AGENCY SELECTION CHARTER

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AGENCY SELECTION CHARTER

At a Glance (quick 4 page guide)

Why This Charter Exists

Agency selection is one of the most important commercial decisions marketers make. Done well, it leads to stronger partnerships, better work, and value creation. Done poorly, it wastes time and money, damages trust and often delivers weaker outcomes for both marketers and agencies.

This Charter sets out the **benchmark for responsible agency selection**. It draws on global best practice and is adapted for South Africa's regulatory, procurement, governance, and transformation realities. This Charter is designed to support marketers under pressure to deliver growth, manage risk and comply with governance, not to add unnecessary complexity. The Charter has been developed by the ACA (Association for Communication and Advertising), the AMF (Advertising Media Forum) and the IAB (Interactive Advertising Bureau), collectively representing the broader communication industry. While technicalities may differ for different specialisation in the industry, the core philosophy and intention of this Charter is applicable to all.

It recognises:

- Procurement and governance constraints faced by marketers
- The significant investment agencies make when pitching
- The need for fair, transparent, and commercially realistic processes

This is **not a mandatory code**. It is an industry benchmark designed to improve how competition is run , not to remove competition.

What This Charter Asks For

From marketers:

- Fewer, better-designed pitches
- Clear briefs, realistic timelines, transparent budgets, scoring criteria/weighting
- Disciplined shortlists and genuine intent to appoint

From agencies:

- More selective participation
- Honest assessment of fit and capacity
- Collective consistency around minimum standards

The goal is simple: **better decisions, better partnerships, better outcomes**.

The Advertising Industry Benchmark Standards: Summary

We consider the following to be hallmarks of responsible agency selection:

1. **Fairness and transparency**
   Clear evaluation criteria, clear visibility and access to senior decision makers at key points in the process, and communication clarity throughout the process.
2. **Disciplined shortlists**
   Overly large pitch lists dilute attention and waste resources. Shortlists should include only agencies with a genuine chance of winning the business (this includes the encumbent agency). As a guideline:
   - Request For Information (RFI) stage: 7 to 10 agencies max (information only, no costings at this stage)
   - Chemistry Meetings: Ideally no more than 5 agencies – intention, to short list the final agencies to be briefed on a project, or to submit a response.
   - Request For Proposal (RFP) stage: ideally 3, and no more than 5 agencies
     For more info on how this works, click on the links.
3. **Adequate time for meaningful participation**
   Realistic timelines that allow agencies to produce thoughtful, high-quality responses. Detailed RFI's require significant input, so a minimum of 14 working days should be allowed. Where Strategic, Creative or any detailed responses are required in RFP, they should allow at least 15 - 21 working days.
4. **Protection of intellectual property**
   Pitch work remains the property of the agency unless explicitly agreed otherwise. Agencies are encouraged to log their pitch IP on the ACA IP Portal, which provides a secure file and timestamp.
5. **Clear and comprehensive briefing**
   Including targets and marketing / business strategy and context, scope of work, expectations, and budget (or budget range) at the outset.
6. **Pitch fees where significant work is required**
   Recommended particularly for strategic and/or creative development in the RFP stage.
7. **Proportionate approach for smaller accounts and projects**
   Use credentials and chemistry meetings, and a project that showcases strategic thinking rather than full creative pitches.
8. **Meaningful inclusion**
   Supporting black-owned and SME agencies through fair, considered participation.

While these standards are not enforceable rules, they are **norms we encourage the industry to align around**.

For agencies to evaluate whether a pitch is compliant with this charter, these points must be in place:

- Disciplined shortlists
- Adequate time
- Clear and comprehensive briefing, including Scope & Budget

- Protection of Intellectual Property
- **Pitch fees are recommended but not formally mandated.This is a discussion the agency must have with the client. Recommended tiers are further in this document, as guidelines. The actual amount must be negotiated.*

How a Responsible Pitch Process Works

The Charter recommends a **three-stage approac**h that reduces wasted effort and improves decision quality on both sides and gives unsuccessful agencies clear guidance on where they can improve.

1. Pre-selection

- Confirm a pitch is necessary – projects can be briefed without competing!
- Explore whether issues can be resolved with the incumbent
- Define needs vs wants
- Align marketing, procurement, legal and leadership internally

2. Managing the process

- Issue a clear and concise RFI to a maximum of 10 agencies,in order to reduce to a realistic shortlist of between 3 and 5 agencies.
- Use chemistry meetings to assess fit
- Run focused RFPs with clear briefs, budgets and evaluation criteria
- Offer pitch fees where a full strategic, creative and media solution is required in the pitch.
- Maintain consistency of decisionmakers through the process
- Download the process checklist here

3. Transition

- Communicate outcomes respectfully
- Provide feedback
- Allow realistic handover and onboarding timelines

Governance & Accountability

While the industry associations cannot mandate compliance, we will offer confidential, independent mediation and advice, identify recurring patterns of poor practice and determine appropriate sanctions, and engage discreetly with organisations to encourage alignment with best practice. Over time, the Charter will help shape which marketers agencies choose to work with and how competitively they engage, and which agencies marketers regard as credible long-term partners, strengthening the industry through clear expectations and consistent behaviour.

To read the Full Charter, see below.

AGENCY SELECTION CHARTER

Executive Summary

The Agency Selection Charter sets out a clear industry benchmark for how marketers can run more effective, fair, and commercially responsible partnership selection processes.

Agency selection matters. Done well, it leads to stronger relationships, better work, and mutual value creation. Done poorly, it wastes time and money, damages trust, burns talent, and often results in suboptimal outcomes for both marketers and agencies. Globally and locally, there is growing recognition that traditional pitch processes have become unnecessarily complex, resource-intensive, and misaligned with how modern marketing partnerships deliver value.

This Charter responds to that reality. It is informed by global best practice (including guidance from VoxComm, the World Federation of Advertisers (WFA), the Institute of Practioners of Advertising (IPA, UK) and the Incorporated Society of British Advertisers (ISBA)) and adapted for South Africa's regulatory, procurement, and transformation context by the three major industry associations: the ACA (Association for Communication & Advertising), the AMF (Advertising Media Forum) and the IAB (Interactive Digital Bureau). It recognises the real constraints marketers operate under, including procurement frameworks, governance requirements, global alignment, and mandatory review cycles , while also setting clear expectations for responsible agency selection behaviour.

The Charter has three core components:

1. Benchmark Standards
A set of principles that define what we consider good, responsible practice in agency selection. These standards are not mandatory, but they represent the industry's shared view of fairness, transparency, commercial realism, and respect for intellectual property and people.

2. Shared Responsibilities and Governance
The Charter recognises the significant pressure marketers face to deliver growth, manage risk, and comply with procurement and governance requirements, often simultaneously.

3. A Practical Process Guide
A structured, staged approach to agency selection , from pre-selection and pitch design through to transition and onboarding , designed to reduce wasted effort, improve decision quality, and support better long-term partnerships.

Clear behavioural commitments from both agencies and marketers, alongside an independent, non-binding mediation mechanism to support constructive resolution where concerns arise.

This Charter does not seek to eliminate competition, nor to protect agencies from competitive pressure. Instead, it aims to improve how competition is run, so that marketers can identify the right partners more effectively, and agencies can make informed decisions about where to invest their time, talent, and creativity.

The industry associations cannot mandate compliance with this Charter. However, it establishes a clear industry benchmark. Agencies are encouraged to align with it and, where appropriate, to decline processes that fall materially short of these standards. Marketers who adopt these practices are more likely to attract stronger agency participation, better thinking, and more sustainable partnerships.

The industry is stronger when expectations are clear, behaviour is consistent, and both sides take responsibility for improving how agency selection is conducted.

Section 1: Benchmark Standards for Responsible Agency Selection

The following standards reflect our view of responsible, professional best practice in agency selection. They are intended to guide decision-making, set expectations, and establish a shared reference point for agencies and marketers.

These standards are not legally enforceable. They are normative , designed to influence behaviour through collective alignment, transparency, and consistency across the industry.

1. Fairness, Objectivity and Transparency

Agency selection processes should be fair, objective, and defensible. They should be run in a way that would withstand internal governance scrutiny and external review, with clear evaluation criteria, consistent decisionmakers, and transparent communication throughout the process.

2. Disciplined Shortlisting

Overly large pitch lists dilute attention and waste resources. As a guideline:

- RFI stage: no more than 10 agencies
- Chemistry Sessions: no more than 5 agencies
- RFP stage: ideally 3, and no more than 5 agencies

Shortlists should include only agencies with a genuine chance of winning the business.

3. Adequate Time for Meaningful Participation

Good practice requires sufficient time for agencies to respond properly.

As a general guideline:

- **RFI stage:** 7–10 working days (information only)
- **RFP stage (**prep of RFP and pitch meetings)**:** a minimum of 15 working days (can include strategy, creative, detailed rollout and indicative pricing).
- **Contracting stage**/SoW development and sign-off: ideally done in 21 working days.

Timelines should account for clarification cycles, public holidays, and seasonal constraints. December and early January pitches should be avoided unless genuinely unavoidable.

Unrealistic timelines reduce the quality of submissions, limit participation by the strongest agencies, and place unnecessary pressure on people.

4. Protection of Intellectual Property

All strategic and creative work developed during a pitch remains the intellectual property of the agency unless explicitly agreed otherwise in writing.

Using ideas from unsuccessful pitches without permission or compensation is considered poor practice and undermines trust in the selection process. Agencies are encouraged to submit their work to the ACA IP Portal for added protection.

Mutual NDAs are recommended to protect both parties.

5. Clear and Comprehensive Briefing

Marketers should provide a clear, complete brief at the outset, including:

- The business and communication challenge
- The scope of work and deliverables
- The scale of the business
- The budget, or a realistic budget range

Transparent briefing enables agencies to assess fit, commercial viability, and whether to participate. Processes that withhold critical information tend to result in wasted effort, misaligned proposals, and failed negotiations later.

6. Pitch Fees for Significant Strategic or Creative Scope of Work

Where a pitch requires significant strategic and/or creative development, marketers are encouraged to offer a pitch fee to offset hard costs.

Pitch fees signal respect for agency investment, improve participation quality, and reduce speculative pitching. The pitch fee should be proportionate to the scale and complexity of the ask and the budget. (Recommended fee range: R50,000 to R125,000 is suggested for pitches requiring both strategic and creative deliverables, but it should be the agency's discretion to quote a fee they feel represents the value of the required Scope).

Payment of a pitch fee does not transfer ownership of work.

7. Proportionate Approach for Smaller Accounts and Projects

For smaller accounts or one-off projects, full creative pitches are often unnecessary. Credentials, case studies, chemistry sessions, and strategic think pieces are usually sufficient and more efficient for both parties.

8. Inclusion with Intent

Where possible, marketers are encouraged to include black-owned and SME agencies at the exploratory stage. Inclusion should be meaningful , agencies should be given a fair opportunity to win, not included to satisfy process optics alone.

9. Collective Responsibility

The industry associations believe that industry norms shift through consistency, not coercion. Agencies are encouraged to align around these standards and, where appropriate, to decline processes that fall materially short of them. Marketers benefit most when agencies are able to engage fully and selectively, rather than participating by default.

The shared objective is the same for both parties: to identify the best possible partner and set the relationship up for long-term success.

Section 2: Shared Responsibilities and Governance

Agency selection is not a transactional exercise. It is a significant commercial, reputational, and human investment for both marketers and agencies. While competition is essential, the way competition is designed and managed has a direct impact on decision quality, partnership success, and the sustainability of the industry as a whole.

This section sets out the **shared responsibilities** that underpin responsible agency selection. It is not intended to moralise, prescribe behaviour, or interfere with commercial decision-making. Instead, it clarifies the **behaviours and commitments** that most consistently lead to effective outcomes , regardless of organisational structure, procurement framework, or governance model.

We recognise that marketers operate within complex constraints, including procurement mandates, audit requirements, global alignment, and mandatory review cycles. It also recognises that agencies make substantial upfront investments of time, talent, and intellectual capital when participating in selection processes, often without compensation or certainty of return.

For this reason, improving agency selection cannot rely on enforcement or regulation alone , nor would that be appropriate in a competitive market. Change depends on **shared accountability**, **clarity of expectations**, and **collective consistency** across the industry.

The commitments outlined in this section are **voluntary and non-binding**. They are intended to:

- Support more effective, defensible and efficient selection processes
- Reduce unnecessary friction, waste and disengagement
- Encourage behaviours that attract stronger participation and better long-term partnerships

Governance, in this context, is about **guidance, mediation and norm-setting** , helping both marketers and agencies address concerns constructively and continuously improve how agency selection is conducted.

Over time, organisations that align with these shared responsibilities are more likely to be recognised as credible, professional and desirable partners. Those that consistently fall short may find that agency participation, trust and engagement diminish , not through enforcement, but through informed choice.

2.2 Marketer Responsibilities

Responsibilities of Marketers in Agency Selection

Marketers play a central role in shaping the quality and effectiveness of agency selection processes. We know that many marketers operate under significant pressure, balancing business performance, procurement mandates, audit scrutiny, internal politics, global directives, and compressed timelines, often with limited internal resources.

Within these constraints, the following responsibilities are intended to support **defensible, efficient and effective decision-making**, rather than add unnecessary burden.

Marketers are encouraged to:

- **Be clear about intent**
  Confirm that a pitch has a genuine purpose and a real intention to appoint. Pitches are most effective when they are not run solely to test the market, gather ideas, or satisfy internal optics
- **Approach an appropriate number of agencies**
  Shortlists should be disciplined and proportionate, focusing on agencies that are realistically capable of delivering the required scope and have a genuine chance of winning.
- **Provide a clear and workable brief**
  Ensure briefs are internally aligned and approved before release, setting out the challenge, scope, expectations, and budget (or budget range) as clearly as governance allows. If NDA is signed there should be no limit of sharing the right amount of info for the bidders to craft a meaningful response.
- **Design realistic timelines**
  While marketers may be under time pressure, unrealistic timelines reduce the quality of submissions and participation. Where constraints exist, transparency allows agencies to assess feasibility and participate responsibly.
- **Commit decisionmakers to the process**
  Ensure consistency of attendance and engagement from the evaluation team across briefings, chemistry sessions and final presentations. Shifting stakeholders mid-process undermines fairness and confidence.
- **Respect agreed working boundaries**
  Wherever possible, align expectations around working hours, holidays and turnaround times, recognising that pitch work sits alongside ongoing client commitments.
- **Communicate openly and professionally**
  Keep agencies informed of changes, delays or evolving requirements, and provide timely responses to reasonable questions. Suggest having single round of Q&A (usually before or after chemistry sessions).
- **Provide constructive feedback**
  Honest, objective feedback at key stages supports learning, improves future participation, and reinforces trust , even where agencies are unsuccessful.

These responsibilities are not intended to eliminate rigour or scrutiny. They are designed to help marketers run selection processes that stand up to internal governance, attract strong agency participation, and lead to better long-term partnerships.

2.3 Agency Responsibilities

Responsibilities of Agencies in Agency Selection

Agencies also have a responsibility to participate in selection processes in a way that supports professionalism, sustainability, and long-term value creation, both for their businesses and for the industry as a whole.

We recognise that agencies operate under their own pressures, including revenue uncertainty, resource constraints, and intense competition. However, sustainable change depends on agencies exercising informed choice, not automatic participation.

Agencies are encouraged to:

- **Assess fit and feasibility upfront**
  Confirm that they have the capability, capacity, and commercial viability to participate before committing to a pitch.
- **Be selective and transparent**
  Declining to participate in a process that materially falls short of the Charter's benchmark standards is a legitimate and responsible business decision.
- **Engage constructively in issue resolution**
  Where an incumbent relationship exists, agencies should make reasonable efforts to address challenges collaboratively before a pitch is initiated.
- **Participate in good faith**
  Agencies should engage with the intent to win and deliver the business, not simply to gain exposure, intelligence, or credentials.
- **Manage pitch workloads responsibly**
  Agencies should plan and resource pitch teams in a way that avoids unsustainable pressure and protects core client delivery.
- **Respect confidentiality and integrity**
  Maintain confidentiality throughout the process and respect the marketer's decision once a fair outcome has been reached.
- **Recognise marketer constraints**
  Agencies should acknowledge that procurement, governance and global alignment requirements may necessitate reviews, even where relationships are performing well.
- **Support collective consistency**
  Sustainable improvement depends on agencies aligning around shared standards and avoiding practices that undermine long-term industry sustainability.

By exercising greater selectivity and consistency, agencies strengthen their own businesses and help reinforce better norms across the market.

Section 3 : Recommended Agency Selection Process

Practical Guidance

This section provides practical guidance on how the benchmark standards may be applied in practice. It is advisory, not prescriptive, and recognises that organisational, procurement and governance contexts will vary.

The benchmark standards set out in **Section 1** define *what responsible agency selection looks like*, while **Section 2** clarifies the shared responsibilities and behaviours that sustain it in practice. The process that follows translates those principles into a practical, staged approach that can be applied across different organisational, procurement and governance contexts.

3.1 Overview of the Three-Stage Process

Responsible agency selection is not a single event; it is a structured journey that unfolds over time. The process below outlines a **three-stage approach** designed to help marketers and agencies make better decisions, reduce unnecessary friction, and set partnerships up for long-term success.

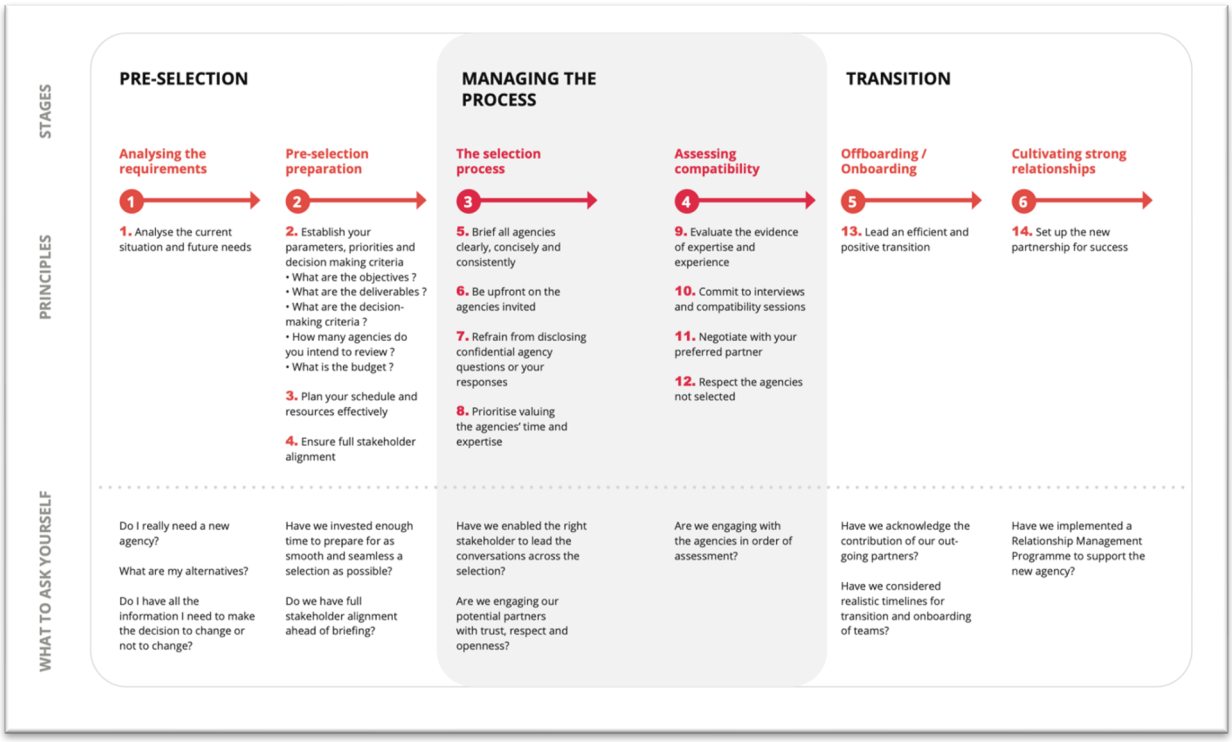
Rather than treating a pitch as a standalone competitive exercise, this framework emphasises **clarity before competition**, **discipline during selection**, and **care during transition**. Each stage builds on the previous one, ensuring that decisions are informed, defensible, and aligned with both commercial realities and human considerations.

The model moves from:

- **Pre-selection**, establishing whether a pitch is necessary and defining the real requirements,
- **Managing the process**, running a focused, fair and transparent selection,
- **Transition**, onboarding and offboarding responsibly to protect continuity and relationships.

At each stage, the framework highlights not only *what to do*, but also *what to ask yourself*. These reflective questions are intended to help organisations pause, test assumptions, and avoid defaulting to habit-driven or unnecessarily burdensome processes.

This approach is **practical guidance**, not a rigid formula. It is designed to be adapted to different organisational, procurement and governance contexts, while remaining anchored to the Charter's benchmark standards for responsible agency selection.



Source: VoxComm: https://voxcomm.org/2025/06/19/wfa-voxcomm-agency-selection-guiding-principles/

You can download the process spreadsheet here

3.2 Stage 1: Pre-Selection

Be Positive a Pitch is Necessary
Not every appointment of an agency should require a pitch. If there is obvious best-fit agency partner, and the business' governance allows, the agency can simply be appointed.

If it is decided a new agency is needed, due to a change in objectives, commercial factors, or governance requirements , and there is an incumbent agency , you should first take reasonable steps to see if your incumbent agency can deliver. Be clear about what you want the pitch to deliver. If those outcomes cannot be achieved with the incumbent, only then proceed to a formal pitch.

If there are challenges – professional, procedural or psychological – with your current agency, our recommendation is to conduct a deep relationship assessment to resolve the issues. Changing your agency requires significant resources and effort, and there should be a stronger emphasis on repairing and optimising existing agency relationships before considering a pitch, with formal reviews and considering third-party consultancy involvement. Global research shows that 9 in 10 WFA members focus on issue resolution before pitching as a solution.

See steps to reviewing your current agency relation in the FAQ Section.

Determine the Type of Pitch
If a pitch is needed, decide whether the requirement is for a full-time agency of record, a stand-alone project, or a specialist service such as PR, media, or influencer marketing. A pitch process may involve reviewing agency credentials, evaluating strategic thinking based on a brief, assessing creative ideas, exploring channel planning, and examining costing or resource planning. In most cases, a decision can be made without progressing beyond the strategic and creative stages, with detailed strategies, channel plans, and costings negotiated after the appointment.

Clear Articulation of Needs vs Wants
Define exactly what you need from an agency and what would be desirable but not essential. This clarity will shape the evaluation questions in your Request for Information (RFI) and help identify agencies that are genuinely able to deliver. Being specific will also reduce wasted effort on both sides and create a more focused and efficient process.

3.3 Stage 2: Managing the Process

Communication and Behaviours When Starting the Pitch Process
As we've discussed above, before a pitch begins, marketers should have open

discussions with the incumbent agency to explore whether the relationship can be continued. Should the pitch go ahead, the incumbent must be notified. Unless the relationship is beyond repair or the agency is unable to manage the business for other reasons, the incumbent should be invited to pitch – however - they must have an equal chance of winning.

Fair Treatment and Commercial Viability for Incumbent Agencies

While incumbents must have an equal chance of retaining the business, the associations understand that they may face commercial pressures that make declining a demanding re-pitch unrealistic.

The following practices are widely regarded as effective in these situations:s:

- **Reasonable Pitch Conditions:** Re-pitches should offer incumbents the same fairness as new agencies - including adequate time, a proportionate pitch fee where creative or strategic work is required, and a manageable shortlist.
- **Transition Support:** Where a significant account changes hands, marketers are encouraged to allow a longer hand-over period, ideally up to six months, to support continuity and responsible resourcing for both agencies.
- **Referral and Advisory Support:** If an incumbent believes the process is inconsistent with this Charter, they may confidentially refer the matter to their relevant industry association/body for Independent Mediation and advisory input.
- **Confidential Mediation:** With the agency's consent, the industry association may discreetly approach the marketer to encourage adjustments in line with the spirit of this Charter.

A pitch evaluation committee should be identified, comprising all relevant internal stakeholders , including finance, procurement, legal, the CMO, ESG leads, and, where appropriate, the CEO ,with clear communication channels established. The pitch lead must ensure these stakeholders are available to attend all meetings and review sessions and maintain consistency of attendance to avoid delays or misalignment. A project plan should be prepared that reflects these commitments, and procurement and marketing must be aligned before the pitch is announced.

Issue a Mutual NDA

All participating agencies should sign a mutual non-disclosure agreement that is fair, balanced, and effective in protecting confidential information from the start to the conclusion of the pitch.

RFI (Request for Information) – Long List

At this stage, marketers can request key background information from agencies such as size, client base to determine conflict and experience, team structure, and case studies. While this stage may be open to multiple agencies, it should be limited to no more than ten. The RFI should be short, focused, and designed to give a clear picture of

how each agency aligns with the marketer's needs and wants, as set out in your evaluation criteria. Only those with a realistic chance of progressing should be invited to participate.

Agencies should be given enough time to respond meaningfully.

Our recommended guideline is ten days, but if the RFI requires extensive Scope of Work and financial information (not encouraged at this stage), the agency should be given three weeks.

To support fair decision-making, agencies should also be given a clear indication of the budget parameters at the RFI stage. This enables them to assess the opportunity realistically and decide whether to participate.

Chemistry Meetings

After reviewing RFI submissions, marketers may hold chemistry meetings (an hour to two hours) with a reduced list of agencies.

Our recommendation is no more than 5 agencies should be invited for chemistry meetings.

These sessions should be run objectively, allowing agencies to introduce themselves, share their understanding of the brand and its challenges, and engage in open discussion. These meetings are intended to assess compatibility and working style, not to deliver a full pitch. A strong recommendation is there should be a no-slide policy. This meeting is like a date, where both parties are getting to know each other. The marketer is encouraged to share a topline brief with the agency of their current state of business and core marketing challenge before the meeting, to allow the agency to prepare for a valuable discussion. The marketing team must ensure consistency of decision makers/stakeholders in these meetings.

RFP (Request for Proposal) – Short List

Following chemistry sessions, the shortlist should ideally be no more than three agencies, and never more than five. The incumbent agency is not automatically included in this round if they did not get through the previous round. Unsuccessful agencies must be courteously informed, and feedback should be given to help them understand why they didn't proceed.

The RFP stage is for detailed proposals and costings. It is recommended that an agency fee proposal form part of this stage. This prevents an agency from winning the pitch and then being unable to agree on fee negotiations further down the line. This is obviously not a good outcome for the marketer or agency and can be avoided if the fee component is included in this part of the pitch process.

Marketers should provide a comprehensive, detailed and unambiguous brief (including budget), clear and transparent evaluation criteria, a draft contract, and the process for addressing questions arising from the brief.

It is not recommended to do a group briefing of all the agencies – it saves time, but you will not get the quality of questions you would get in one-on-one briefing sessions. During the process, agencies will ask questions. It is not necessary to share the questions and the answers with all participating agencies – this is what makes some agencies better than others! Again, consistency in who attends meetings is critical.

A reminder that the Intellectual Property of any strategic or creative thinking presented in this section of the process belongs to the agency, unless explicitly contracted otherwise.

This stage should be conducted with transparency, openness, and collaboration to achieve the best possible outcome.

The Final Decision

After the evaluation process, the decision is made, and all agencies should be informed of the outcome. The marketer should look to appoint an agency within a maximum of 4 weeks of the last pitch presentation. Feedback should be provided to unsuccessful participants. and contracting requirements should be clearly understood before awarding the business.

3.4 Stage 3: Transition and Onboarding

Advise the Losing Agencies and Agree the Notice Period

Unsuccessful agencies should be informed directly and respectfully before any public announcement. For incumbent agencies, a fair notice period should be provided, six months is recommended for large accounts , to give bridging time for team restructuring and to allow the new agency to build the necessary resources.

Agency Onboarding and Offboarding/Hand-over

Where relevant, a structured handover should ensure continuity of work and protect brand momentum. If requirements go beyond the incumbent agency's scope, these should be quoted separately.

- Plan sufficient time and resources for induction and transition, with a buffer for a well-paced process. If a consultant led the pitch, consider involving them in the handover.
- Lead the transition: Marketers should drive the process to set the tone for future engagement.
- Clarify early scope: Define priorities for the first months.
- Allow realistic timelines: Recruitment, notice periods, and onboarding (3–6 months to embed talent) all take time.
- Account for remote transitions: With less travel, plan how milestones will be managed virtually.

3.5 Feedback Principles

All agencies invest significant time, resources, and creative energy into pitches. Offering detailed, constructive feedback demonstrates respect for their effort and helps them improve for future opportunities.

Guidelines for Feedback through the Process

After the RFI phase:

- What were the key criteria were that determined which agencies progressed and which did not?
- What were the main areas in which the agency fell short, or were there any areas in which the agency's response was not clear or distinct enough?
- Was there anything the agency could have done differently, or was the agency's response just not competitive?

After the RFP phase:

- What were the key obstacles in the agency's submission/meeting that prevented them from moving forward?
- What were the key positives in the agency's submission/meeting?
- Were there things the agency could have done differently which might have changed the outcome?

After the final pitch:

- What were the key obstacles that prevented the agency from winning the business?
- What were the aspects of the agency's work that stood out as positives?
- What might the agency have done differently?
- Were team chemistry, agency-marketer team alignment, shared values and/or other talent issues of concern?

Negotiations: Conclude the Contractual Agreement

After verbal appointment, the contractual agreement with the winning agency should be finalised within four weeks of appointment. All commercial terms must be settled before awarding the business to avoid delays that can undermine trust and damage the relationship.

The marketing team and agency should work with procurement and any consultants involved in the process to agree on overall terms, including budget, basic remuneration, Scope of Work, resourcing and IP ownership.

> *"It cannot be in clients' long-term interest, when reputation is so critical to ensuring you can work with the best possible talent, to unfairly extend payment terms"* – Stephan Loerke, CEO, WFA **(Global agency remuneration trends 2022)**[10]

Source: https://wfanet.org/knowledge/item/2022/12/12/Global-Agency-Remuneration-Trends-2022-update

For marketers: when considering payment terms in your negotiations with potential partners, it's important to remember existing industry best practice and the impact on your agency and its partners and suppliers. On average, 'standard' payment terms tend to be between 30 to 60 days, but this shouldn't be a one-size-fits-all approach. In fact, negotiating payment terms may need to be a part of your broader discussion when finalising commercial agreements with your selected partner, and not a competitive advantage. Do bear in mind the impact that longer payment terms can have. When businesses force agencies to accept extended payment terms, this means that in some cases, work may have already been completed by the agency before any money lands in their account. This can place significant strain on agency cash flow and delivery.

Where pass-through costs are common: production, media buys etc, the agency should not be expected to act as the client's bank.

Cash neutrality is important: pass-through costs should be estimated, aligned, and paid as close to up-front - or in advance - as possible, to make sure all levels of the supply chain are paid, not just the lead agency.

Make the Announcement

Should it be agreed there will be a public announcement, the marketer and the appointed agency should coordinate on the timing and messaging of the announcement to ensure consistency and alignment.

Run a Rules of Engagement Session

Early in the relationship, a rules-of-engagement session should be held to define shared expectations, agree on success measures, and establish how challenges will be addressed. Building trust, transparency, and open communication from the outset will lay the foundation for a successful long-term partnership.

Appendices

Appendix A: **Frequently Asked Questions**

Appendix B: **Procurement-Specific Objections & Responses (Addendum)**

Appendix C: **Glossary**

Appendix D **Resources, Templates (RFI, RFP, NDA), Global References**

Frequently Asked Questions

1. Will changing my agency solve my current issues?
Not necessarily. Simply switching agencies won't address underlying challenges if the real issues haven't been identified and understood. A successful solution requires clarity on both business needs and the root causes of underperformance. Remember, every partnership has two sides, and without proper analysis, it's difficult to pinpoint the real problem.

Steps to review your current agency

Before embarking on the selection process, it is essential to thoroughly assess your existing partnerships and consider your future requirements. To conduct a comprehensive internal review or informal survey, ask yourself and your teams the following key questions about your client-agency relationship:

- How is the current working relationship? Where do any issues originate (both parties need to be assessed and held accountable) and have steps already been taken to resolve any issues?
- Does the work currently meet your requirements and deliver against agreed KPIs?
- Do you already have an agency on your roster that can provide this service?
- Are you ready to change? Both internally (structure, ways or working, skills etc.) as well as externally (working with someone new?)

Consider implementing a relationship management programme:

If you don't have a structured process in place to conduct regular health checks and reviews of the current agency-client relationship and output, consider implementing

a relationship management programme. This is best practice and provides a platform for discussing the value exchange between the two parties – not just at a single point in time, but on an ongoing basis, focusing on continuous improvement. It is a process by which all critical aspects of the client-agency relationship are identified, periodically reviewed, and openly discussed to clarify expectations, raise issues (on both sides), define success, and optimise the working relationship.

Relationship re-sets and evaluation via a third-party consultant:

If the partnership between an agency and a client is analogous to marriage, inviting an external consultant to evaluate the relationship is the equivalent of going for marriage counselling. As with a marriage, this option can be tremendously productive and fruitful in situations where communication channels might have broken down or when a neutral, third-party perspective is required to deliver objective facts and advice. Working with an external consultant can offer numerous benefits, as they bring expertise and support to the existing relationship. However, it is crucial to be mindful of certain considerations. For example, beware certain external support (e.g. consultancies) who offer multiple services who may stand to gain financially from advocating a pitch. It is important to exercise caution when relying solely on one source regarding whether to proceed with a pitch.

Don't hesitate to have an open and honest conversation with an agency:

If there are issues with the relationship or the work, an agency would much rather engage in a tough discussion with a client than have an account put into review. As stated by one agency CEO, "None of us are that fragile."

Consider asking the agency for a fresh look at the client's business, either with the existing agency team or with some agency personnel who have not previously worked with the client. If there is an issue with the people working on your business, ask your current agency to look within for a fresh thinking. Another option to consider is to hold a collaborative workshop that can help client and agency teams re-energise and think beyond the day-to-day work. Additional options could include an in-depth look at the

capabilities of roster agencies and running a chemistry or working session, a "pitch-in-a day" or a "no-pitch-pitch", involving the incumbent agency or existing rostered agencies tackling a pitch brief as if it was a brand-new opportunity.

Allow enough time for real change to occur and for the agency to take on board any feedback, implement any changes, and allow a timeline to see results.

Changing agency partner can often be more time and resource-consuming than resolving immediate issues with your current partnership. With the average pitch lasting up to 6 months, the client and participating agencies will be committing to undertake additional work on top of their daily responsibilities. This in turn has led to many agencies becoming more selective as to who they want to work with, and clarity on why a client is running a pitch is more of a necessity than ever.

If you cannot find a resolution with your current agency partner, consider the learnings from your recent investigation into the decision-making criteria for your upcoming search. Clearly define the specific elements and deliverables that are crucial for your team to make efficient and effective decisions, while also being considerate of your current agency partner. If you believe there is a genuine possibility for your current agency partner to succeed in an agency review, you may benefit from including them in the process.

Despite the time and resource burn faced by pitching, agencies, in most instances, undertake this additional workload without receiving compensation unless they are ultimately selected for the project and, even then, it often takes many months for the agency to start earning a profit. It is important to be aware of and take into account local regulations and best practice around pitching, including pitch compensation.

Both parties should refer to the Master Services Agreement (MSA) which should address concerns about ensuring a seamless continuation of work during the pitch process as well as outlining the necessary provisions and protocols for a smooth transition to a

new agency, safeguarding the continuity of operations.

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2. Why do marketers decide to run a pitch?
Common reasons include:

- **Mandatory reviews:** Some organisations require supplier reviews every few years, often driven by procurement rules. While useful for commodities, this approach is less effective for marketing partnerships, which typically take a year or more to establish and deliver value. Strong, long-term agency relationships are proven to deliver the best results.

- **Skills or fresh thinking:** Sometimes businesses feel their agency lacks certain expertise or new ideas. Before moving to a pitch, consider whether your current partner could recruit or bring in specialist support, or whether fresh perspectives within the same agency could be leveraged.
- **Reviewing costs:** Benchmarking rates is common, but marketing services differ from standard procurement. Focusing only on hourly rates risks commoditising creative services. Instead, compare total project fees or annual budgets to ensure value without sacrificing quality.
- **Budget or scope changes:** Instead of a pitch, it may be better to realign expectations with your current agency and explore what can be achieved within new budget parameters.
- **Evolving ESG priorities:** Many agencies have ESG expertise beyond the day-to-day team. Engaging these specialists may be more effective than a full review.

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3. Does inviting more agencies improve the outcome?
Not always. A shorter, more focused list of qualified agencies usually leads to a more effective process. Inviting too many participants can waste time, drive up costs for everyone, and dilute engagement. Aim for a balance between exploring options and respecting agencies' time and investment.

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4. When should senior leadership be involved?
Ideally, senior leaders should be kept informed throughout, especially at key milestones. Increasingly, C-suite executives participate in pitch briefings to ensure alignment on ambition and goals.

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5. How do I maintain confidentiality while sharing key details like budgets?
Confidentiality is best ensured by asking agencies to sign a mutual NDA at the outset. This allows both sides to share critical information openly and constructively.

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6. Can technology improve the agency selection process?
Yes, when applied thoughtfully. Online tools can simplify initial steps such as RFIs, but evaluating expertise, chemistry, and compatibility usually benefits from in-person or video meetings.

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7. Is it possible to run a very fast pitch process?
While some companies attempt "one-day pitches," most effective processes require time. In practice, reviews often take 2–6 months. Unrealistic timelines can strain all parties and may discourage the best agencies from participating.

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8. When should I inform my current agency about a review?
If you've made every effort to address issues through relationship management, a review should not come as a surprise. Out of respect, inform your incumbent before other agencies, giving them the option to participate or decline. If the relationship is already ending, share timelines to ensure a smooth transition.

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9. Should I share all information equally with every agency?
All agencies should receive the same brief to ensure fairness. However, proprietary follow-up questions from one agency don't need to be shared with others, as they may reflect unique strategic thinking.

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10. Is conflict a bad thing in agency relationships?
Not at all. Healthy creative tension often drives better work. You want an agency that challenges your thinking, defends strong ideas, and pushes for the best possible outcomes.

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11. How do extended payment terms affect agencies?
Extended terms can strain agencies' ability to deliver their best work, as it impacts cash flow, investment in talent, and supplier payments. This can weaken the agency and ultimately harm the marketer relationship.

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12. Should I expect a new agency to start delivering immediately?
Agencies typically need time to build the right team, align with requirements (including ESG or DEI commitments), and invest in the right talent. Setting realistic timelines is essential for success.

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13. Is January 1 a good time to start a new agency relationship?
Often not. Year-end holidays make transitions difficult for both marketer and agency teams. The same applies to other major holiday or festival periods worldwide. Consider cultural and timing factors carefully.

Procurement-Specific Objections & Responses (Addendum)

This addendum addresses questions and concerns commonly raised by procurement, finance, legal, and risk teams when reviewing guidance on agency selection and supplier reviews.

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1. "Does this conflict with our procurement policies or supplier review cycles?"

Response:
No. The Charter is designed to **operate within existing procurement frameworks**, not replace them.
It recognises that many organisations have:

- mandatory supplier reviews,
- rotation policies,
- audit and risk requirements,
- global alignment obligations.

The guidance focuses on *how* agency selection processes are designed and managed once a review is required, helping teams meet governance obligations more effectively and with less wasted effort.

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2. "Are we being asked to reduce competition or limit supplier access?"

Response:
No. The Charter does not restrict competition.
It encourages **disciplined shortlisting**, not fewer suppliers overall. This aligns with procurement best practice, which favours:

- pre-qualification,
- relevance-based selection,
- and proportional process design.

Well-structured shortlists improve evaluation quality and reduce process cost without reducing competitive tension.

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3. "Does budget transparency undermine our negotiating position?"

Response:
Transparent budget ranges are intended to improve **commercial realism**, not weaken negotiation.
When agencies understand the commercial parameters:

- proposals are more relevant,
- pricing is more accurate,
- downstream renegotiation and re-scoping are reduced.

This reduces total process cost and risk, and aligns with procurement's objective of predictable, defensible outcomes.

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4. "Are pitch fees inconsistent with procurement principles?"

Response:
Pitch fees are positioned as **context-specific**, not mandatory.
They are recommended only where significant strategic or creative work is required, and are framed as:

- cost offsets,
- signals of intent,
- and a way to improve response quality.

From a procurement perspective, pitch fees can reduce hidden costs, improve participation quality, and prevent resource wastage across multiple suppliers.

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5. "Does this create legal or competition-law exposure?"

Response:
No. The Charter is explicitly:

- non-mandatory,
- non-enforceable,
- and non-prescriptive on commercial terms.

It does not address pricing, supplier selection outcomes, or contractual conditions.
It functions as **normative guidance**, similar to governance or ethics frameworks commonly used in supplier management.

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6. "Will this slow down procurement-led processes?"

Response:
The intention is the opposite.
By encouraging:

- clearer briefs,
- better upfront alignment,

- and realistic timelines,

the Charter aims to reduce:

- re-briefing,
- supplier drop-out,
- extended negotiations,
- and failed transitions.

This supports procurement's focus on efficiency, predictability, and risk reduction.

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7. "Does this prioritise wellbeing over cost and performance?"

Response:
No. References to people and workload are **commercially grounded**, not ideological. Burnout, disengagement, and supplier fatigue directly impact:

- response quality,
- evaluation accuracy,
- delivery performance post-appointment.

The Charter frames these issues as **performance and risk considerations**, not moral obligations.

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8. "How does this help us defend decisions internally or externally?"

Response:
Processes aligned to the Charter are:

- easier to justify in audits,
- more defensible in governance reviews,
- less vulnerable to challenge from unsuccessful suppliers.

Clear criteria, consistent decisionmakers, and documented rationale align with procurement's accountability requirements.

Bottom Line for Procurement

The Charter:

- supports procurement discipline,
- improves process efficiency,

- reduces supplier risk and fatigue,
- strengthens audit defensibility,
- and does **not** compromise competitive integrity.

It is a **practical framework for better process design**, not a constraint on commercial decision-making.

Glossary

- **EACA:** European Association for Communication Agencies
- **IPA:** Institute Practitioners in Advertising, UK
- **ISBA:** ISBA brings together a powerful network of marketers with common interests and gives a single voice to advocacy for the improvement of the industry.
- **MASA:** Marketing Association South Africa
- **RFI:** Request for Information
- **RFP:** Request for Proposal
- **VoxComm:** Established in 2020, VoxComm is the new global voice for agencies, championing the value agencies bring to their marketers. With more than 35 national trade associations from around the globe, VoxComm stands for the power of commercial creativity in all its forms – across strategy, ideas, content and media – as a proven lever for growthFor more information, visit www.voxcomm.org.

Resources

1. **Finding an agency: ISBA and IPA, UK Best Practice:** https://ipa.co.uk/media/7916/finding-an-agency-final.pdf
2. **WFA and VoxComm Agency Search Guidelines:** https://voxcomm.org/2025/06/19/wfa-voxcomm-agency-selection-guiding-principles/
3. **The cost of pitching:**
    - **EACA Cost of Pitching: https://eaca.eu/news/eaca-cost-of-pitching-press-release/**
    - **Scopen SA's New Business Report:** https://www.bizcommunity.com/article/exclusive-south-african-creative-agencies-compete-for-new-business-in-47-pitches-a-year-814123a
    - **ANA Cost of Pitching: https://www.ana.net/miccontent/show/id/rr-2023-07-ana-4as-cost-of-the-pitch**

4. **RFI Template: Word and PDF**
5. **RFP Template: Word and PDF**
6. NDA Mutual Confidentiality Template
7. **Positive Pitch Pledge:** https://www.pitchpositivepledge.co.uk/
8. **Global Agency Remuneration Trends (WFA members only):** https://wfanet.org/knowledge/item/2022/12/12/Global-Agency-Remuneration-Trends-2022-update
9. 4A's Relationship Management Best Practices Guidance: https://www.aaaa.org/resource/4as-guidance-4as-relationship-management-best-practicesguidance/
10. Commercial Communication Council's Pitch Principles : https://commscouncil.nz/resources/pitch-principles
11. Defining World Class Marketing Procuement (WFA): https://wfanet.org/knowledge/item/2021/02/03/Defining-world-class-standards-for-marketing-procurement
12. **Remote Pitching:** https://www.youtube.com/watch?v=a9ry4Z3A77s
13. **Qualification Based Pitching (QBS): https://theica.ca/qbs**
14. **Process Checklist: https://associatingofcommunication-my.sharepoint.com/:x:/g/personal/gillian_acasa_co_za/IQDSTMbvjf2HQal9xX7UHX0KAR-qGjHqRmCnqAJaFdvDcNs?e=2rGc5J**
15. **Pitch Portal: Link**