



BEST PRACTICES IN AGENCY SEARCH FOR PR/COMMUNICATIONS AGENCIES

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The Canadian Marketing Association (CMA) recently revised its [Code of Ethics and Standards of Practice](#) to include a section on Agency Search (section R), as it relates specifically to Requests for Proposals (RFPs). This section lays out seven principles that members should follow to support professionalism and fairness for the mutual benefit of clients, agencies, consultancies, procurement partners and the Canadian marketing industry, as a whole.

One principle of note: *“The CMA strongly discourages RFP requests for speculative creative or strategic work during an RFP process.”*

So, how does this apply to RFPs for PR/communications support? If you can’t ask for creative or strategy work, how can you gauge which agency is right for you?

The most successful searches and agency partnerships begin with a focused understanding of your brand’s needs and how a PR agency can support those needs.

WHAT IS PUBLIC RELATIONS?

The Canadian Public Relations Society defines public relations as the “strategic management of relationships between an organization and its diverse publics, through the use of communication, to achieve mutual understanding, realize goals and serve the public interest.”

To accomplish such a broad mandate, public relations encompasses a myriad of communications skills. These may include:

- Brand and Reputation Management
- Change Management
- Consumer Communications (B2C)
- Content Creation/Brand Journalism
- Corporate Communications (B2B)
- Corporate Social Responsibility
- Digital and Social Communications
- Event Management
- Executive Visibility/Speechwriting
- Financial Communications
- Influencer Marketing
- Internal Communications
- Investor Relations
- Issues and Crisis Management
- Media Relations
- Public Affairs/Government Relations

SPECIALTY VS GENERALIST?

In addition to the above list of services, public relations professionals work across multiple industries. Some practitioners and agencies specialize by sector expertise. Others provide a more full-service offering across multiple industries. The range from specialty to full-service agencies is vast.

If you choose an agency that specializes by sector, you’ll need to first determine if you are comfortable working with a team of people who may also be working on your competitors’ business.

The obvious benefit of a sector-specific agency is its deep industry knowledge and network of media relationships. Fashion, beauty and travel/tourism are industries that tend to service multiple clients from the same industry. Potential conflicts can be minimized by executing and adhering to strict non-disclosure agreements (NDAs).

Agencies can also specialize by service. These are solid options if you have identified a specific need such as investor relations, public affairs or event management, for example.

A generalist agency can provide comprehensive support for various facets of your business. Generalist agencies often have network or partner offices in other geographies which may be especially desirable if you are a global brand with multinational communications needs. If your agency prospect has partners, be clear about whether it matters to you whether they are virtual or part of an established bricks and mortar network. Both scenarios can work seamlessly. Just make sure your generalist agency is able to scale their services so that you only pay for what you need when you need it.

WHAT CAN I ASK FOR IN A PR RFP?

Rather than ask prospective agencies to brainstorm and present solutions for current, real time challenges to your brand, which would entail providing speculative strategic or creative work for free, below are some questions that will still help you find the right agency partner for your needs:

- How would you approach a challenge (one aspect of something real or a fictional example)? Two options to help you understand how the team thinks and their problem-solving protocol for this can include:
 - A prepared presentation
 - A working session – problem solving in real time
- Have you won awards for work in our industry, on solving a similar challenge?
- Is the presenting team the actual team who will work on your business? Chemistry is important to build a strong client/agency relationship. Every agency is filled with brilliant professionals. Is this team the one you want to and will work with?
- Is the prospect connected to your industry through relevant memberships? Do they have industry accreditation and demonstrate thought leadership?
- Can the agency provide relevant case studies with strong, measurable results?
- Can the agency provide relevant client and industry referrals?

Effective communications can reinforce and protect the value of corporate brands. As PR plays a more prominent role in the marketing mix, your search for the right partner takes work– but with careful planning, the process can be both efficient and rewarding. To find the right partner, you need to be a good partner. A successful client/agency relationship requires mutual respect and fair practices from the start.

Note: This is part of a multi-series toolkit. [Find out more.](#)