formal RFP process for agency hiring, many organizations skip this for all but the largest projects. Finally, diversity all too often is not factored into formal or informal searches.

We suspect none of this likely comes as a surprise. Neither will the idea that that shortcuts may take you down what can be costly dead ends.

The Guide outlines key steps that should be part of the agency or consultant search to achieve better outcomes. These include:

- Draft a measures of success document to use as the North Star for your search
- Have an approved and clearly defined budget before starting a search

- Conduct a comprehensive agency search that goes beyond who you know to identify the most-qualified agencies for an agency of record assignment or project
- Identify agencies by industry and communications expertise, location, size, clients and other criteria based on your measures of success document
- Use RFQs (Request for Qualifications) and RFPs (Requests for Proposals) as due diligence tools to request information, shortlist and select agencies
- Include diverse firms and diversity as a part of the agency search process
- Use finalist presentations to evaluate chemistry as well as substance
- Plan to invest time for agency onboarding and align expectations around billing and reporting from day one

A well-managed agency search and onboarding process is essential if you are going to build a strong agency-client relationship – and it is the foundation for achieving business goals and ultimately award-winning work. It's also a powerful way to reduce agency turnover and generate stronger agency ROI.

In the same way dating was revolutionized by internet services and apps, it's important to recognize that technology provides new opportunities to identify and engage agencies and save time in the process.

CommunicationsMatch™'s [agency search](#) and online [RFP platform](#), developed with RFP Associates, simplify the search and agency hiring process. Using these or other tools, comprehensive searches can be quick and efficient. And, requesting information from agencies and issuing an RFP becomes a simple, manageable process. For companies where bandwidth for agency search is an issue, it's worth thinking about hiring search consultants. Our range of [Agency Search Consulting](#) services leverage our platforms to provide everything from search support to turn-key management of the entire search process.

The bottom line is agency search will change. Driven by technology, the search process will become more rigorous, transparent and efficient. Technology is part of the solution. To find the best 'match' between client and agency, an effective search process continues to require more qualitative checks of fit, feel and chemistry. Having a 'guide' to help companies, especially those who have not necessarily been down this path, ask the right questions and evaluate agencies is another key element to achieving desired outcomes.

About the Authors

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Locke developed and launched CommunicationsMatch, an agency search and engagement platform with 5,000 listed firms and professionals in 12 countries, to help companies find and engage agencies, consultants and freelancers that match needs. A founder of communications agencies and startups, he previously headed communications functions at Prudential Financial, Morgan Stanley and Deutsche Bank.

Steve Drake and **Robert Udowitz** founded [RFP Associates](#) in 2011 after observing the agency selection process from "both sides of the aisle" and recognizing the need to streamline and improve the way searches are made and agencies selected from an honest, unbiased approach. Over the course of their careers Robert and Steve have worked at agencies, corporations, and trade associations in New York, Washington, and, for Steve, in Beijing, China, where he opened Fleishman-Hillard's first Asian office. In recent years they have also been sole practitioners for a variety of clients seeking media, crisis, and strategic counsel.