

# PROCUREMENT BRIEF TIPS FOR CONDUCTING AGENCY SEARCH

AUGUST 2019

This document outlines the types of information that should be included in a Request for Proposal (RFP)/ procurement brief so that bidding agencies understand the scope of the assignment, certain legal requirements and the agency selection process, including submission content, presentation instructions and evaluation criteria.

Clients can adapt this material to reflect the assignment at hand and the specific process and requirements that they wish to include.

This document contains the following sections:

1. Procurement Brief Contents
2. Capability Presentation Instructions
3. Evaluation Criteria
4. Post-Award Notes
5. Format for Submissions to the RFP

This is one of a series of tools developed by the Canadian Marketing Association to help strengthen the RFP process. Our toolkit was developed following the creation of a series of best practices in agency search, through a collaborative process with representatives of the client and agency side working together. Our goal is to ensure the process is fair and respectful, resulting in better outcomes for all participants.

## PROCUREMENT BRIEF CONTENTS

### BACKGROUND/CONTEXT

*What bidding agencies need to know:*

- A brief description of who you are as an organization.
- A brief description and, if relevant, brief history on your product(s), your issue or opportunity.
- Relevant, contextual and concise information about what has brought you to the point of requiring or wanting to communicate.
- The names and roles of the people who will evaluate agency submissions and presentations, and designated client contacts.

*What bidding agencies don't need:*

- A download of your organization's history, identity, vision and purpose.

### WHAT IS THE PROBLEM OR OPPORTUNITY?

*What bidding agencies need to know:*

- A detailed description of specifically what the problem to be solved is or what the opportunity to be capitalized on is.

- A detailed description of what **measurable** outcomes your organization will want to see as a result of your actions/investment (e.g.: a 15% increase in registration over a six-month period; a 40% increase in awareness of the new product across Canada).
- A detailed description of your target group(s) as you currently understand them.

*What bidding agencies don't need:*

- Excessive extraneous information that can obscure the central goal of the assignment at hand, such as detailed descriptions of the overall goals and purpose of your organization that go beyond what is needed to provide necessary context.

## **DEFINING OBJECTIVES AND REQUIREMENTS**

When defining objectives and requirements, be sure to indicate the key motive, e.g.: don't ask for strategy or creative if the real goal is to achieve cost efficiencies.

Think of your business concern(s) that the new agency partners need to solve, and indicate whether:

1. The selected agency will be your exclusive service provider?
2. Whether the assignment is a trial of the relationship or a firm commitment?
3. Whether you need a full-service agency or a specialist?
4. What capabilities must the new partners have to deliver speed-to-market requirements?
5. What (if any) industry or category expertise is required?
6. What strategic and research needs are required from the agency, such as understanding customer segmentation and/or social media-platform expertise?
7. How important is agency location? Same city, province or anywhere?
8. Indicate the timeframe for the assignment. Does it have a defined end-point? Is it short-term or ongoing? Are there time commitments that need to be met (e.g.: a specific date for the launch) or steps/stages that have already been determined?

## **SEARCH TIMING**

While searches for smaller assignments or reviews that entail a modest scope of deliverables and meetings could move more quickly, the **optimal timing for the agency search process should be approximately three months:**

- Identification Phase – Request for Information (RFI): One to two weeks.
- RFI: Two to three weeks.
- Chemistry meeting: Two to Four weeks (this can vary depending on the Statement of Work and how many agencies have made the short list from the RFI). Recommend 3 agencies or max 5.
- RFP: three to five weeks (includes a written Q&A period within the first two weeks of the RFP).
- Final Presentation date.
- Notification to agencies date.
- Contract negotiation and informing agencies: Two to Four weeks. **Non-winning agencies should be formally advised within one week of the winning agency being advised of its success.**

## **WHAT DOES THE AGENCY NEED TO DO?**

*What bidding agencies need to know:*

Your best understanding of what, specifically, the agency is going to need to do for this assignment. For example:

- Assist with the development, execution and summary findings of stakeholder research.
- Assist in the development of a strategy to address research findings.

- Assist in the development of a target audience and personas.
- Develop and execute a multi-channel communication that will almost certainly include the following media.
- Launch a supporting social media campaign (indicate the potential/priority channels).
- Make recommendations for updating our website.
- Routinely present progress to the client's Board.

*What bidding agencies don't need:*

- Vagaries.
- Table stakes (e.g.: strong creative, a solid account service team).
- Items that are not part of procured services (e.g.: staff training programs).
- To discount agencies who fail to present case work that include aspects that we failed to mention in the brief.

## **ARE THERE ANY SPECIAL ISSUES OR CONSIDERATIONS?**

*What bidding agencies need to know:*

Issues or considerations that may direct how an assignment is approached. For example:

- The launch materials will need to be completed before a specified date.
- Indicate whether there is a need to communicate in specific languages and in specific communities.
- Indicate whether there are any separate stakeholder groups that will need to be consulted (national, regional or specific geo-targeted area).

## **WHAT ARE THE MULTICULTURAL AND/OR INDIGENOUS REQUIREMENTS?**

*What bidding agencies need to know:*

Communicating in both official languages, in some channel(s), is a requirement for advertising. If there are specific multicultural and or indigenous targets, they should be identified so agencies can determine whether they need to include a partner in the bid.

## **BUDGET**

What do you think the agency fees will be? If unknown, what is the total budget you are working with?

*What bidding agencies need to know:*

To give the agency some sense of the scope of the project or relationship and the resources they will need to bring to this assignment, and, by extension, what case work they should bring to the competition as a solid comparative to your assignment, indicate what you expect the budget to be annually and/or over the course of the assignment, excluding media expenditures. Include approval process and other requirements.

## **COMPLIANCE WITH ACCESSIBILITY LAW**

Indicate if your jurisdiction requires that content be fully accessible and comply with laws and best practice accessibility formats/guidance (e.g.: the Accessibility for Ontarians with Disabilities Act (AODA), including the World Wide Web Consortium's Web Content Accessibility Guidelines (WCAG) 2.0 level AA.) It would be helpful for you to include a summary of the requirements.

For example, in Ontario, mandatory communications standards include accessible font characters, minimum font size, colour contrast between text and background, clear language and design, no text on images, structurally tagged PDFs, not using Flash, low-vision options, keyboard only commands, use of voice-overs, transcripts/captions and descriptive video for online videos/TV content, etc.

## CONTRACTOR SECURITY SCREENING

The selected agency and its recommended project team (including any subcontractors) may be subject to contractor security screening before this assignment may be awarded and the Letter of Agreement signed.

Provide an indication as to whether the supplier will be working with pre-publication or sensitive information.

## CAPABILITY PRESENTATION INSTRUCTIONS

- Candidates will have 30 to 45 minutes to present, followed by Q&A, if required.
- Agency will provide panelists with the names and titles of participants in the presentation printed on company letterhead.
- Agency should provide the Cost Proposal (blended hourly rate only) as a leave behind.
- Agency should provide a hard copy printout of their presentation deck as a leave behind (8.5"x11" is sufficient).
- NO speculative material of any kind is allowed (e.g.: strategic or creative recommendations).

## EVALUATION CRITERIA

Candidate agencies will be evaluated based on the following criteria:

- 35% Demonstrates Insight into the Assignment.  
*Agency discusses observations/impressions on the challenge without making any recommendations.*
- 35% Parallel Experience.  
*Agency demonstrates how they have handled a similar problem or opportunity. Results are required.*
- 20% Staffing Plan for this Assignment.  
*Agency outlines team structure and rationale for key members. Account Lead is required in presentation.*
- 10% Cost proposal.  
Provide one (1) blended hourly rate for services, broken out as:  
*Net Blended Hourly Rate + HST = Total Blended Hourly Rate*

## POST-AWARD NOTES

- Client organizations will provide the necessary briefings on Client's visual identity guidelines, and communications requirements under accessibility law for their specific projects.
- Specialized multicultural services will be subcontracted by the successful supplier to ensure alignment with client requirements.
- All production and third-party deliverables are subject to the required competitive bid processes (see Master Agreement) unless the Client advises otherwise in writing.

- All media will be billed to the client at net by the contracted media planning and buying Agency of Record.
- The selected agency and recommended project team (including any subcontractors) may be subject to contractor security screening (refer to Security Clearance Checks in the Master Agreement) before the Letter of Agreement may be finalized.
- All other terms and conditions of the Master Agreement will apply to this assignment.
- The Letter of Agreement must be completed within 10 business days, or the assignment may be declared null and void.

## **FORMAT FOR SUBMISSION TO THE RFP**

Please provide the following information.

### **SECTION 1: Agency General Information**

- Full legal name and affiliations with holding company.
- Address and contact information.
- List of Canadian audiences.
- Number of employees in Toronto and Montreal offices.
- Current customers/products/revenue.
- List five largest clients and the percentage volume each represents of agency revenues.
- Customer references – provide 2 references with client company, contact name, and title, phone and email.

### **SECTION 2: Presentation of Your Agency**

- Description of your agency, its brand and DNA.
- Key personnel/biographical notes (including personnel who may be assigned to the business and why they are suited to the account).
- Your creative approach, your strategic planning and creative development processes and how you work with your clients to develop effective creative.
- How you would structure your team to support Chartwell if your agency is selected.
- Your agency's expertise in traditional, digital and social media.
- Services and capabilities (including services offered by affiliates or suppliers).
- Business success track record and key success factors.
- Please provide two client references.

### **SECTION 3: Experience Relevant to Clients Business Description**

#### **Background, Target Audiences**

Describe primary audience for marketing to. Include regional differences.

#### **Challenges/Case Study Considerations For The Agency**

1. Please describe a case where you have successfully kept a brand leader in the leadership.
  - Opposition in an extremely competitive market.
  - How does the case relate to the Client?
  - What questions would you have?
  - What would you see as challenges?
2. Please describe a case where you have successfully differentiated a service brand in an extremely crowded market?
  - How does the case relate to the Client?

- What questions would you have?
  - What would you see as a challenge?
3. What is your internal process for translating a national campaign to a regional or local level?
- How did the process work? Was it successful?

#### **SECTION 4: Capabilities and Point of View**

How have you managed when digital SEM and SEO and display are managed internally by the Client?

#### **SECTION 5: Proposed Fee Structure**

##### **Historical**

- Media: Client media has been purchased at Net with % commission as compensation for the media agency.
- Agency: Fees paid via blended hourly rate based on Estimates.

##### **Proposed 2020 Budget**

How does your agency develop fee proposals, ensuring full transparency and respecting budgets? The funds outlined below cover the following:

- Strategic planning, media planning, creative planning and development, account management and all other fees.
- Media, excluding digital.
- Taxes.
- Production.
- Talent.
- Music rights.
- Out-of-pocket expenses.

##### **Timeline and Spend**

January – June, 2019 National campaign media has been planned and purchased by media agency. This decision was made to ensure we benefited from best TV rates and inventory and leverage the momentum of our Q4 TV and web TV campaign. The spend is \$0,000,000 GROSS.

- All costs include applicable taxes.
- Fees and Production split for 2020 is fixed, total budget is however the % split is flexible.
- Digital search and display are for local and/or customer journey. This “digital media” budget is not open to the agency.

Note: All financial information will be held in commercial confidence.

#### **Next Step and Timetable**

##### **Phase 1 Intent to Participate: Due (insert date here)**

- Agencies email signed Confidentiality Agreement (insert date here) and RFP sent (insert date here) once signed Confidentiality Agreement returned.
- Agencies have until 12:00p.m. (insert date here) to confirm participation, by email to Client name and Email address.

**Phase 2 Proposal Submission: Due date (insert date here)**

The core selection team will review agencies' expertise based on the RFP presentation documents.

**Phase 3 Finalist Presentation (insert date here)**

- The agencies will be asked to present their expertise document to the core selection committee.
- Presentations will be held at the agency and will be no more than 1.5 hours, including question period.

**Phase 4 Final Decision / Preliminary Agreement: (insert date here)**

The winning agency will be selected. A viable business agreement will be elaborated and a service contract, including scope of work, compensation, responsibilities and roles, will be confirmed. The selection process and the final decision are expected to be completed before (date Here).