

# Post-Review Feedback



A Guidance Directive from the 4A's New Business Committee

## 4A's Guidance: Post-Review Feedback

Agency new business efforts represent a vital research and development investment for the marketing services industry. In any R&D environment it is important to explore new innovations, test, measure, learn and then recalibrate the product or service offering based on in-market customer assessment. Surprisingly many agencies do not have formal protocols for consistently obtaining learning feedback from their new business-agency review activities.

### 1. Objective

Members of the 4A's new business committee want to provide guidance to the agency community and inculcate industry best practice relating to the benefits and key learning that can be derived from conducting routine and formal agency assessments following participation in all major agency reviews.

**The 4A's new business committee post-review feedback guidance includes three recommendations:**

- 1) Agencies should conduct a self assessment immediately following the final review meeting.**
- 2) Agency search agreements between the advertiser and agencies participating in the review should document the client's commitment to provide the agency with frank, timely and relevant post-review feedback.**
- 3) All agencies should use a standardized post-review feedback questionnaire to help guide the efficient collection of key agency search performance information.**

Agency new business leaders have developed an industry standard 4A's Agency Review Feedback Questionnaire tool that the new business committee recommends that all agencies use in order to provide better understanding on where their agency performed well and where they could have improved effectiveness during the agency selection process.

### 2. Background

Agencies invest precious resources in the pursuit of new business. Recent years' trends indicate that many marketers are conducting reviews more frequently and, particularly among large budget advertisers, the agency search process often includes some type of speculative work assignment that elevates an agency's cost to participate in a review. Resultantly, the level of agency investment in agency review activity is significant.

Many agencies do not have formal, structured agency review feedback mechanisms in place. Given the agency community's investment in new business-agency review activity, it makes

sense for agencies to formally gather information pertaining to the effectiveness of the agency's new business-agency review efforts.

The marketing services industry should not rely on haphazard, sporadic and anecdotal agency review client feedback. Agencies should remind clients that it is in the client's best interest to be brutally honest and transparent when providing feedback. Why? Because without candid feedback, agencies will continue to repeat the same mistakes which will have the effect of driving up the cost and reducing the effectiveness of the client's reviews. Agencies should make sure that the client understands that the client won't hurt the agency's feelings and the client should "please open up and just lay it on the line."

### **3. Best Practice Guidance: Post-Review Feedback**

4A's recommends that agencies consistently utilize structured mechanisms for assessing agency performance immediately following the agency review process.

*4A's recommends that agencies consistently and formally assess the agency's performance immediately following the agency's participation in any significant agency review.*

The 4A's post-review feedback guidance recommendations include:

1) Agencies should conduct a self-assessment immediately following the final review meeting.

Ideally the agency's self-assessment should be completed prior to finding out if the agency prevailed in the review. Why then? Because, if you wait until after a selection has been made, that outcome will polarize all perspectives on the agency's performance and diminish potential learning.

2) The agency search agreement between the advertiser and agencies participating in the review should document the client's commitment to provide the agency with frank, timely and relevant post-review feedback.

The search agreement or NDA between the marketer and the agency should cover: (1) mutual confidentiality (2) agency ownership of agency developed ideas and work product (3) expense reimbursement terms and (4) agreement on post-review feedback procedures and other material terms and conditions.

Given the significant investment that an agency will make during the agency review process, it is appropriate for the agency to ask the marketer for a contractual commitment to provide frank feedback as a condition for the agency agreeing to participate in the review.

3) The 4A's new business committee recommends that every agency "finalist" participant obtain feedback from client decision makers immediately following client determination of the review decision. The 4A's recommends that all agencies consider using a standardized post-review feedback questionnaire to help guide the efficient collection of key agency search performance information.

#### **4. Agency Review Feedback Questionnaire**

In order to help facilitate timely, relevant learning pertaining to an agency's review performance, the 4A's new business committee has developed a 4A's Agency Review Feedback Questionnaire that all finalist agencies should ask the marketer to complete immediately following the conclusion of the review.

The 4A's Agency Review Feedback Questionnaire that is attached to this guidance directive is structured to provide agencies with information on where they performed well and where they could have improved effectiveness during the agency selection process.

#### **5. 4A's Guidance: Post-Review Feedback Summary**

The agency community has the opportunity to improve the accountability of its new business R&D investment. The ROI discipline that is applicable to marketing investments can and should be applied to agency review investments.

***4A's recommends that agencies consistently and formally assess the agency's performance immediately following the agency's participation in any significant agency review.***

The increasing level of agency review activity and the significant resource investment in agency business development warrant a consistent and formal industry approach to assessing agency review performance and capturing key learning that can be used to improve agency effectiveness and efficiency over time.



## **4A's Agency Review Feedback Questionnaire Instructions**

The 4A's Agency Review Feedback Questionnaire was developed in order to provide better understanding for the agency on where the agency performed well and where the agency could have improved effectiveness during the agency selection process.

The questionnaire has three sections:

Section One.....Review Information

Section Two..... Survey participant information

Section Three.....Feedback questions

In section three of the questionnaire (i.e., feedback questions) the marketer that conducted the review is asked to rate performance on a score/scale from very unsatisfactory to very satisfactory and provide feedback comments.

The feedback questionnaire should be forwarded to the marketer immediately following the agency review decision. The questionnaire should request that the client decision makers provide their feedback within ten days.

### **Section One: Review Information**

This section of the questionnaire documents basic review information notably: the names of the client and agency, the review time period and the description of the marketing services that were being reviewed.

Note: It is recommended that the agency populate the information in this section prior to sending the questionnaire to the marketer.

### **Section Two: Marketer Questionnaire Participant Information**

This section of the questionnaire documents the specific individual in the marketer organization that is being asked to provide review feedback. Each individual at the marketer organization that was involved in the agency selection decision should be asked to complete the feedback questionnaire.

Note: It is recommended that the agency populate the information in this section prior to sending the questionnaire to the marketer only if the agency knows each and every client decision maker. If the agency does not definitely know each marketer decision maker then this section should be sent to the marketer with the request that the questionnaire be completed by all of the client executives that were decision makers in the agency selection determination.

### **Section Three: Feedback Questions**

This section of the questionnaire asks the marketer decision maker 13 or 14 questions about their perceptions of the agency's performance during the review process. Question 3.13 should only be included in the questionnaire when the agency did not prevail in the review.

Each of the questions requires the decision maker to provide frank and specific feedback comments. The initial questions (questions 3.1 thru 3.11) also require the decision maker to score the agency's performance on a scale from one (very unsatisfactory) to five (very satisfactory).

Note: Remember to thank the client decision maker for taking the time to provide the agency with helpful feedback. Also, instruct the client respondent where or how to submit their questionnaire information.

### **Questionnaire Implementation**

While the attached standard 4A's Agency Review Feedback Questionnaire is provided in an off-line template form, the 4A's recommends that members implement the questionnaire online using the online tool of their choice.

Having the questionnaire online will aid in its distribution to the marketer. The agency can send the link to the questionnaire to all marketer personnel who participated in the review, or to one person at the marketer who can then forward it to others.

When your agency programs the online questionnaire you may want to label the input form "4A's Standard Agency Review Feedback Questionnaire." This should aid in marketer acceptance.

Finally, please note that for the questions in Section Three, depending on the online survey tool that you use, in order to get feedback, you may have to separate each score and feedback information request into two questions.



## 4A's Agency Review Feedback Questionnaire

The 4A's Agency Review Feedback Questionnaire was developed in order to provide better understanding for the agency on where the agency performed well and where the agency could have improved effectiveness during the agency selection process.

The questionnaire has three sections:

Section One.....Review Information

Section Two..... Questionnaire Respondent Information

Section Three.....Feedback Questions

### Section One: Review Information

This section of the questionnaire documents basic review information

1.1 Marketer Company Name: \_\_\_\_\_

1.2 Agency Company Name: \_\_\_\_\_

1.3 Review Time Period, From: \_\_\_\_\_ to \_\_\_\_\_

1.4 Description of Services Being Reviewed: \_\_\_\_\_



## **Section Two: Marketer Questionnaire Respondent Information**

This section of the questionnaire identifies the individual that is providing review feedback

### **2.1 Name of Marketer Executive Involved in the Agency Selection Decision**

**Completing this Questionnaire:** \_\_\_\_\_

### **2.2 Title of Marketer Executive Involved in the Agency Selection Decision**

**Completing this Questionnaire:** \_\_\_\_\_



### Section Three: Feedback Questions

This section of the questionnaire asks questions about your perceptions of the agency's performance during the review process. Each of the questions requests frank and specific feedback comments. The initial questions (questions 3.1 thru 3.11) also ask you to score the agency's performance on a scale from one (very unsatisfactory) to five (very satisfactory)—for each of these questions please select the rating score that most closely matches your assessment.

**3.1 Throughout the review process, beginning to end, the agency met or exceeded all of your requirements and expectations.**

|                |                |                |          |              |              |
|----------------|----------------|----------------|----------|--------------|--------------|
| <b>Rating:</b> | <b>1</b>       | <b>2</b>       | <b>3</b> | <b>4</b>     | <b>5</b>     |
|                | Very           |                |          |              | Very         |
|                | Unsatisfactory | Unsatisfactory | Neutral  | Satisfactory | Satisfactory |

**Score:**

**Feedback:**

Please elaborate on your rating score by providing feedback in the space below

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**3.2 The agency demonstrated a clear understanding of the client's business.**

|                |                |                |          |              |              |
|----------------|----------------|----------------|----------|--------------|--------------|
| <b>Rating:</b> | <b>1</b>       | <b>2</b>       | <b>3</b> | <b>4</b>     | <b>5</b>     |
|                | Very           |                |          |              | Very         |
|                | Unsatisfactory | Unsatisfactory | Neutral  | Satisfactory | Satisfactory |

**Score:**

**Feedback:**

Please elaborate on your rating score by providing feedback in the space below

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**3.3 The agency delivered a significant insight, business solution, strategy or idea.**

|                |                |                |          |              |              |
|----------------|----------------|----------------|----------|--------------|--------------|
| <b>Rating:</b> | <b>1</b>       | <b>2</b>       | <b>3</b> | <b>4</b>     | <b>5</b>     |
|                | Very           |                |          |              | Very         |
|                | Unsatisfactory | Unsatisfactory | Neutral  | Satisfactory | Satisfactory |

**Score:**

**Feedback:**

Please elaborate on your rating score by providing feedback in the space below

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**3.4 The agency demonstrated the ability to support the solution with relevant messaging execution.**

|                |                |                |          |              |              |
|----------------|----------------|----------------|----------|--------------|--------------|
| <b>Rating:</b> | <b>1</b>       | <b>2</b>       | <b>3</b> | <b>4</b>     | <b>5</b>     |
|                | Very           |                |          |              | Very         |
|                | Unsatisfactory | Unsatisfactory | Neutral  | Satisfactory | Satisfactory |

**Score:**

**Feedback:**

Please elaborate on your rating score by providing feedback in the space below

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**3.5 The agency solution was well integrated.**

|                |                |                |          |              |              |
|----------------|----------------|----------------|----------|--------------|--------------|
| <b>Rating:</b> | <b>1</b>       | <b>2</b>       | <b>3</b> | <b>4</b>     | <b>5</b>     |
|                | Very           |                |          |              | Very         |
|                | Unsatisfactory | Unsatisfactory | Neutral  | Satisfactory | Satisfactory |

**Score:**

**Feedback:**

Please elaborate on your rating score by providing feedback in the space below

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**3.6 The agency gave a concise presentation that flowed well.**

|                |                |                |          |              |              |
|----------------|----------------|----------------|----------|--------------|--------------|
| <b>Rating:</b> | <b>1</b>       | <b>2</b>       | <b>3</b> | <b>4</b>     | <b>5</b>     |
|                | Very           |                |          |              | Very         |
|                | Unsatisfactory | Unsatisfactory | Neutral  | Satisfactory | Satisfactory |

**Score:**

**Feedback:**

Please elaborate on your rating score by providing feedback in the space below

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**3.7 The agency presented with passion and the presentation was memorable.**

|                |                |                |          |              |              |
|----------------|----------------|----------------|----------|--------------|--------------|
| <b>Rating:</b> | <b>1</b>       | <b>2</b>       | <b>3</b> | <b>4</b>     | <b>5</b>     |
|                | Very           |                |          |              | Very         |
|                | Unsatisfactory | Unsatisfactory | Neutral  | Satisfactory | Satisfactory |

**Score:**

**Feedback:**

Please elaboration on your rating score by providing feedback in the space below

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**3.8 The design and art direction of all presentation materials were helpful in making the agency case**

|                |                |                |          |              |              |
|----------------|----------------|----------------|----------|--------------|--------------|
| <b>Rating:</b> | <b>1</b>       | <b>2</b>       | <b>3</b> | <b>4</b>     | <b>5</b>     |
|                | Very           |                |          |              | Very         |
|                | Unsatisfactory | Unsatisfactory | Neutral  | Satisfactory | Satisfactory |

**Score:**

**Feedback:**



Please elaborate on your rating score by providing feedback in the space below

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**3.9 The agency worked well together as a team.**

|                |                |                |          |              |              |
|----------------|----------------|----------------|----------|--------------|--------------|
| <b>Rating:</b> | <b>1</b>       | <b>2</b>       | <b>3</b> | <b>4</b>     | <b>5</b>     |
|                | Very           |                |          |              | Very         |
|                | Unsatisfactory | Unsatisfactory | Neutral  | Satisfactory | Satisfactory |

**Score:**

**Feedback:**

Please elaborate on your rating score by providing feedback in the space below

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**3.10 I felt like I had a connection with the Agency team. I liked the people and culture.**

|                |                |                |          |              |              |
|----------------|----------------|----------------|----------|--------------|--------------|
| <b>Rating:</b> | <b>1</b>       | <b>2</b>       | <b>3</b> | <b>4</b>     | <b>5</b>     |
|                | Very           |                |          |              | Very         |
|                | Unsatisfactory | Unsatisfactory | Neutral  | Satisfactory | Satisfactory |

**Score:**

**Feedback:**

Please elaborate on your rating score by providing feedback in the space below

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**3.11 The agency's business building recommendations (effectiveness) and the proposed pricing of the investment (efficiency) were compatible and appropriate.**

|                |                |                |          |              |              |
|----------------|----------------|----------------|----------|--------------|--------------|
| <b>Rating:</b> | <b>1</b>       | <b>2</b>       | <b>3</b> | <b>4</b>     | <b>5</b>     |
|                | Very           |                |          |              | Very         |
|                | Unsatisfactory | Unsatisfactory | Neutral  | Satisfactory | Satisfactory |

**Score:**



**Feedback:**

Please elaborate on your rating score by providing feedback in the space below

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**3.12 I wish the agency would have ...or I would have liked to have seen ...**

Please provide feedback in the space below

**Feedback:**

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**3.13 (INCLUDE IF THIS SCORECARD IS ANSWERED FOR LOSSES ONLY).....**

**The one thing that the agency was missing or the one thing that the agency could have done differently to win the business**

Please provide feedback in the space below

**Feedback:**

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**3.14 Please provide any other comments, observations or suggestions pertaining to the agency's performance during the review**

Please provide feedback in the space below

**Feedback:**

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***Thank you for taking the time to provide the agency with this helpful feedback.***