

**2010**

# **ANA Survey Research Report**

**Procurement:  
The Good, the Bad,  
and the Ugly**

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## Executive Summary

Procurement has now been a force in marketing services for about a decade. But for every success story, there are reports of procurement's bad behavior.

The three key stakeholders in the procurement process are: marketing procurement/sourcing professionals, marketing/marketing services professionals, and agency professionals. There are wide and disturbing gaps between both marketing procurement and marketing/marketing services and between marketing procurement and agencies in terms of the perceived contribution of procurement. Such gaps exist in virtually every area surveyed including how procurement defines value, whether procurement views marketing as an expense or investment, and how well procurement works with marketing and agencies. Further, the procurement function appears to have made little progress when current and historical research is compared.

The gaps between procurement and agencies are not totally unexpected, but those between procurement and marketing are extremely disconcerting. This less than optimal relationship between procurement and marketing is also likely to be negatively impacting the relationship between procurement and agencies.

It is incumbent on the marketing procurement community to rise up and take the feedback of this survey to heart to improve the industry's experiences with and perceptions on the craft of marketing procurement. This will be a journey and not a quick fix. As an initial step, ANA is providing a set of best practices that come from this survey's open-ended responses and discussions with senior marketing procurement professionals who have been involved with ANA. These best practices are grouped into two broad categories—collaboration and professional development:

### **Collaboration Best Practices**

- Alignment with leadership
- Goals of procurement and marketing must be in sync
- Agree on the definition of value
- Early involvement of procurement
- Understand that most advertising services are not commodities

### **Professional Development Best Practices**

- Marketing education
- Spend time with your agencies
- Find the right people

Details on these best practices can be found on page 34.

In addition, ANA is undertaking the following initiatives to help improve the procurement/marketing and procurement/agency relationships:

**ANA Procurement Task Force:** This group will meet regularly to address the issues identified in the survey. Agencies and appropriate outside consultants will be invited to contribute their perspective and thought leadership.

**ANA Procurement Mentoring Program:** An advisory group of senior-level procurement professionals at best-practice organizations will be assembled and then be made available to counsel and mentor individuals at other companies in procurement groups whose roles are in the initial or developing stages. More information can be found at [www.ana.net/procurementmentoring](http://www.ana.net/procurementmentoring).

Further, we encourage ANA members, particularly those with larger procurement and marketing groups, to take the survey tool and field the survey among their internal procurement and marketing groups (ideally coordinated by an unbiased third party) to assess the state of alignment (or not) between procurement and marketing. And if those ANA members are especially brave, they can do the same with their agencies—but it's suggested that be done initially with more established relationships.

## Introduction and Methodology

In order to take the pulse of the industry on the current state of marketing procurement, the ANA, in partnership with the 4A's, conducted a survey to measure practices and perceptions among professionals in three functional areas: procurement/sourcing, marketing/marketing services, and agencies.

The survey was conducted online during March 2010 among a total sample of 225 respondents, distributed as follows:

- 76 marketing procurement/sourcing professionals
- 59 marketing/marketing services professionals
- 90 agency professionals

The agency respondents who qualified for inclusion in the study had to have checked “Yes” to the statement “I have significant or ongoing/regular interaction with client procurement or client procurement has a material impact on my agency’s servicing or prospecting activities or compensation arrangements.” Agencies were asked to answer the survey either (a) based on their experience with a single client if the respondent deals primarily with one client that has active procurement involvement or (b) based on their average/overall experience if working with multiple clients.

Prior surveys on this topic were conducted in March/April 2005 and November 2007. In some cases, survey results are trended against data from the 2005 and 2007 surveys. Survey results were presented at the ANA’s 2010 Advertising Financial Management Conference during a panel discussion, which consisted of the following marketing procurement professionals: Jim Akers, senior director, worldwide procurement global category lead, commercialization and communications, **Pfizer Inc.**; Chris Baker, senior director, corporate purchasing, **Heineken USA**; Kim Kraus, director, brand building sourcing strategy, **The Procter & Gamble Company**; and Lisa Figel, group category manager, U.S. agency procurement, **Johnson & Johnson Consumer Companies**.

### Interpretation of Survey Information

Please note that while the client procurement, client marketer, and agency respondent sample sizes are statistically valid, it should be recognized that the participant samples in this survey were not matched to direct interactions between procurement and marketing at the same firms or mapped to specific agency/procurement relationships.

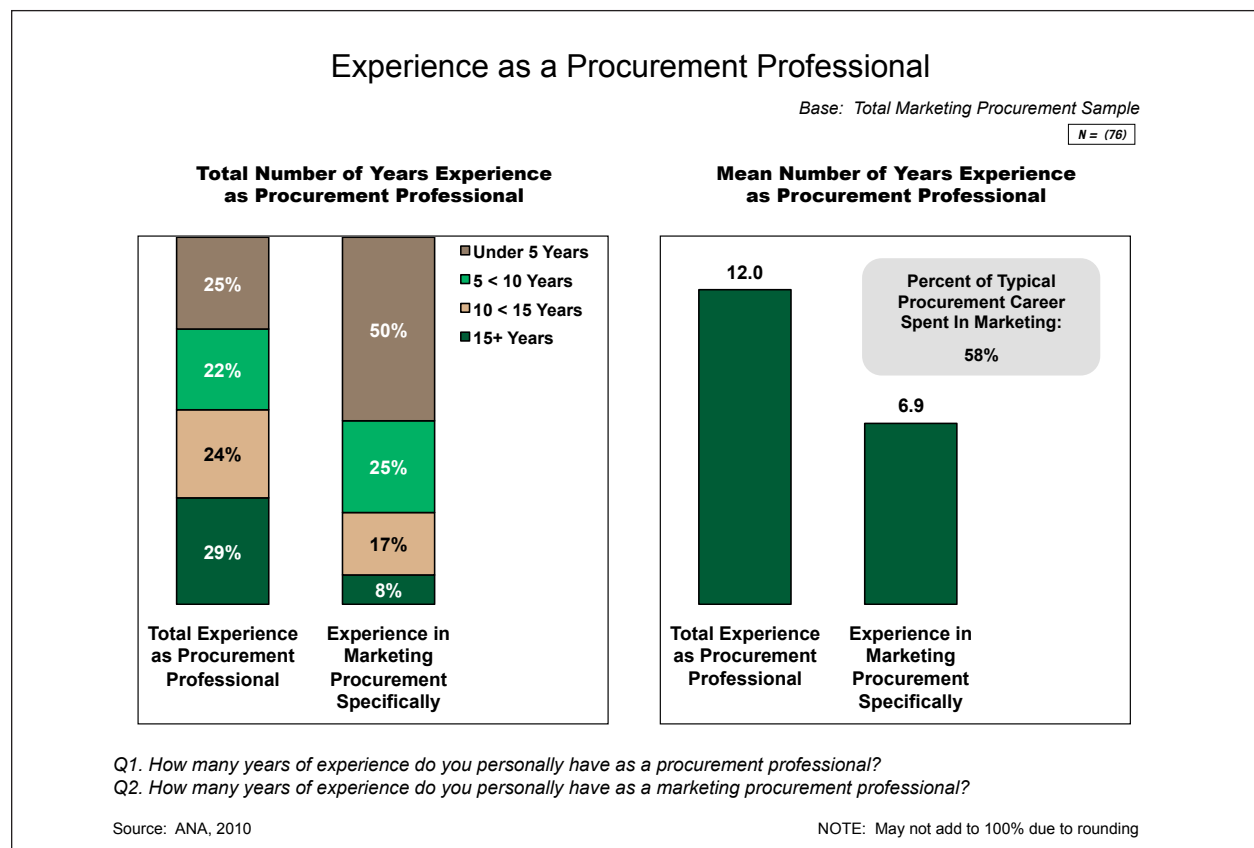
# Detailed Findings

## Number of Years of Experience for Procurement Professionals

The typical marketing procurement professional has spent somewhat more than a decade in the field of procurement, with much of this experience being gained in the sub-specialty of marketing procurement.

On average, the marketing procurement specialists surveyed in 2010 reported having 12 years of experience in the field of procurement. About three-fifths of this time (58%, or 6.9 years) has been in marketing procurement.

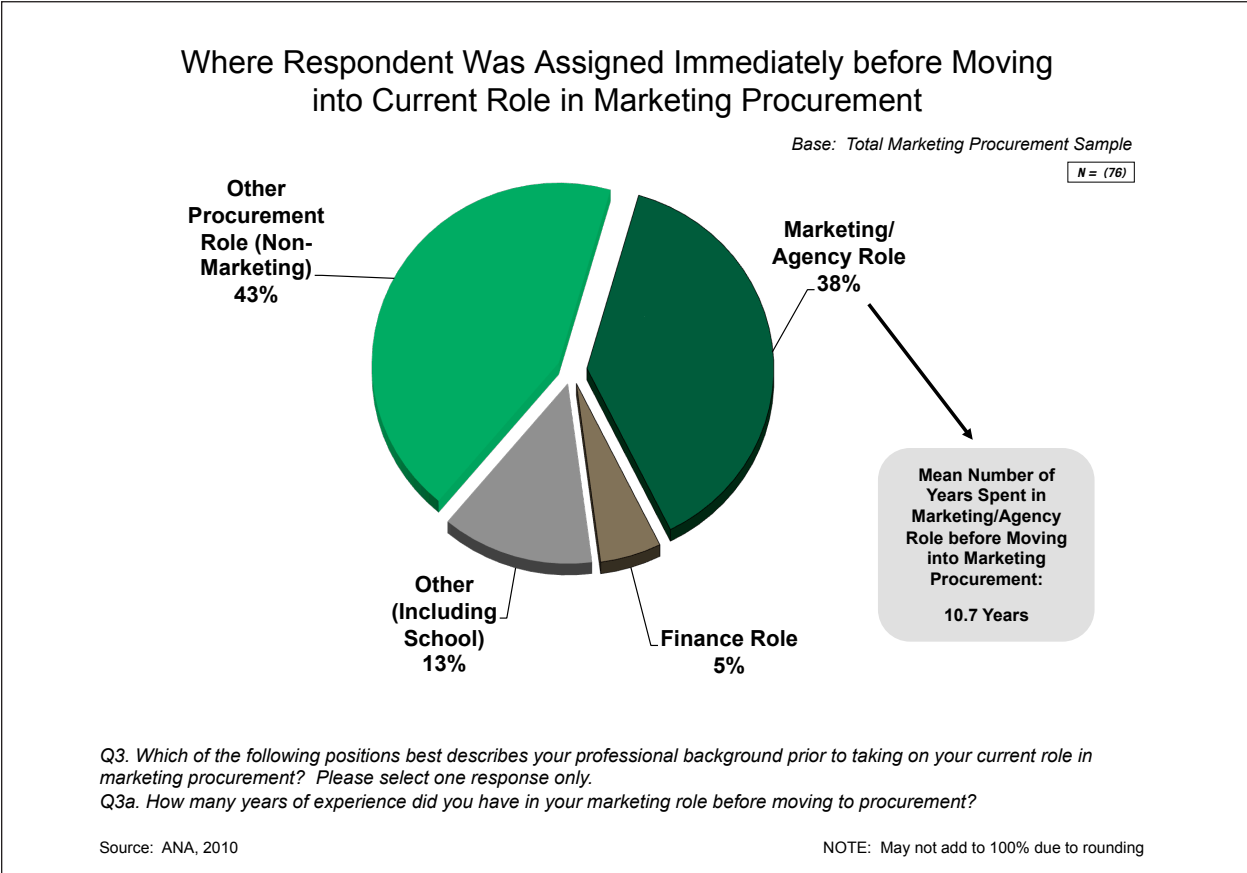
The average length of time in the overall field of procurement for a marketing procurement executive has increased over the past three years, rising from 10 years in 2007 to 12 years in the current survey. Directionally this makes sense as the 2007 and 2010 surveys were conducted about 2½ years apart.



# Background of Procurement Professionals

The vast majority of marketing procurement executives came from either a non-marketing procurement position or a marketing/agency role. Those respondents who were currently employed as marketing procurement executives were slightly more likely to report having previously been in a non-marketing procurement role than a marketing/agency position (43% vs. 38%).

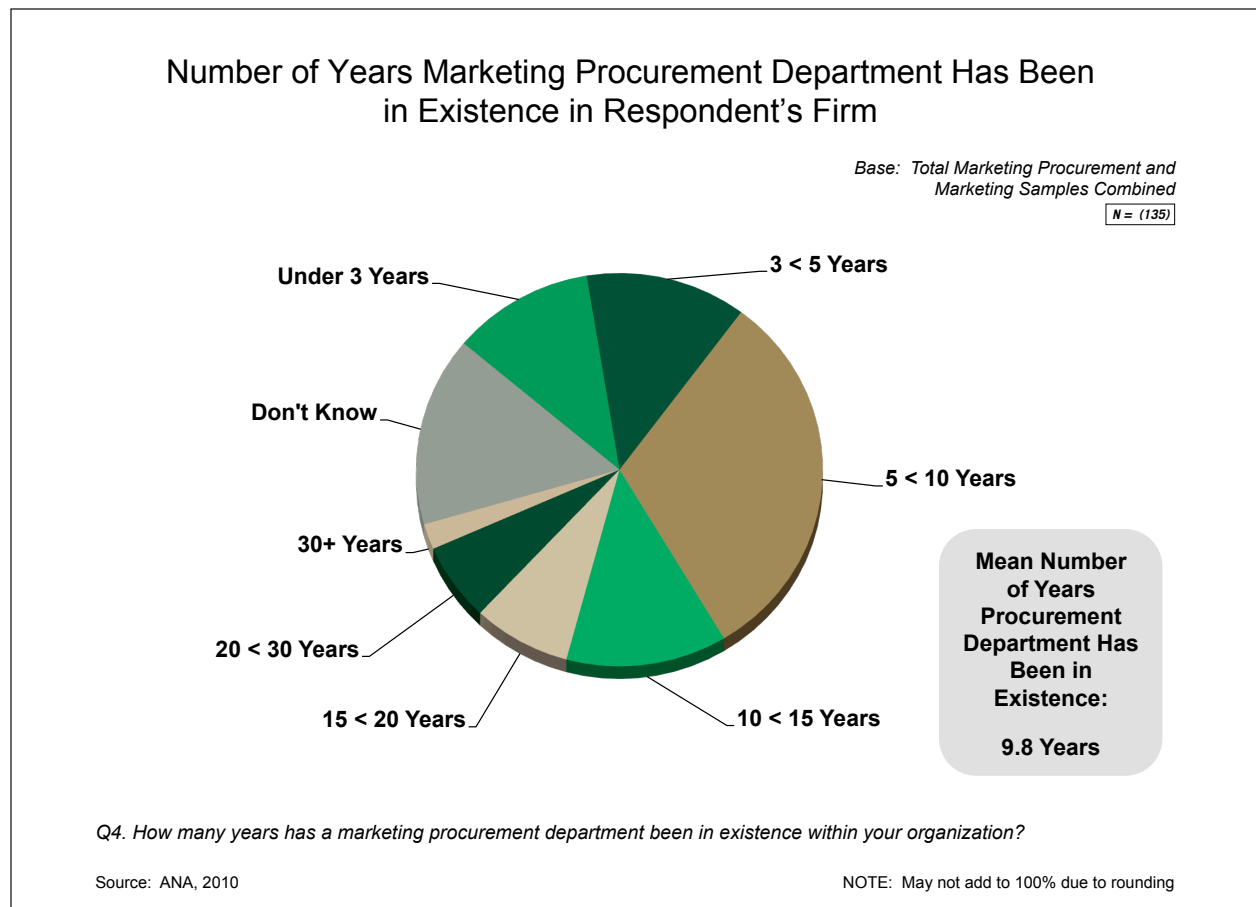
The findings reveal that those marketing procurement executives who come from a marketing or an agency background bring a substantial amount of knowledge from their former positions; the typical transferee has about 11 years of marketing/agency experience prior to taking on a marketing procurement assignment.



# History of Marketing Procurement Departments within Companies

The typical marketing firm reported that its marketing procurement department was created about ten years ago. This is in line with the findings from the 2007 study, in which respondents reported that, on average, their marketing procurement department had been created about seven years prior to the survey.

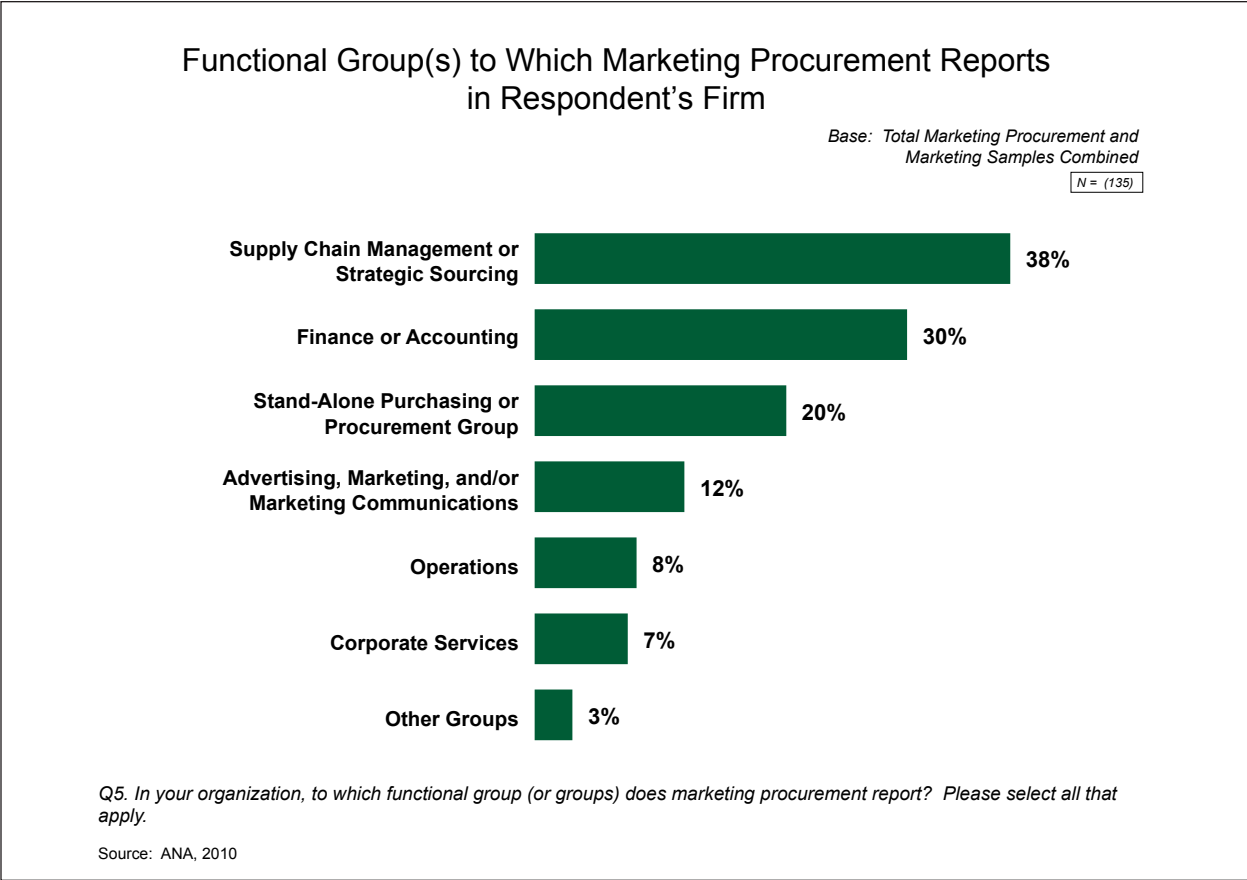
Marketing procurement departments are more likely to be found in larger firms that have larger advertising and marketing budgets. The great majority of people working in marketing procurement reported that their firms have an annual revenue of \$10 billion or greater, and 85% have advertising and marketing budgets of at least \$200 million.





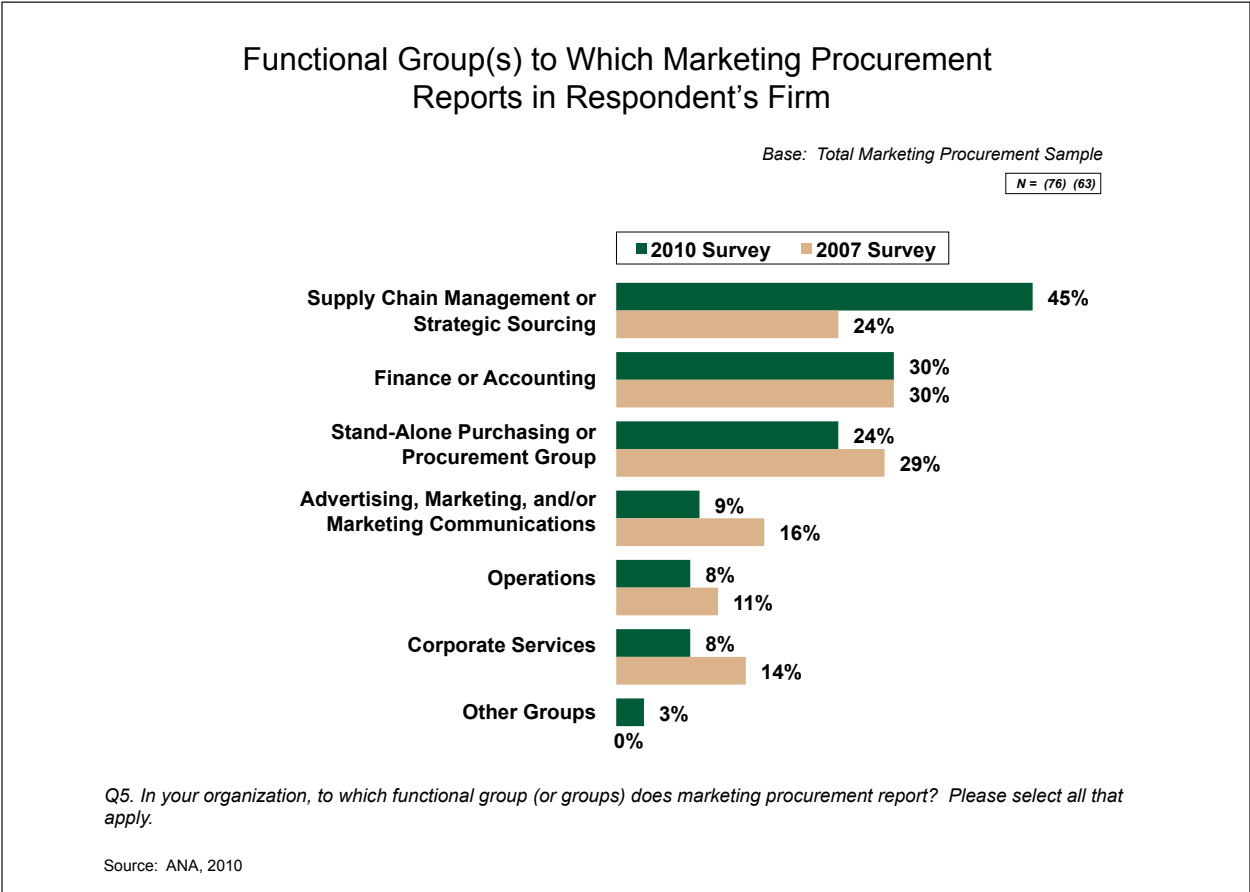
# Reporting Structure of the Marketing Procurement Department

Client-side marketers both in marketing and procurement report that marketing procurement most commonly reports to supply chain management/strategic sourcing (38%). This is followed by finance/accounting (30%) and a stand-alone purchasing/procurement group (20%).



# Procurement Is More Likely to Report to Supply Chain Management or Strategic Sourcing in 2010 vs. 2007

It is noteworthy that when analyzing only the procurement sample for 2010, respondents were almost twice as likely as their 2007 counterparts to state that the procurement department is reporting to supply chain management or strategic sourcing (45% vs. 24%).

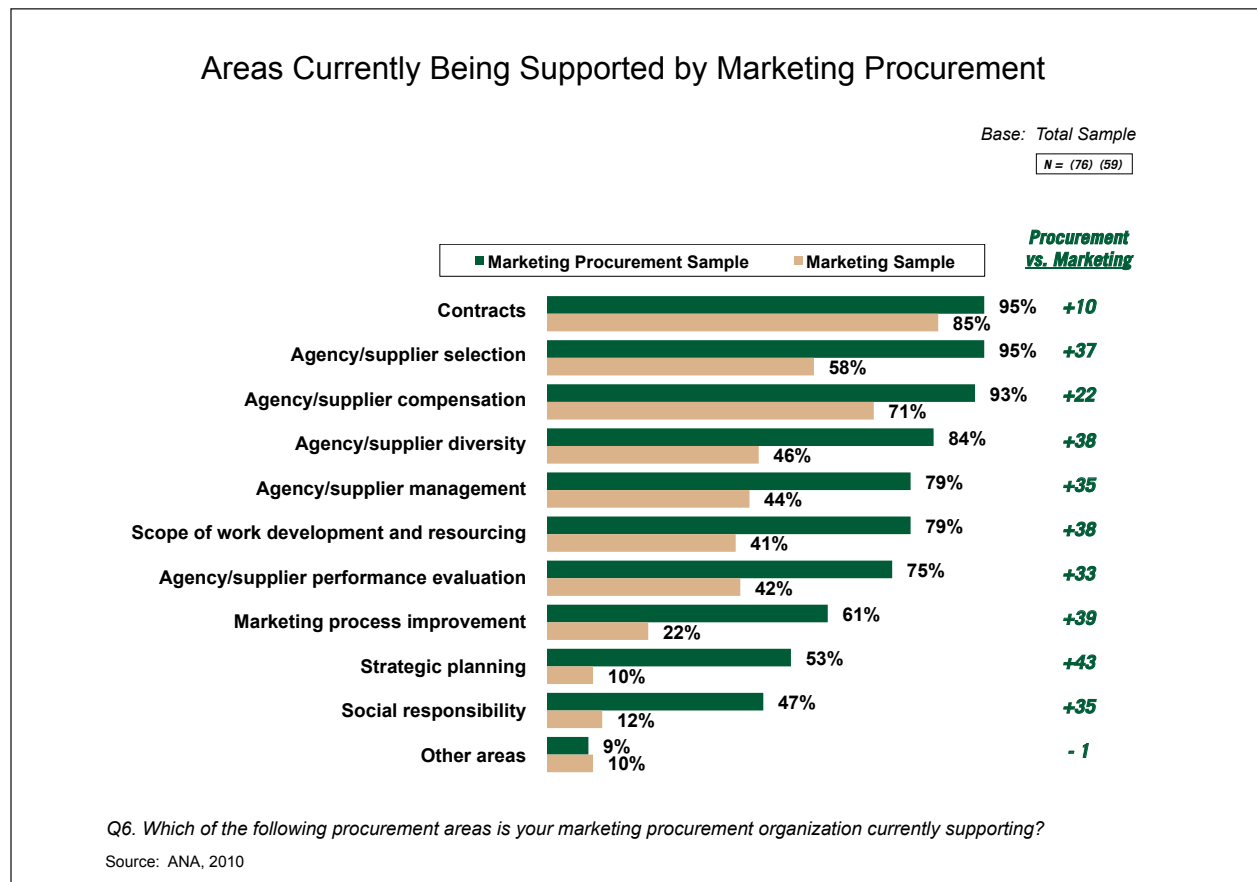


# Views of Marketing and Procurement on Areas Procurement Supports

There is a strong disconnect between procurement and marketing professionals when it comes to reporting which areas are being supported by marketing procurement, with the procurement professionals much more likely to see themselves as offering support in virtually every area asked about.

The greatest gaps between the perceptions of procurement and marketing regarding the supportive role of marketing procurement relate to the areas of “strategic planning,” “marketing process improvement,” “agency/supplier diversity,” and “scope of work development and resourcing.” But gaps are wide in all areas.

The numerical differences between the two groups aside, at present, both procurement and marketing see the areas most likely to be supported by procurement to be “contracts,” “agency/supplier selection,” and “agency/supplier compensation.”



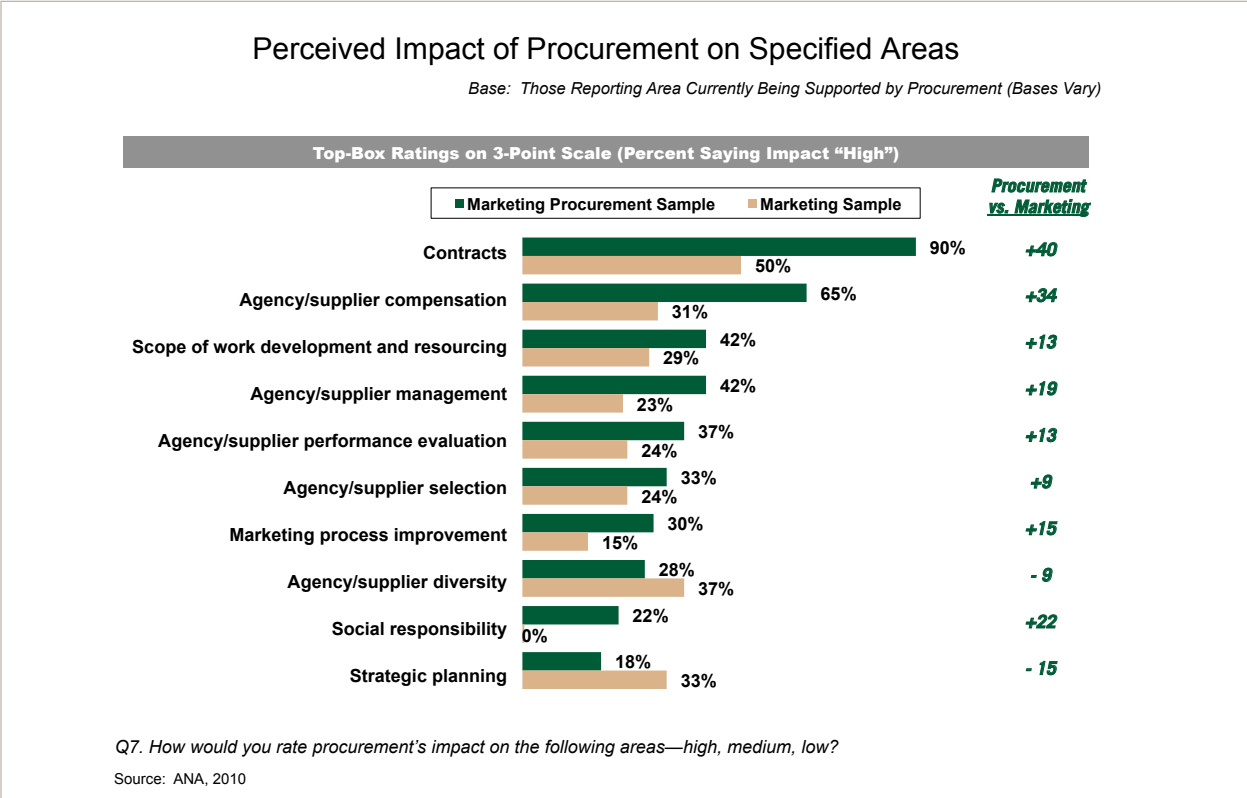
# Rating the Impact of Procurement

The procurement and marketing respondents who reported that marketing procurement was involved in a given area were asked to rate procurement’s impact in that area as “high,” “medium,” or “low.”

Not surprisingly, the procurement professionals were more likely than were the marketing respondents to rate procurement’s impact as “high” in virtually every area of procurement’s involvement. The greatest gaps between procurement and marketing were in their perceptions of procurement’s impact in the areas of “contracts” (a 40-point difference) and “agency/supplier compensation” (a 34-point difference).

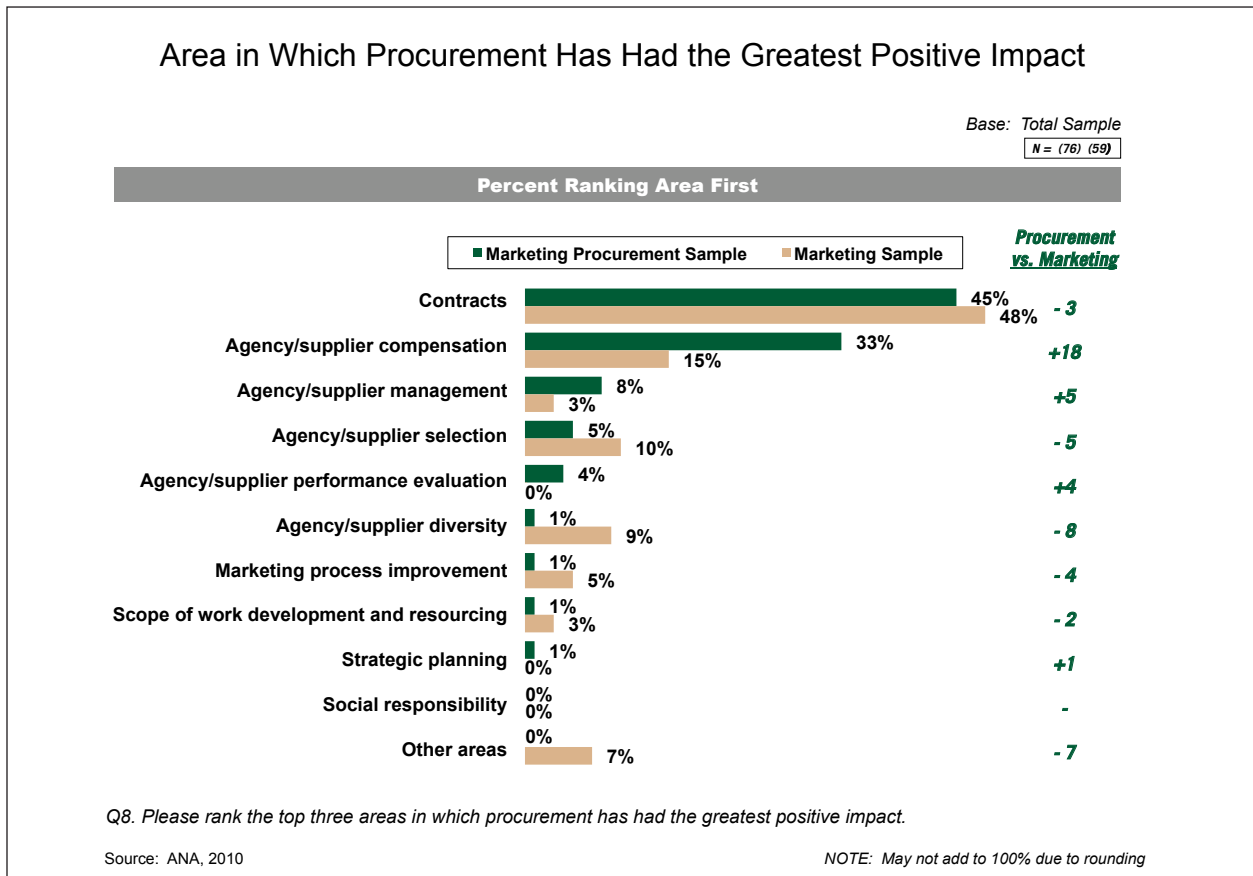
It is inevitable that there will be a mismatch of views between procurement and the agencies as to the benefit of the procurement function. It is where marketing shows lukewarm support for procurement activity that all procurement people should ask, “Are they talking about me?” Procurement cannot thrive unless we are winning the hearts and minds of our own marketers first, and then by inference, the agencies.

Chris Baker  
Senior Director, Purchasing  
Heineken USA

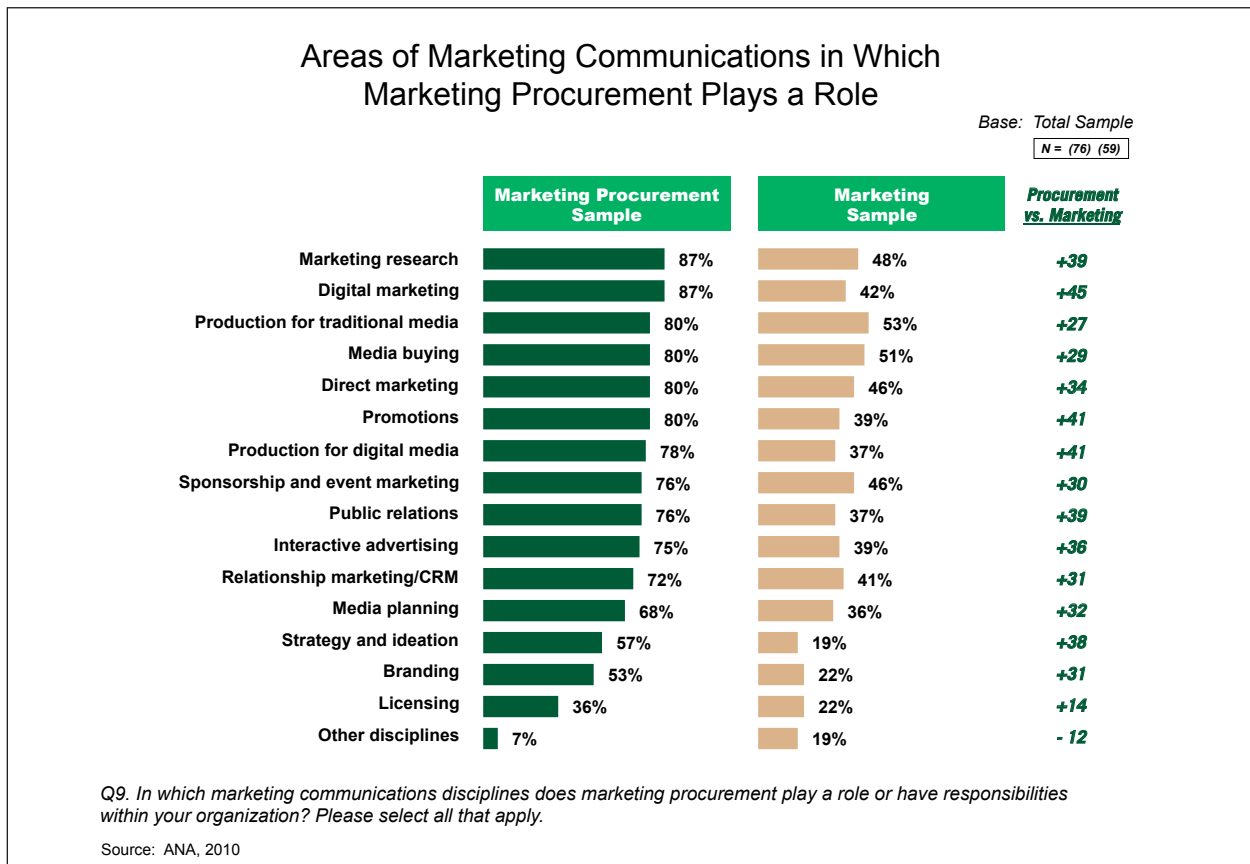
# The Positive Impact of Procurement

Nearly one-half of both the procurement and marketing professionals surveyed in 2010 agreed that procurement has had its greatest impact in the area of “contracts.” The area next most often mentioned by both groups is “agency/supplier compensation,” although this is mentioned twice as often by procurement professionals (33% vs. 15% of marketers).



## Procurement's Role in Marketing Communications

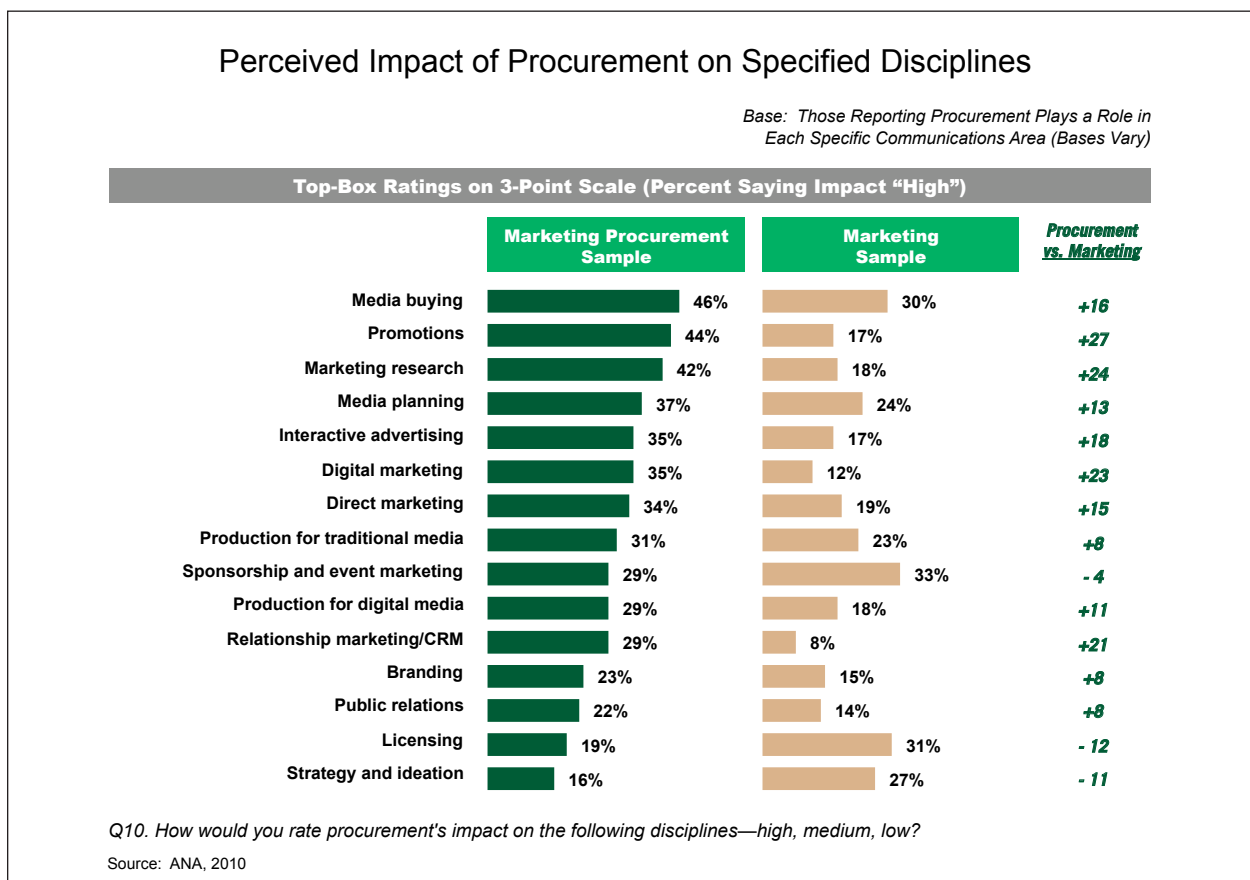
When it comes to the areas of marketing communications in which procurement is seen to play a role, the perceptions of procurement and marketing executives are worlds apart. In ten of the specific areas asked about in the 2010 survey, at least three-quarters of procurement professionals reported that procurement played a role. In contrast, the highest number of marketers reporting a role for procurement was 53% (for production for traditional media). With a few exceptions, the percentage point differences between procurement and marketing respondents ranged from 30 to 45 points on this question.



# The Impact of Procurement in Marketing Communications

The procurement and marketing respondents who reported that procurement was involved in a given area of marketing communications were asked to rate procurement's impact in that area as "high," "medium," or "low."

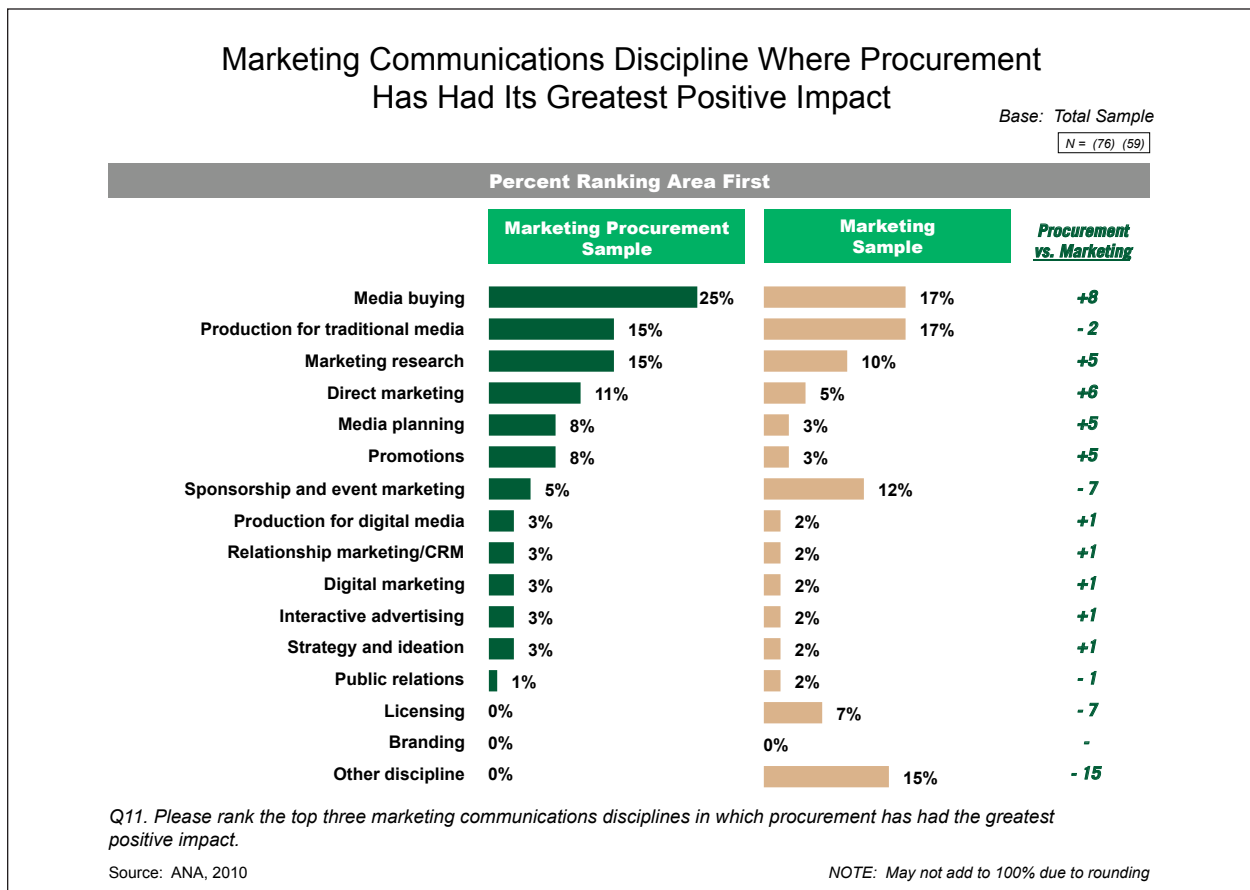
Not surprisingly, the procurement professionals were more likely than the marketing professionals to rate procurement's impact as "high" in almost every area of procurement involvement. The greatest gaps between the procurement and marketing professionals were in regard to the impact of procurement in the areas of "promotions" (a 27-point difference), "marketing research" (a 24-point difference), and "digital marketing" (a 23-point difference).



# Procurement's Benefits to Marketing Communications

In general, the findings indicate that both procurement and marketing professionals agree that procurement has had its greatest positive impact in the areas of “media buying” and “production for traditional media.”

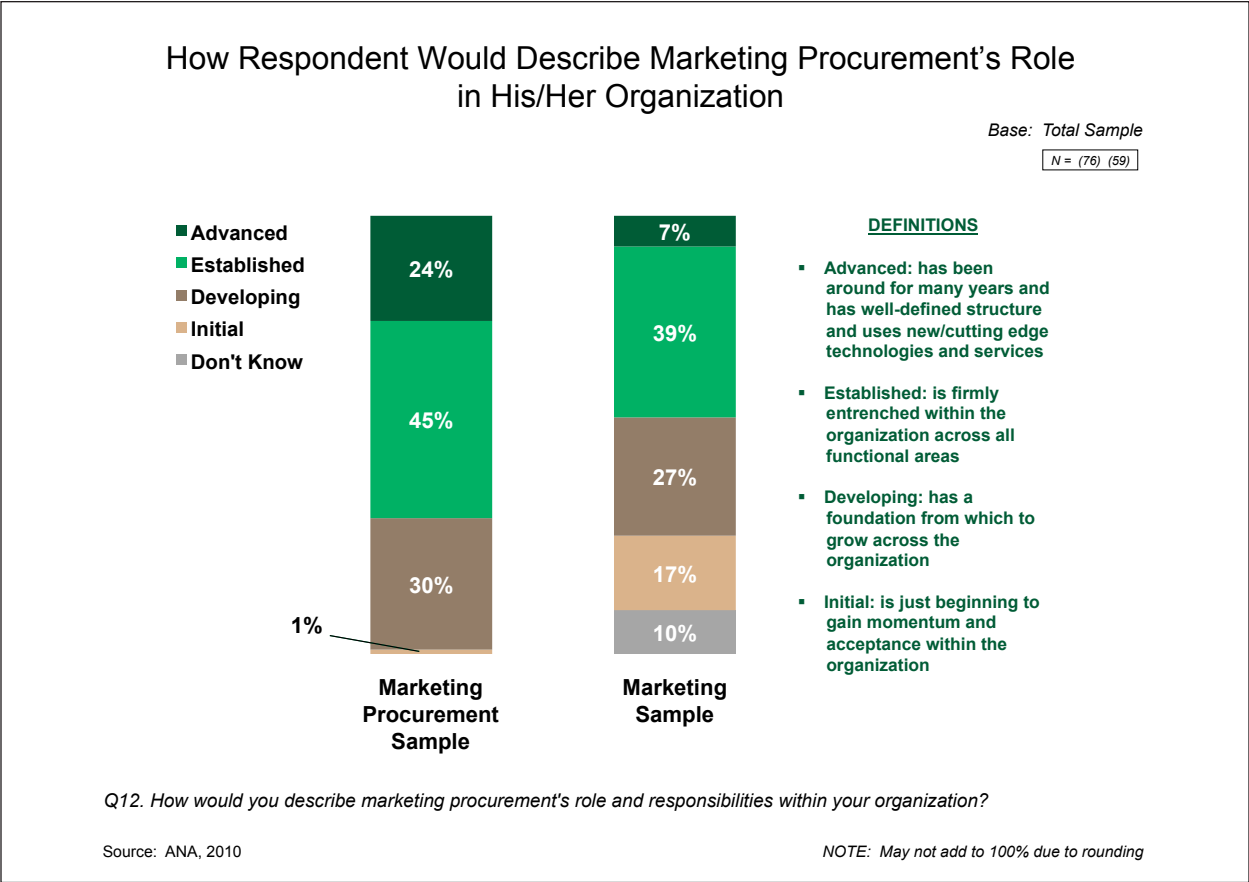
While procurement executives see “marketing research” as the third ranking area of positive procurement impact, marketers rank sponsorship/event marketing third.





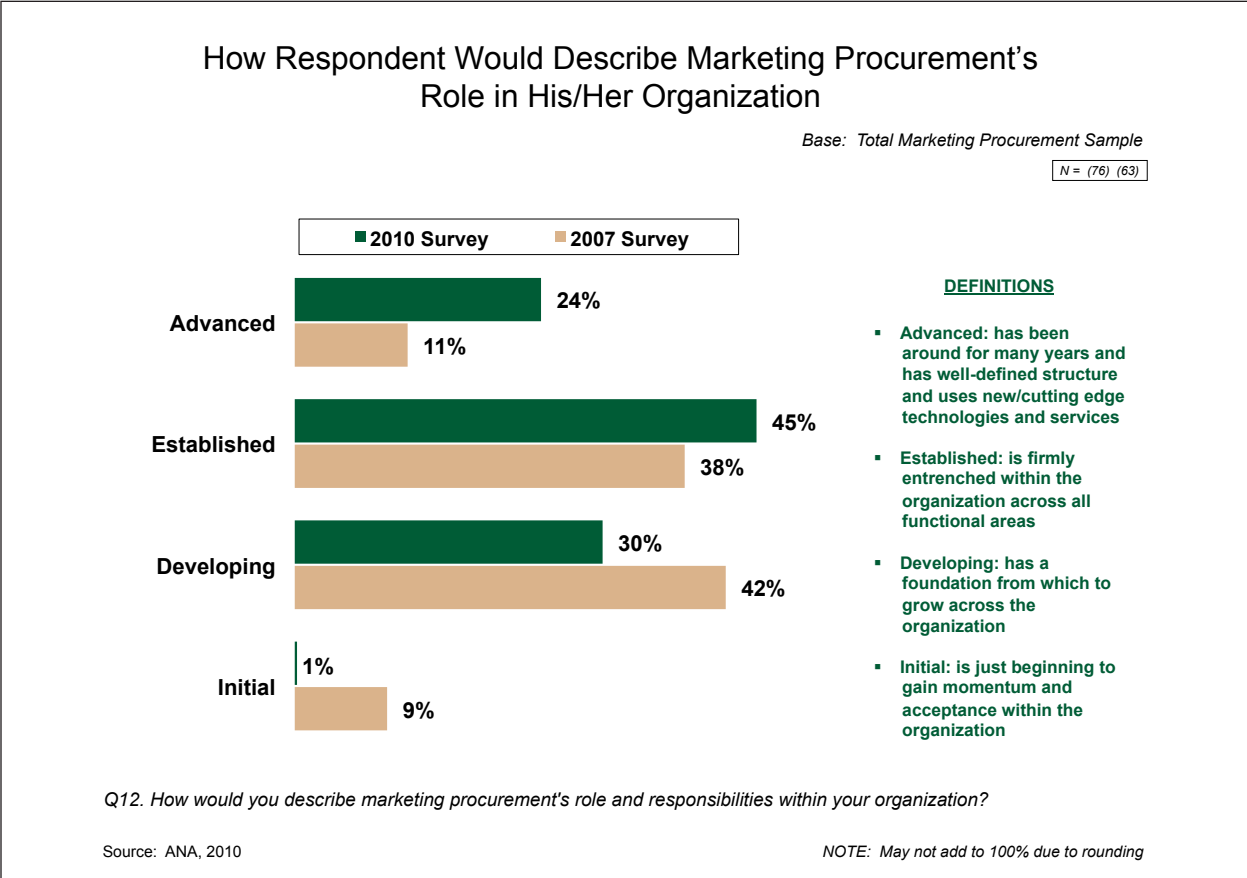
# Procurement's Integration within the Organization

Procurement professionals perceive marketing procurement's level of integration in the organization as significantly more evolved than do marketers. While 24% of procurement respondents see the position of marketing procurement as "advanced," only 7% of marketers see it this way. In contrast, while a single marketing procurement respondent felt that his/her department was in the "initial" phase of integration, 17% of the marketers surveyed perceived it this way.



# Procurement Perceives a Growing Role for Itself

There is a clear trend among marketing procurement professionals to see the role of marketing procurement as maturing. The proportion of marketing procurement respondents reporting procurement's role as "advanced" more than doubled between 2007 and 2010 (from 11% to 24%), and the number reporting it as "established" increased somewhat (from 38% to 45%).



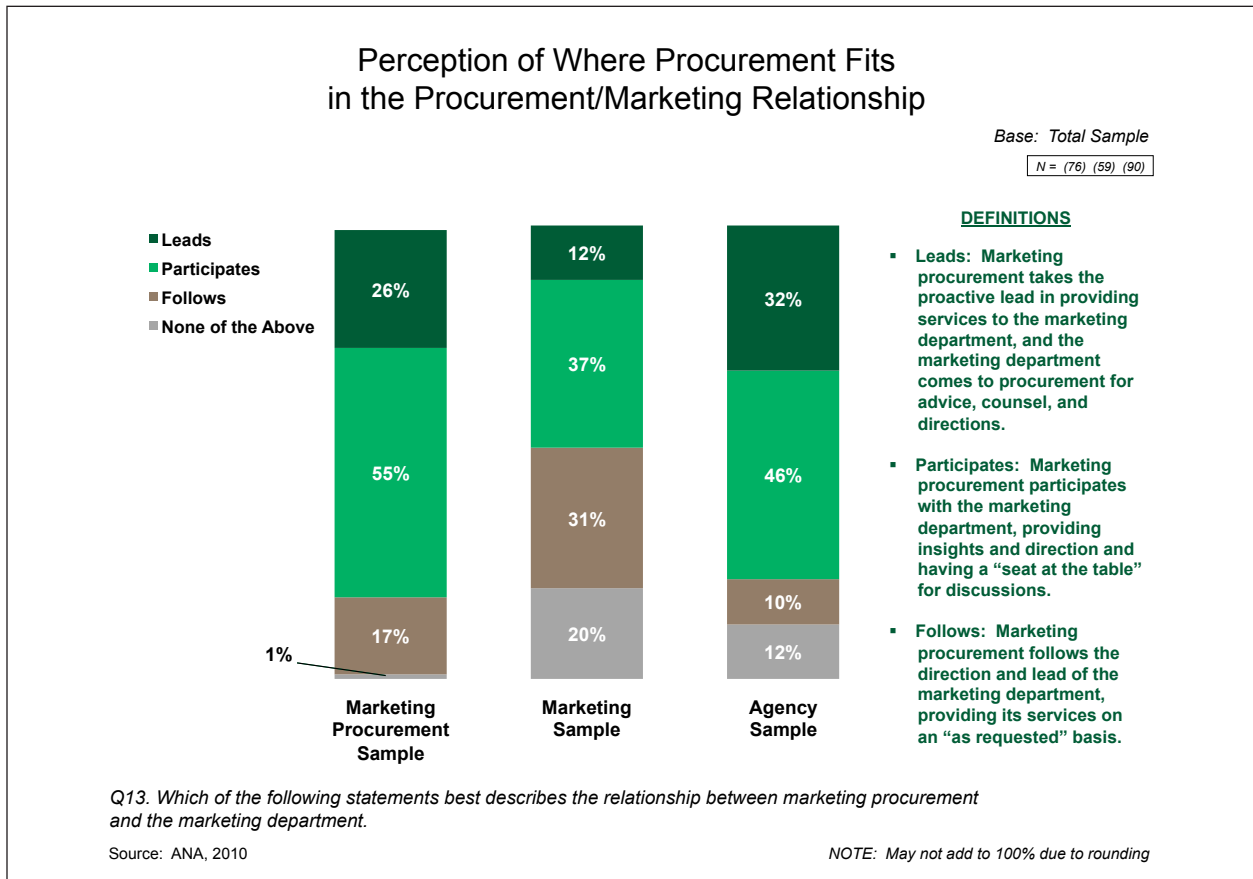
# Views on Procurement as a Leader, Participator, or Follower

(Note: from this point forward, charts also include data collected from agency respondents.)

There are meaningful differences among the three stakeholder groups' views of marketing procurement's influence.

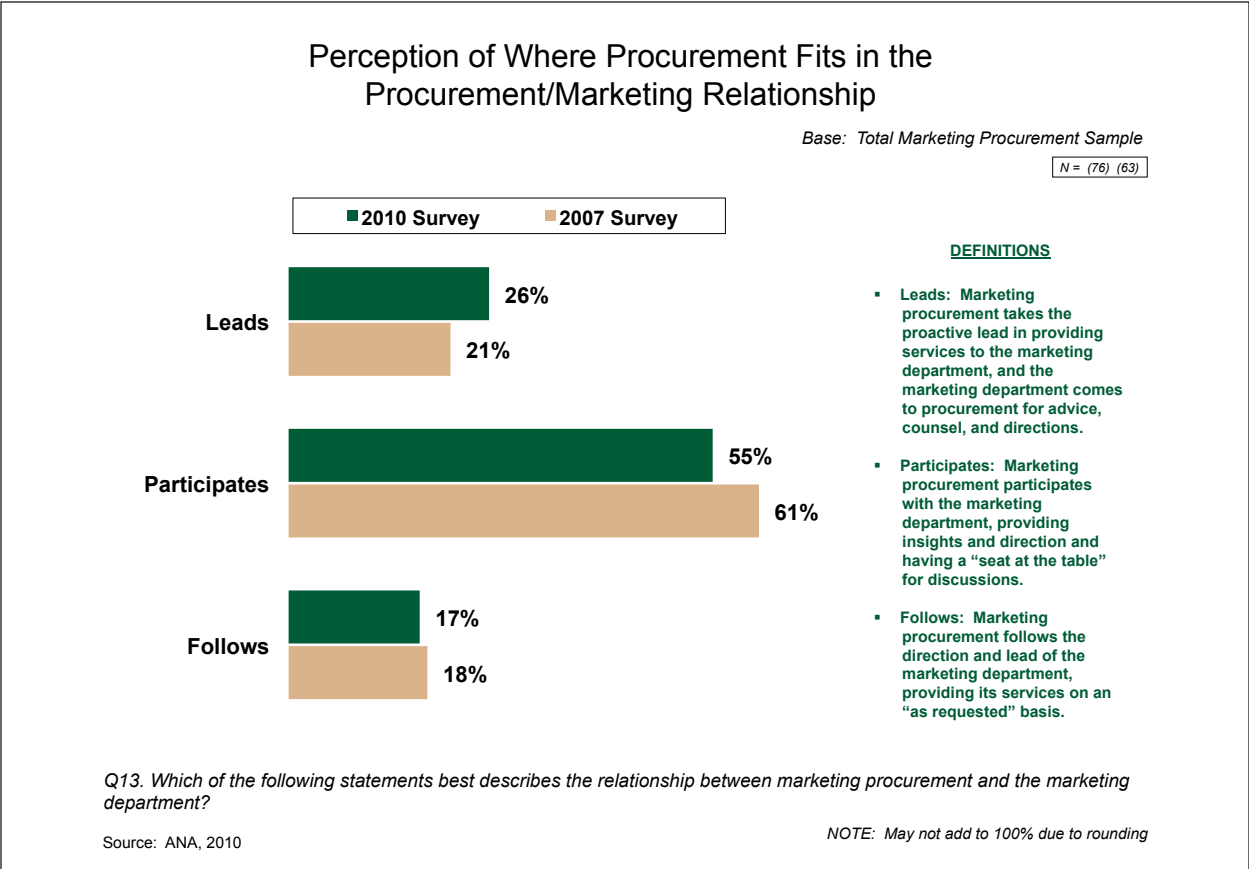
Marketing procurement professionals are more likely to see marketing procurement as a leader than as a follower (26% vs. 17%). In contrast, marketing respondents are more than twice as likely to see marketing procurement as a follower rather than as a leader (31% vs. 12%).

Interestingly, agency executives are even more prone than marketing procurement professionals to see marketing procurement as leading the procurement/marketing relationship (32% vs. 26%).



# Procurement Sees Itself Leading More in 2010 vs. 2007

The proportion of marketing procurement professionals who see themselves as leaders in the procurement/marketing relationship appears to have increased somewhat over the past three years (from 21% to 26%), while the number perceiving themselves simply as participants decreased (from 61% to 55%). The proportion of marketing procurement executives reporting that they are followers in the relationship has remained essentially unchanged between 2007 and 2010.



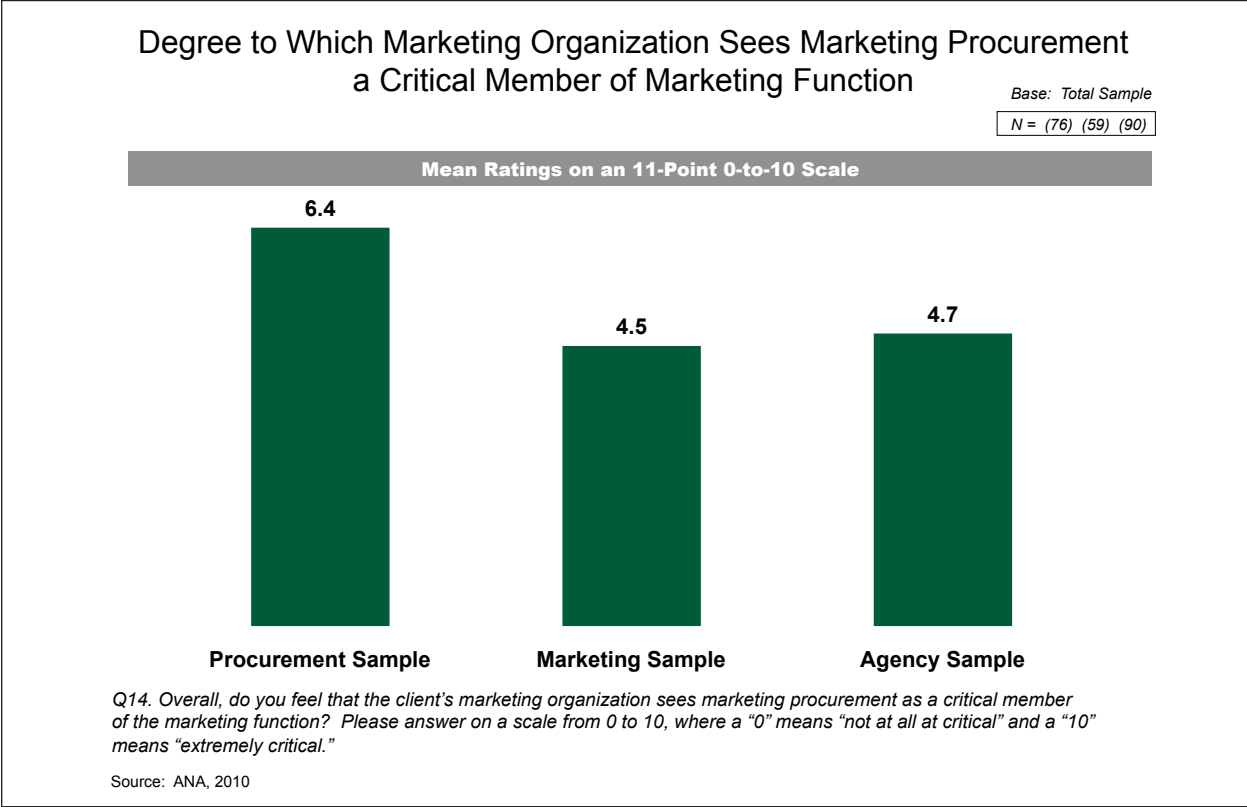
# Procurement’s Role as a Critical Member of the Marketing Function

Utilizing a 0-to-10 rating scale, where “10” meant “extremely” and “0” meant “not at all,” all three stakeholder groups surveyed were asked to rate the degree to which they believed marketing sees marketing procurement as a critical member of the marketing function.

An analysis of the mean ratings reveals that marketing procurement professionals have an inflated notion of how they are perceived by marketers. The mean rating among the procurement respondents was 6.4 while among the marketers themselves it was only 4.5. The mean score among agency respondents (4.7) paralleled that among the marketing professionals surveyed.

What procurement needs to do is learn the marketing and advertising functions and know them better than marketing, then negotiate, armed with valid benchmarks and fair balance, to arrive at a reasonable deal where both marketing and agency are motivated to grow the brand beyond realistic expectations. Procurement must *earn* a seat at the table.

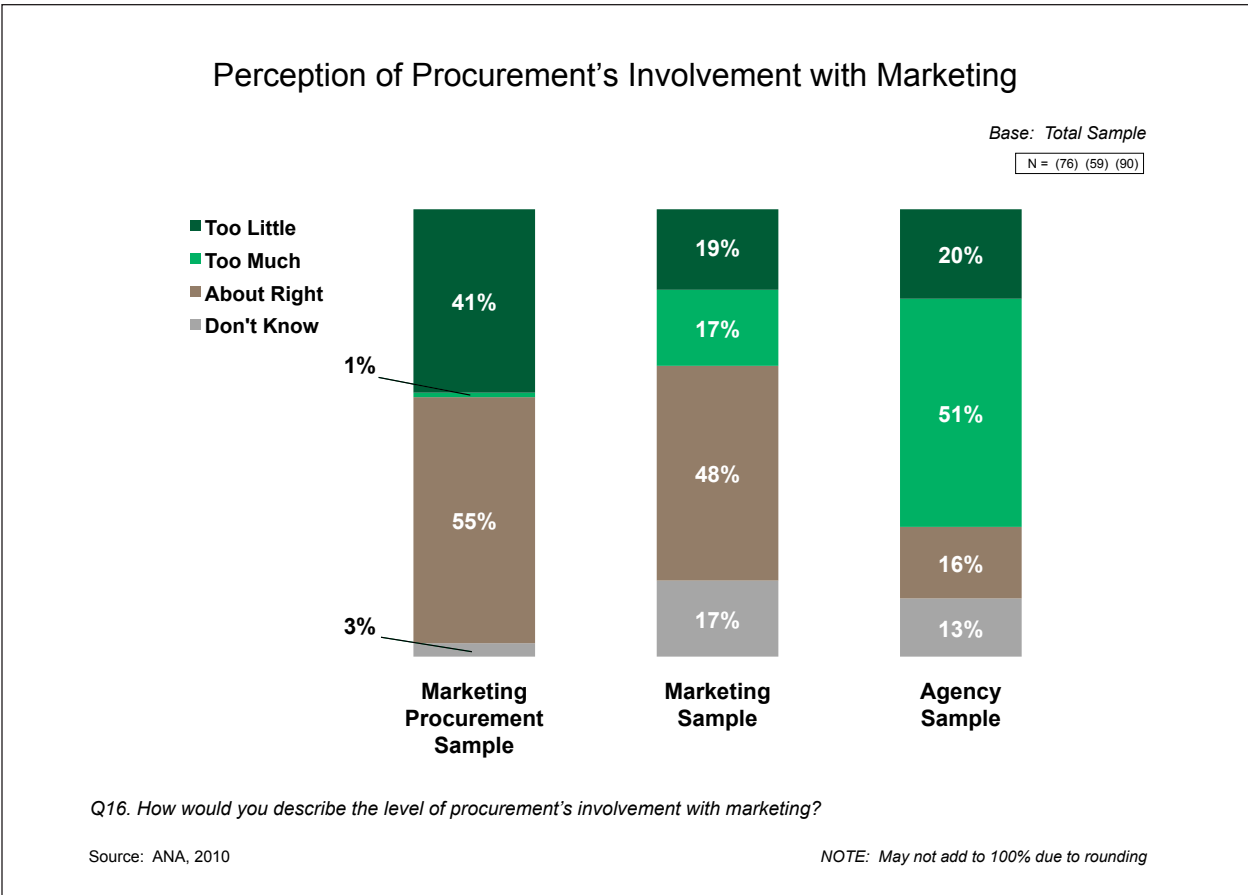
James R. Zambito  
*Global Marketing Group Controller*  
**Johnson & Johnson**  
 Co-Chair, ANA Advertising Financial  
 Management Committee



# Disparate Views of Procurement’s Involvement with Marketing

When it comes to the perceptions regarding the extent to which procurement has been integrated into the marketing process, the three stakeholder groups are worlds apart. About one-half of both marketing procurement and marketing professionals feel that the level of procurement’s involvement is “about right.” However, while most of the remaining procurement executives (41%) feel that they have “too little” involvement only a few marketers (19%) agree with this.

Not surprisingly, almost no procurement professionals would agree that procurement has “too much” involvement with marketing. In contrast, the majority of agency respondents (51%) see procurement as being too involved with the marketing process.



## Disparate Views of Procurement's Involvement with Agencies

The majorities of both procurement professionals (62%) and marketing respondents (53%) feel that the level of procurement's involvement with agencies is "about right." However, while most of the remaining procurement respondents (34%) feel that they have "too little" involvement in the agency relationship, relatively few marketers (17%) feel this way.

When it comes to the perception that procurement's has "too much" involvement with the agencies, almost no procurement professionals see things this way. In contrast, the majority of agency respondents (58%) see procurement as being too involved with the process. Only 14% of marketers feel procurement is too involved with the agencies.

Agencies are always being told that their performance criteria should be linked to the advertiser's marketing and sales objectives to ensure alignment of interests, even if the agency does not control everything that impacts the results. Similarly, it would make sense that procurement's performance measures should be aligned with the marketing objectives. This would ensure that everyone is focused on the same goals and avoid agency and procurement discussions being solely a cost-cutting exercise that ultimately does not serve the best interests of the agency or client.

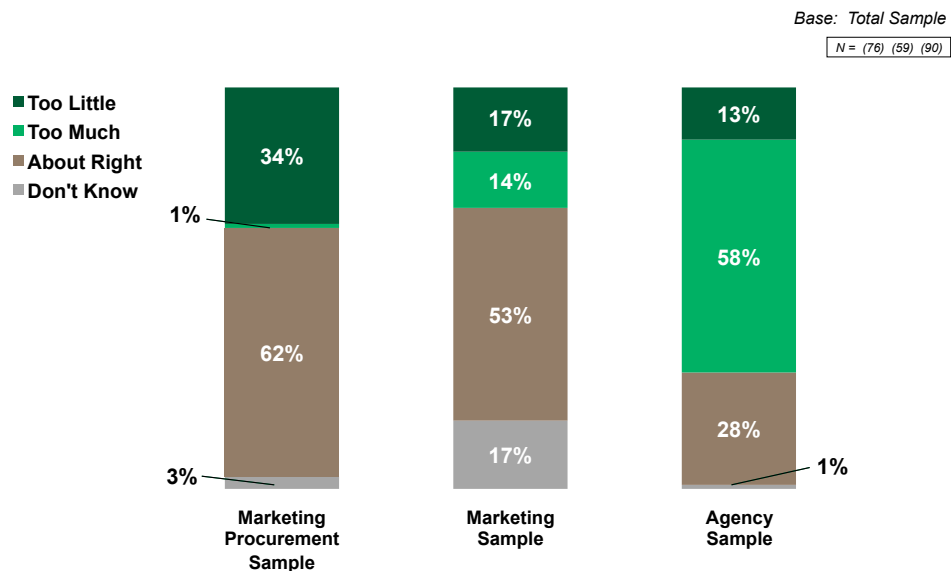
TBWA\

TBWA\CHIAT\DAY

Neal Grossman

Chief Compensation Officer, TBWA\Worldwide  
Chief Operating Officer, TBWA\Chiat\Day, LA

Perception Of Procurement's Involvement With The Agencies



Q17. How would you describe the level of procurement's involvement with the agency(s)?

Source: ANA, 2010

NOTE: May not add to 100% due to rounding

# The Relationship between Procurement, Marketing, and Agencies

In general, there is a great disconnect among the three stakeholder groups regarding their perceptions of the health of the relationships between them.

- The Relationship between Procurement and Marketing:** While virtually all marketing procurement professionals (97%) feel this is a healthy relationship, only 71% of marketers and 50% of agency respondents see it this way.
- The Relationship between Procurement and the Agencies:** While the vast majority of marketing procurement professionals (91%) feel this is a healthy relationship, only 56% of marketers and 40% of agency respondents see it this way.
- The Relationship between Marketing and the Agencies:** The vast majorities of all three stakeholder groups perceive the marketing/agency relationship as at least somewhat healthy. However, and as might be expected, agency respondents are significantly more likely than the other two stakeholder groups to say this relationship is “extremely/very” healthy.

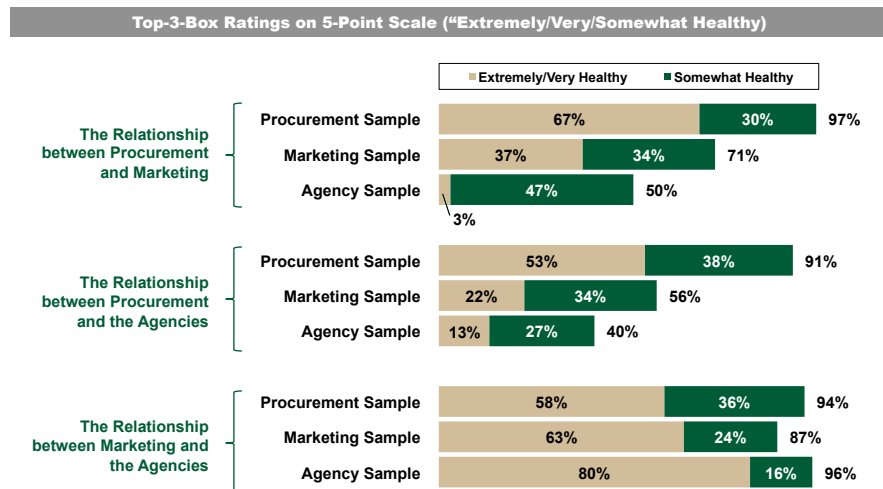
The survey reveals significant gaps between agencies and client procurement. There is an opportunity for agencies to reach out to procurement to foster more strategic and positive working relations. It also seems apparent that agencies must engage client marketing in the dialogue.

Tom Finneran  
*EVP Agency Management*  
**4A's**



## Perceptions of Health of Relationships Between Procurement, Marketing, and Agencies

Base: Total Sample  
 N = (78) (59) (90)



Q18. How would describe the health of the relationships between procurement, marketing, and the agency(s)—extremely healthy, very healthy, somewhat healthy, not too healthy, not at all healthy?

Source: ANA, 2010



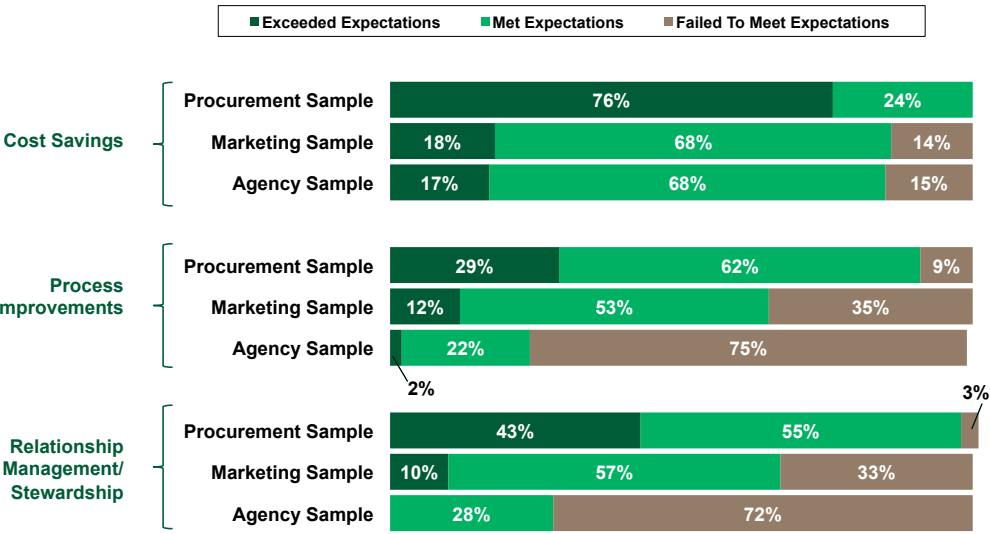
# Procurement's Performance in Cost Savings, Process Improvements, and Relationship Management

In general, across all three areas evaluated, procurement professionals are significantly more likely to feel marketing procurement has exceeded expectations than are marketers and agency respondents.

- Cost Savings:** In this area, the vast majority of procurement professionals (76%) feel they have exceeded expectations and the remainder feel they have met expectations. In contrast, the majorities of both marketing and agency respondents feel that marketing procurement has simply met expectations (68% and 68%, respectively).
- Process Improvements:** In this area, the three stakeholder groups are poles apart. While 91% of procurement professionals perceive that marketing procurement has met or exceeded expectations in this area, only 65% of marketers and a mere 24% of agency executives feel this way.
- Relationship Management:** In this area, again, the three stakeholder groups have widely different views. Nearly all procurement professionals (98%) feel marketing procurement has met or exceeded expectations. Alternatively, only 67% of marketers and only 28% of agency respondents feel that marketing procurement has at least met expectations in this area.

Perceptions of How Well Procurement Has Delivered in Terms of Specified Benefits

Base: Those Answering



Q15. How well has procurement delivered in terms of (benefit)—exceeded expectations, met expectations, failed to meet expectations?

Source: ANA, 2010

NOTE: May not add to 100% due to rounding

# The Changing Views of the Expectations of Procurement

These same questions were asked of procurement and marketing respondents in the 2005 survey on this topic. The responses in all areas—cost savings, process improvements, and relationship management/stewardship—have held steady.

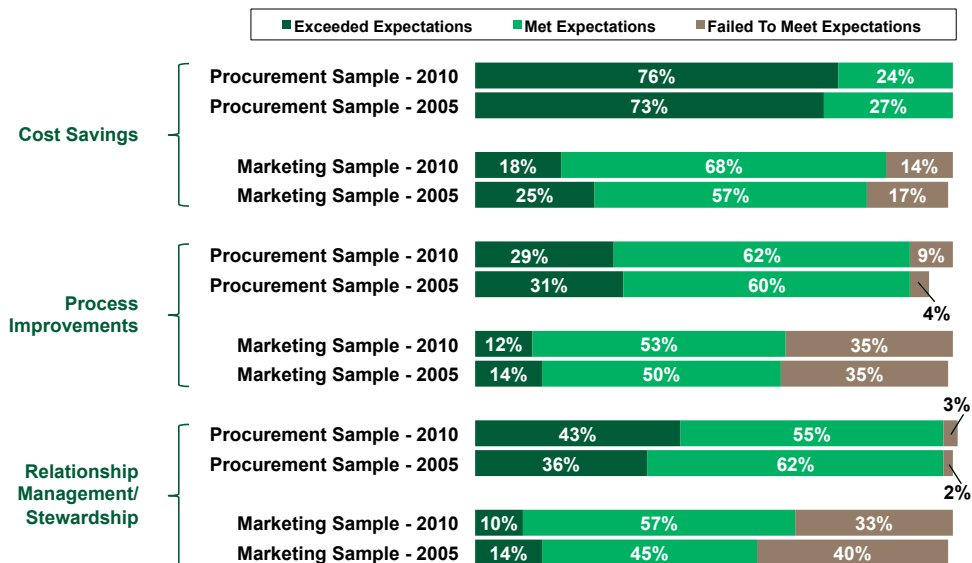
The lack of support that procurement’s own marketing function expresses for procurement’s role in process and relationship management has to be a cause for concern for the procurement community. For only 65% and 67%, respectively, to express that procurement has met or exceeded expectations should be a wakeup call. Especially on process; this is where procurement people should excel.

Chris Baker  
Senior Director, Purchasing  
Heineken USA



## Perceptions of How Well Procurement Has Delivered in Terms of Specified Benefits—2010 vs. 2005

Base: Those Answering



Q15. How well has procurement delivered in terms of (benefit)—exceeded expectations, met expectations, failed to meet expectations?

Source: ANA, 2010

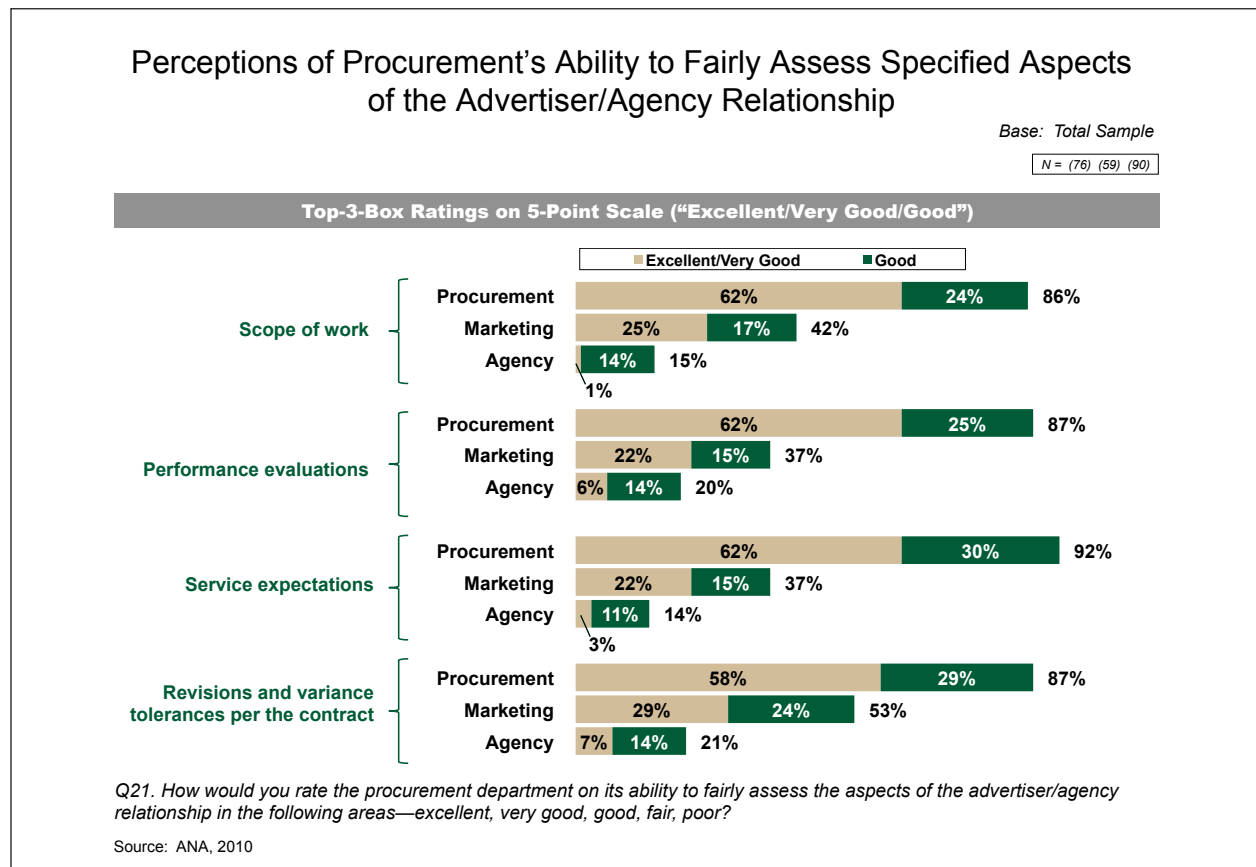
NOTE: May not add to 100% due to rounding  
Information for respondents in 2005 based on estimates

# Views on Procurement’s Ability to Assess the Client/Agency Relationship

As was observed with most measures in this survey, when it comes to perceptions of marketing procurement’s ability to fairly assess the key aspects of the client/agency relationship, the views of the three stakeholder groups are far apart.

Respondents were asked to rate four specific areas in terms of marketing procurement’s track record in making fair assessments. The areas were “scope of work,” “performance evaluations,” “service expectations,” and “revisions and variance tolerances per the contract.”

In general, the proportions of the three stakeholder groups scoring procurement as “excellent/very good/good” in each of the four areas were about nine-in-ten procurement professionals, four-in-ten marketers, and only two-in-ten agency executives.



# Views on How Procurement Perceives Value

For the most part, marketing procurement professionals feel they define value as “maximum growth and impact.” In direct opposition to this position, most marketers and virtually all agency executives lean toward the view that procurement defines value as “lowest cost.”

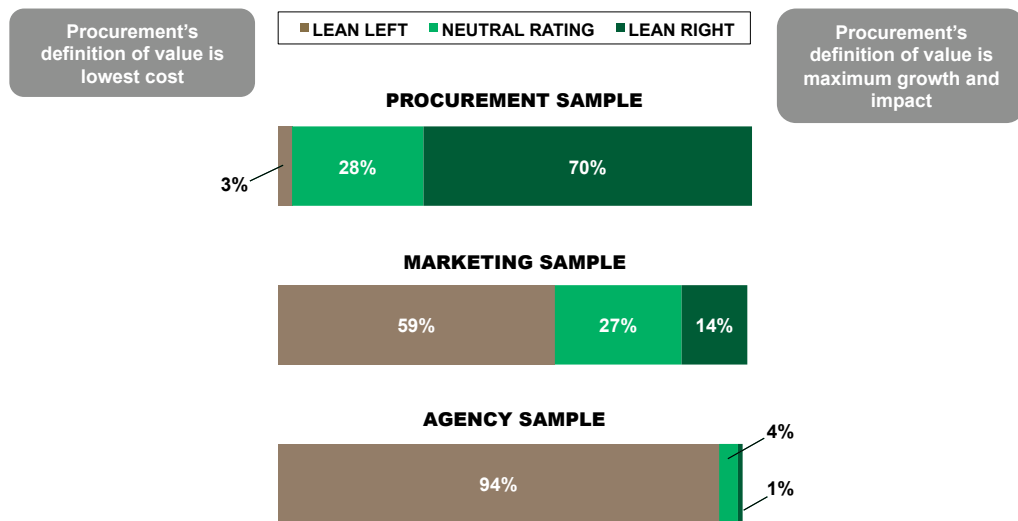
The more evolved organizations with strong marketing and procurement ties have moved beyond cost savings and toward top-line growth. If the procurement folks were seen by marketing and agencies as being able to add value to the top-line, and if procurement was presenting case studies about how they do that, the dynamic would change.

Jim Akers  
 Senior Director, WW Procurement Global Category Lead, Commercialization and Communications  
 Pfizer Inc.



## Perceptions of How Procurement Defines “Value”

Base: Total Sample  
 N = (76) (59) (90)



Q23. Please indicate where on the continuum below the procurement group stands in terms of its definition of what constitutes “value.”

Source: ANA, 2010

NOTE: May not add to 100% due to rounding

# Views on Whether Procurement Sees Marketing as an Expense or Investment

There is a huge disconnect between the three stakeholder groups on the question of whether procurement views the marketing function as an investment to be optimized or as an expense to be minimized.

- The vast majority of procurement professionals (84%) say they see marketing as an investment to be optimized.
- In contrast, marketing and especially agency respondents tilt toward the view that procurement thinks of marketing as an expense to be minimized.

I am struck by the disconnect between marketing and procurement. If the leadership at the company does not have an aligned goal that is well understood by both functions, there will be continued dysfunctional behavior. The success of these arrangements starts at the client.

Kim Kraus

*Director, Brand Building Strategic Sourcing*

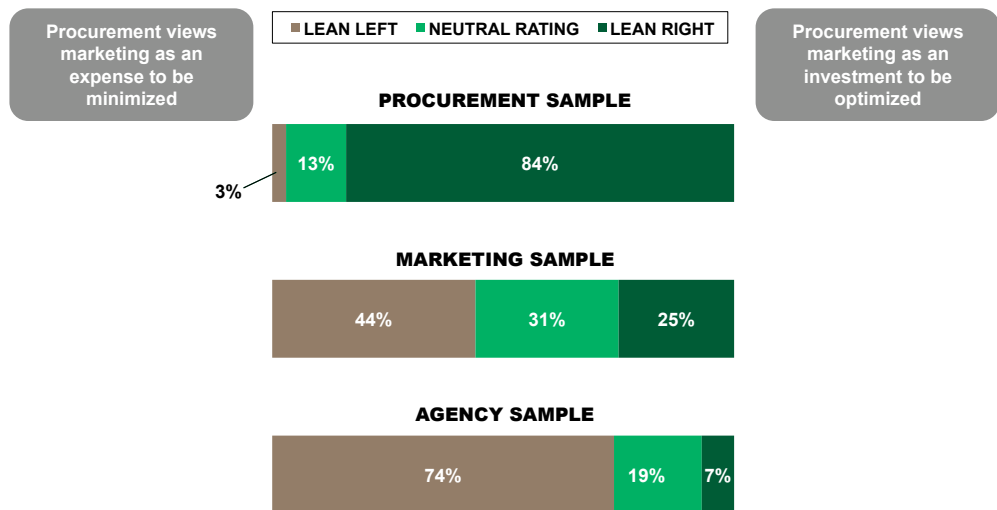
**The Procter & Gamble Company**



## Perceptions of How Procurement Views The Marketing Function

Base: Total Sample

N = (76) (59) (90)



Q24. Please indicate where on the continuum below the procurement group stands in terms of its view of the marketing function.

Source: ANA, 2010

NOTE: May not add to 100% due to rounding

# Views on Procurement's Relationships with Marketing and Agencies

Again, there is a huge disconnect between the three stakeholder groups on the question of whether procurement's interactions are collaborative or threatening.

- Almost every procurement professional surveyed (95%) saw themselves as collaborative, seeking win-win agreements.
- Among the marketers surveyed, only 44% leaned toward seeing procurement as collaborative, while 20% tilted toward seeing procurement as threatening.
- The great majority of agency executives (68%) leaned toward a perception of procurement as threatening, while the number seeing it as collaborative was negligible.

In my opinion, this perceived gap between stakeholders is perhaps the most troubling and one of the most critical opportunities for procurement to address. In order to evolve, procurement must focus some effort on changing their style away from being viewed as “threatening” and exerting unilateral demands during negotiations. Shifting the focus to building strong partnerships with marketing and agencies will ultimately lead to more productive relationships and better overall results in the long term.

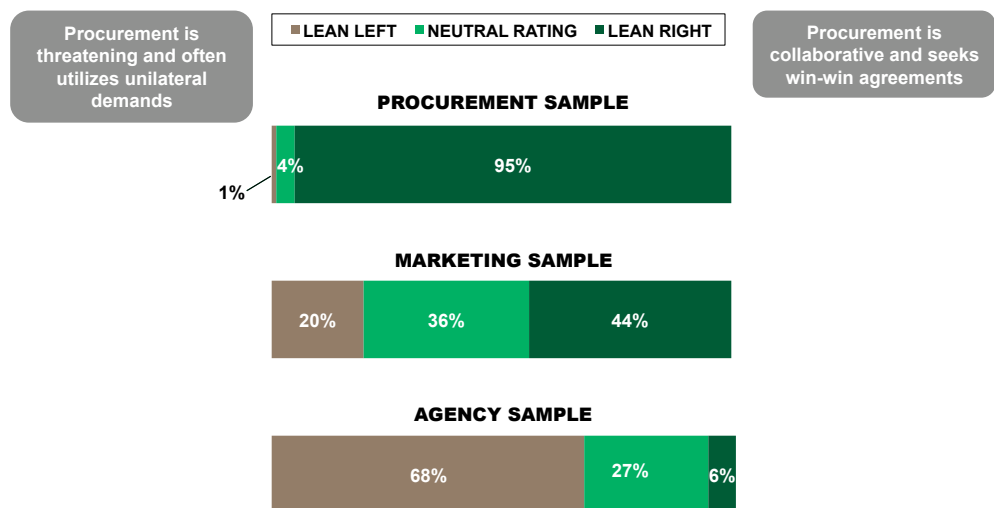
Lisa Figel  
 Group Category Manager, Agencies  
 Johnson & Johnson Consumer Companies



## Perceptions of How Procurement Works with Others

Base: Total Sample

N = (76) (59) (90)



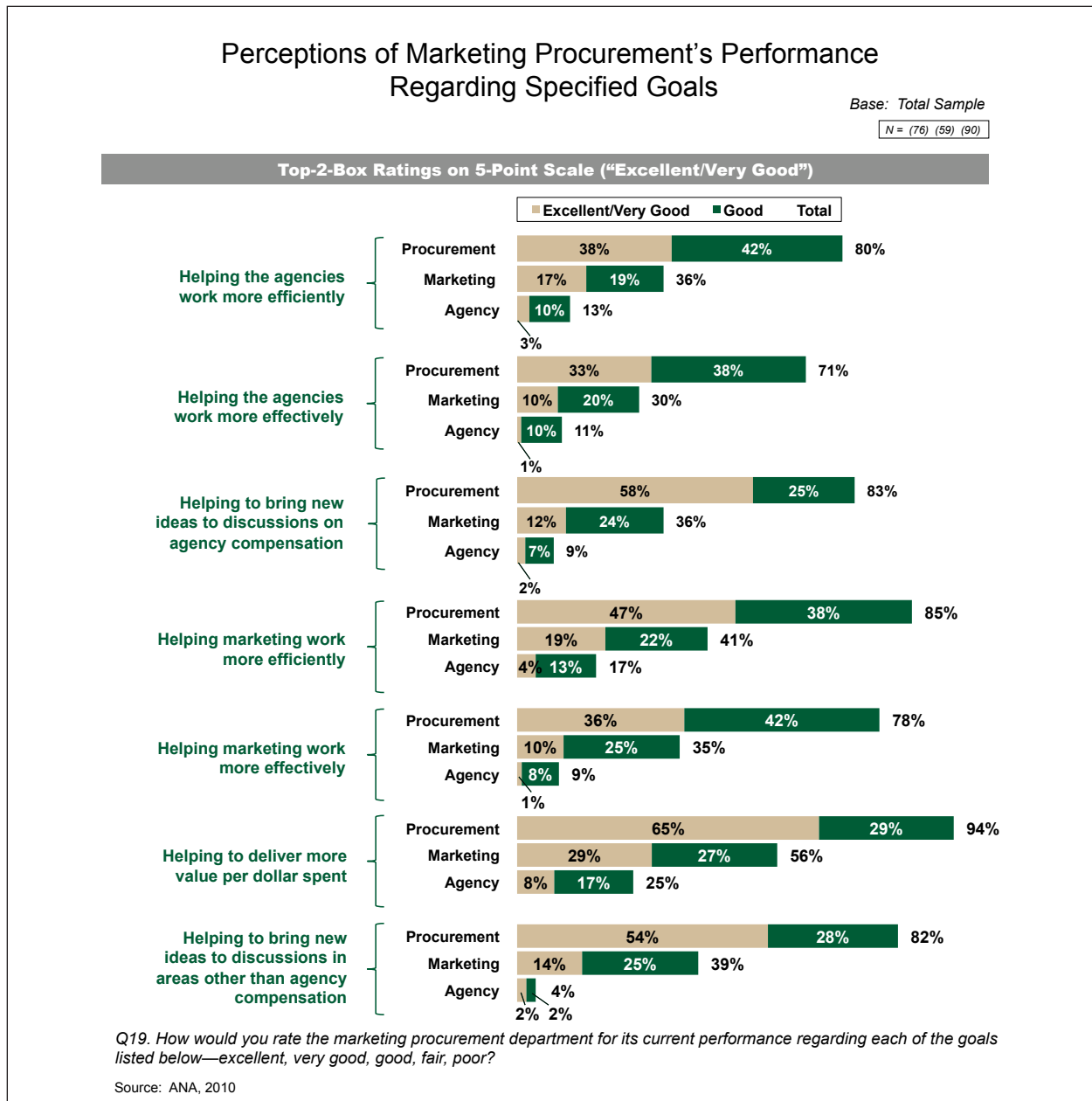
Q25. Please indicate where on the continuum below the procurement group stands in terms of its view of its interactions with marketing and the agency(s).

Source: ANA, 2010

NOTE: May not add to 100% due to rounding

# Views on How Well Procurement Meets Certain Goals

Respondents were asked to rate a number of specific goals in terms of marketing procurement's performance. In general, the proportions of the three stakeholder groups scoring procurement as "excellent/very good/good" on each of the goals were at least three-quarters of procurement professionals, one-third of marketers, and only about one-tenth of agency executives.



## Views on Positive Statements about Procurement

Respondents were presented with a list of positive statements about the marketing procurement function and asked about the extent to which they agreed or disagreed with each.

Agreement with almost every one of the positive characteristics of marketing procurement was very high among procurement professionals, much lower among marketers, and extremely low among agency respondents.

There are significant transparency issues between client procurement and both client marketing and marketing service agencies. Procurement has an opportunity to improve trust, enhance effectiveness, and facilitate collaboration by being more open and transparent in communicating their detailed goals, objectives, benchmarks, and metrics to both internal marketing colleagues and their key agency partners.



Nancy Hill  
CEO/President  
4A's

### Agreement with Statements About Marketing Procurement

Top-2-Box Ratings on 5-Point Scale ("Agree Completely/Somewhat")

	Procurement Sample	Marketing Sample	Agency Sample
<b>Base: Total Sample</b>	(76)	(59)	(90)
	%	%	%
Communicates openly and honestly with marketing	97	51	24
Understands the economic value of successful marketing activities	92	49	14
Is strategic	92	32	7
Has the support of client senior management	91	64	61
Is transparent with marketing in sharing objectives and goals regarding agency search	91	48	26
Is knowledgeable in advertising/marketing	90	36	14
Is transparent with marketing in sharing objectives and goals regarding compensation negotiations	88	54	29
Communicates openly and honestly with agencies	87	44	14
Shares key benchmarks and expectations regarding compensation negotiations with marketing	86	44	19
Shares criteria and weighting regarding agency search with marketing	86	41	22
Is transparent with agencies in sharing objectives and goals regarding compensation negotiations	82	34	22
Is transparent with agencies in sharing objectives and goals regarding agency search	74	41	14
Shares key benchmarks and expectations regarding compensation negotiations with agencies	74	32	18
Shares criteria and weighting regarding agency search with agencies	61	29	19

Q20. Please indicate the extent to which you agree or disagree that each of the following statements describes the characteristics of marketing procurement—agree completely, agree somewhat, neither agree nor disagree, disagree somewhat, disagree completely?

Source: ANA, 2010



## Views on Negative Statements about Procurement

Respondents were presented with a list of negative statements about the marketing procurement function and asked about the extent to which they agreed or disagreed with each.

Agreement with almost every one of the negative statements about marketing procurement was very low among procurement professionals, much higher among marketers, and near universal among agency respondents.

Agreement with Criticisms Of Marketing Procurement			
Top-2-Box Ratings on 5-Point Scale ("Agree Completely/Somewhat")			
	Procurement Sample	Marketing Sample	Agency Sample
<b>Base: Total Sample</b>	(76)	(59)	(90)
	%	%	%
There is a widespread lack of marketing experience among procurement people	38	66	96
Procurement is mandated with putting a premium on cost reduction	37	73	96
Procurement treats media as a commodity	30	68	72
Procurement often draws out financial and contract discussions	25	42	81
Procurement issued RFPs [in the agency search and selection process] are often outlandish [e.g., some with 300 questions, only 10 of which are related to marketing]	18	46	84
Procurement treats agency services as a commodity	16	59	91
Procurement executives want to purchase services for fees that are lower than the cost of what it takes to produce those services	15	56	79
Many procurement people would rather be buying equipment or commodities than marketing services	15	39	49
In procurement-led reviews, price often trumps the quality and innovation of the work presented	8	63	82
Procurement may take an RFP form used for sourcing manufacturing vendors or research and technology providers and use that same form for agencies	8	48	84
Media reviews are often little more than exercises in driving down prices at the behest of procurement executives	8	37	54
Procurement does not appreciate the creativity that agencies can provide	3	48	91
A procurement strategy (during agency searches and contract negotiations) is to isolate their own Marketing Department	3	9	59

*Q22. In recent months there has been an increased buzz in the industry regarding issues with procurement. A cover story in Advertising Age included all of the statements listed below. On the scale below, please indicate the extent to which you agree or disagree with each statement.*

Source: ANA, 2010

## Conclusion

The gaps between procurement/marketing and procurement/agencies are wide and dramatic. The procurement/marketing gaps are especially disconcerting—these people work for the same company and are supposed to be playing on the same team!

Agency gaps are wide, too, but perhaps not as wide as the survey results suggest. Agencies were asked to answer the survey either based on experience with a single client if the respondent deals primarily with one client that has active procurement involvement or based on the average/overall experience if working with multiple clients. But a handful of agency respondents told us that they answered the survey based on their worst client experiences to make more of a statement. Nonetheless, there is still substantial work to do in most procurement/agency relationships.

It's hoped that the results of this survey will be a wake-up call to procurement. While there are good marketing procurement people in the business, it's also apparent that there are many others whose behavior can only be categorized as bad and/or ugly. The marketing procurement industry must rise-up to elevate its craft as only then can its impact be maximized.

Bill Duggan  
*Group Executive Vice President*  
ANA



## Suggestions and Best Practices to Improve the Procurement/Marketing and Procurement/Agency Relationships

These suggestions and best practices fall under the broader categories of collaboration and professional development.

### Collaboration Best Practices

**Alignment with Leadership:** Understand why client leadership is staffing a marketing procurement group as well as the expectations of that leadership.

**Goals of Procurement and Marketing Must Be in Sync:** Marketing and procurement must have relevant, mutually agreed-upon goals and measures. Conflicting goals and priorities can lead to chaos. Marketing and procurement should agree on an approach that balances the business/financial challenges and the need for the best agency talent that results in a fee that appropriately supports the scope of work and required agency resources.

**Agree on the Definition of Value:** To some, value is maximum growth and impact; to others, it's lowest cost. There must be agreement between procurement and marketing (and marketing finance, if applicable) on how value is defined, and that agreement should be shared with agencies.

**Early Involvement of Procurement:** Procurement should be involved early in the process. Marketing should discuss desired goals at that early stage and share relevant information. Procurement should be engaged before suppliers are selected or begin work. Early involvement helps procurement understand the bigger picture and contributes to a spirit of collaboration and inclusiveness.

**Understand That Most Advertising Services Are Not Commodities:** Ideas are definitely not commodities as the difference between a superior idea and a common idea is likely to have a vastly different impact on business results. Agencies—at least the better ones—are not commodities as each agency has its own unique offering and cost structure.

### Professional Development Best Practices

**Marketing Education:** Procurement professionals can benefit from on-going marketing/advertising education to better understand marketing and the role of agencies. Similarly, marketing and advertising professionals can benefit from procurement education.

**Spend Time with Your Agencies:** Spending time with your agencies is important for two key reasons: it provides procurement with a clearer understanding of how agencies work (and is part of the marketing education noted previously), and it builds relationships. Consider an immersion where a procurement professional goes to work at an agency for an extended period and spends time with various departments.

**Find the Right People:** To succeed, the right people must be put in the roles. These are people with high “emotional intelligence,” who are energized by enabling others rather than getting all the credit and who truly respect the art and science of marketing/brand building. These are people who need to be comfortable building closer relationships with external parties, yet able to maintain objectivity. They need to be energized by work plans that are constantly changing as nothing is status quo in the world of marketing.

### ANA Initiatives to Improve the Procurement/Marketing and Procurement/Agency Relationships.

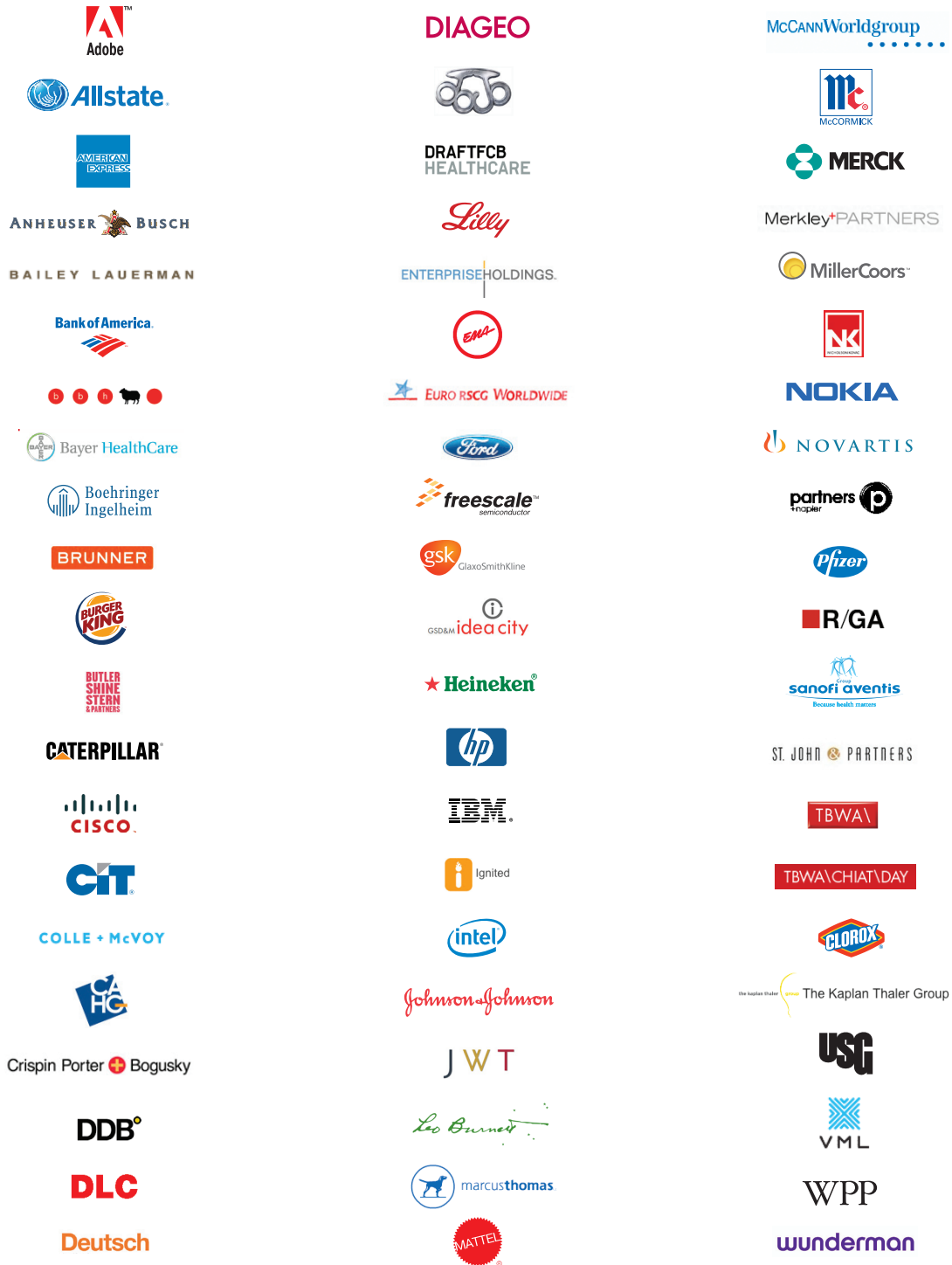
ANA has undertaken the following initiatives to help improve the procurement/marketing and procurement/-agency relationships:

**ANA Procurement Task Force:** A few years ago this was a formal working group whose objective was to advance the state of marketing procurement, but the group has been inactive more recently. The group will be relaunched with the goal of meeting regularly to address the issues identified in the survey. Agencies and appropriate outside consultants will be invited to contribute their perspective and thought leadership.

**ANA Procurement Mentoring Program:** This was suggested by Lisa Figel, group category manager, U.S. agency procurement at **Johnson & Johnson Consumer Companies**, during a panel at ANA’s 2010 Advertising Financial Management Conference. An advisory group of senior-level procurement professionals, like Lisa, at best-practice organizations, will be assembled and then be made available to counsel and mentor individuals at other companies in procurement groups whose roles are in the initial or developing stages. More information can be found at [www.ana.net/procurementmentoring](http://www.ana.net/procurementmentoring).

# About the Respondents

Participating companies that agreed to be identified:



## About the ANA

Founded in 1910, the ANA (Association of National Advertisers) leads the marketing community by providing its members with insights, collaboration, and advocacy. ANA's membership includes 400 companies with 9,000 brands that collectively spend over \$250 billion in marketing communications and advertising. The ANA strives to communicate marketing best practices, lead industry initiatives, influence industry practices, manage industry affairs, and advance, promote, and protect all advertisers and marketers.

For more information, visit [www.ana.net](http://www.ana.net).

## Additional ANA Resources

**ANA Advertising Financial Management Committee:** This group of client-side marketers meets quarterly to advance the knowledge of members and provide peer-to-peer networking. The committee explores efficiencies, cost savings, return on investment, and bringing better value to members' organizations. Participants have job responsibilities that are primarily marketing finance and procurement specialists. The [Advertising Financial Management Committee](#) meets in New York City, and there is a [West Coast chapter](#) that meets in California. More at [www.ana.net/committees](http://www.ana.net/committees).

**ANA Marketing Insights Center:** To find articles and presentations on a range of marketing topics, including procurement, visit [www.ana.net/michome](http://www.ana.net/michome).

**ANA Conferences:** The ANA helps the marketing community stay abreast of cutting-edge trends and best practices via a comprehensive calendar of national industry conferences and members only conferences. Find more information at <http://www.ana.net/events>.

**ANA Thought Leadership:** ANA surveys and Research Reports are based on topics identified by the ANA and its membership as critical issues and emerging trends that nearly all marketers face today. To access Research Reports, which allow you to tap into members-only research and perspective, please visit [www.ana.net/thoughtleadership](http://www.ana.net/thoughtleadership).

## Appendix A: Firmographics

Note: Tables in this section may not add to 100% due to rounding.

In which category of product or service does your organization primarily market?		
	Marketing Procurement/ Sourcing Sample	Marketing/Marketing Services Sample
<b>Base: Those Answering</b>	<b>%</b>	<b>%</b>
Apparel, Footwear	3	-
Automotive, Motorcycles	1	5
Beverage	4	7
Business & Professional Services	-	2
Computers & Technology	4	14
Consumer Durables	-	2
Consumer Electronics	3	-
Consumer Packaged Goods	9	9
Entertainment, Media, Sports	-	-
Financial Services - Banking	3	2
Financial Services - Brokerage	-	-
Financial Services - Credit Cards	4	7
Financial Services - Insurance	-	-
Food	4	5
Health & Beauty	6	-
Healthcare	10	7
Manufacturing, Industrial Goods & Services	1	-
Pharmaceuticals	3	7
Restaurants, Fast Food, Grocery Stores	3	5
Retail	26	7
Telecommunications	-	-
Tobacco	-	2
Travel, Transportation, Tourism, Hospitality	4	2
Other	4	7

**Is your company primarily B-to-C, B-to-B, or an about equal combination of both?**

	Marketing Procurement/ Sourcing Sample	Marketing/Marketing Services Sample
<b>Base: Those Answering</b>	%	%
Primarily B-to-B	19	20
Primarily B-to-C	50	42
About equal combination of both	31	38

**Which of the following best describes your organization's annual revenue?**

	Marketing Procurement/ Sourcing Sample	Marketing/Marketing Services Sample
<b>Base: Those Answering</b>	%	%
Less than \$1 million	-	-
\$1 million - \$10 million	-	3
\$10 million - \$50 million	-	-
\$50 million - \$100 million	2	-
\$100 million - \$250 million	-	-
\$250 million - \$500 million	-	3
\$500 million - \$1 billion	2	3
\$1 billion - \$5 billion	9	13
\$5 billion - \$10 billion	9	18
\$10 billion - \$25 billion	21	11
\$25 billion - \$50 billion	9	13
\$50 billion - \$100 billion	28	13
\$100 billion or more	22	24

**Which of the following best describes your organization's annual U.S. marketing and advertising budget?**

	Marketing Procurement/ Sourcing Sample	Marketing/Marketing Services Sample
<b>Base: Those Answering</b>	%	%
Less than \$250 thousand	-	3
\$250 thousand - \$500 thousand	-	3
\$500 thousand - \$750 thousand	2	-
\$750 thousand - \$1 million	-	-
\$1 million - \$5 million	-	3
\$5 million - \$15 million	2	3
\$15 million - \$30 million	-	6
\$30 million - \$50 million	-	6
\$50 million - \$100 million	2	9
\$100 million - \$200 million	8	15
\$200 million - \$500 million	27	15
\$500 million - \$1 billion	33	18
\$1 billion or more	25	21



What is your job level?		
	Marketing Procurement/ Sourcing Sample	Marketing/Marketing Services Sample
<b>Base: Those Answering</b>	<b>%</b>	<b>%</b>
CEO/President	-	-
Chief Marketing Officer	-	-
Executive Vice President	-	-
Senior Vice President	-	2
Vice President	3	14
Director	37	36
Brand or Product Manager	-	18
Assistant Brand or Product Manager	-	5
Associate Brand or Product Manager	-	-
Manager	32	23
Assistant Manager	2	-
Other	26	2

In what functional area do you currently work?	
	Marketing/Marketing Services Sample
<b>Base: Those Answering</b>	<b>%</b>
Executive	-
Marketing	76
Advertising	9
Brand Management	2
Communications	4
Product Management	-
Information Technology	-
Procurement/Sourcing	-
Sales	-
Strategy	2
Research	4
Other	2

How many years have you personally been working in marketing/advertising?	
	Marketing/Marketing Services Sample
<b>Base: Those Answering</b>	%
Less than one year	-
1 to less than 2 years	-
2 to less than 5 years	2
5 to less than 7 years	2
7 to less than 10 years	11
10 to less than 15 years	16
15 to less than 20 years	18
20 to less than 25 years	29
25 to less than 30 years	18
30 years or more	4
<b>Mean</b>	<b>18.9</b>

What is your gender?		
	Marketing Procurement/ Sourcing Sample	Marketing/Marketing Services Sample
<b>Base: Those Answering</b>	%	%
Male	52	48
Female	48	52

### What best describes your agency's primary service offering?

	Agency Sample
<b>Base: Those Answering</b>	<b>%</b>
General, full service advertising	72
Media services	11
Digital/interactive services	8
Direct response/CRM marketing services	2
Public relations	-
Other	6

### In what functional area do you currently work?

	Agency Sample
<b>Base: Those Answering</b>	<b>%</b>
Agency management	36
Account management	4
New business	12
Creative or production services	1
Finance or operations	44
Account planning or research	-
Media planning or buying	2
Other	-

# Appendix B: Questionnaire

## SCREENER QUESTIONS

SQ1. In which functional area of your company do you currently work?

- Marketing Procurement/Sourcing **[SKIP TO SECTION 1 (Q1) IN MAIN]**
- Marketing/Marketing Services **[SKIP TO SECTION 2 (Q4) IN MAIN]**
- Finance **[SKIP TO SECTION 2 (Q4) IN MAIN]**
- Agency **[CONTINUE WITH SCREEN WITH SQ2 TEXT]**
- Other Client (please specify title) \_\_\_\_\_ **[SKIP TO SECTION 2 (Q4) IN MAIN]**

### SQ2. ***A NOTE FOR AGENCY RESPONDENTS***

Please only complete this survey if you have significant or ongoing/regular interaction with client procurement or if client procurement has a material impact on your agency's servicing or prospecting activities or compensation arrangements.

If you deal primarily with one client that has an active procurement involvement, please formulate your response to this survey questionnaire based on your experience with and perspectives of that one client. However, If you deal with multiple clients that have an active procurement involvement with your business, please formulate your response to this survey questionnaire based on your average or overall experience with and perspectives of client procurement across all of your client arrangements.

Please check one answer:

- I have significant or ongoing/regular interaction with client procurement, or client procurement has a material impact on my agency's servicing or prospecting activities or compensation arrangements. **[SKIP TO SECTION 3 (Q13) IN MAIN QUESTIONNAIRE]**
- I DO NOT have significant or ongoing/regular interaction with client procurement NOR DOES client procurement have a material impact on my agency's servicing or prospecting activities or compensation arrangements. **[TERMINATE]**

## MAIN QUESTIONNAIRE

### SECTION 1: ASK ONLY OF THOSE WHO CHECKED "MARKETING PROCUREMENT/SOURCING" IN SQ1

1. How many years of experience do you personally have as a procurement professional?
  - Under 1 year
  - 1 year to under 3 years
  - 3 years to under 5 years
  - 5 years to under 10 years
  - 10 years to under 15 years
  - 15 years to under 20 years
  - 20 years to under 30 years
  - 30 years or more
  - Don't know/not sure
  
2. How many years of experience do you personally have as a marketing procurement professional?
  - Under 1 year
  - 1 year to under 3 years
  - 3 years to under 5 years
  - 5 years to under 10 years
  - 10 years to under 15 years
  - 15 years to under 20 years
  - 20 years to under 30 years
  - 30 years or more
  - Don't know/not sure

3. Which of the following positions best describes your professional background prior to taking on your current role in marketing procurement? Please select one response only.

- Procurement other than marketing **(SKIP TO Q4)**
- Marketing role and then moved into procurement **(ASK Q3a)**
- Finance role and then moved into procurement **(SKIP TO Q4)**
- Other (please specify) \_\_\_\_\_ **(SKIP TO Q4)**

3a. How many years of experience did you have in your marketing role before moving to procurement?

- Under 1 year
- 1 year to under 3 years
- 3 years to under 5 years
- 5 years to under 10 years
- 10 years to under 15 years
- 15 years to under 20 years
- 20 years to under 30 years
- 30 years or more
- Don't know/not sure

## SECTION 2: ASK EVERYONE EXCEPT THOSE WHO CHECKED "AGENCY" IN SQ1

4. How many years has a marketing procurement department been in existence within your organization?
- Under 1 year
  - 1 year to under 3 years
  - 3 years to under 5 years
  - 5 years to under 10 years
  - 10 years to under 15 years
  - 15 years to under 20 years
  - 20 years to under 30 years
  - 30 years or more
  - Don't know/not sure
5. In your organization, to which functional group (or groups) does marketing procurement report? Please select all that apply.
- Advertising, Marketing, and/or Marketing Communications
  - Finance or Accounting
  - Supply Chain Management or Strategic Sourcing
  - Operations
  - Corporate Services
  - Stand-Alone Purchasing or Procurement Group
  - Other groups (please specify) \_\_\_\_\_
  - Don't know/not sure
- 5a. If you need to further clarify your response to the previous question please do so in the space below. If you prefer not to comment please click NEXT.

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6. Which of the following procurement areas is your marketing procurement organization currently supporting? Please select all that apply.

- Contracts
- Agency/supplier compensation
- Agency/supplier selection
- Agency/supplier management
- Agency/supplier performance evaluation
- Agency/supplier diversity
- Marketing process improvement
- Scope of work development and resourcing
- Strategic planning
- Social responsibility
- Other areas (please specify) \_\_\_\_\_

6a. In addition to these procurement areas that your marketing procurement organization currently supports, what new areas is procurement likely to support in the future? Please write your answer in the space below. If you prefer not to comment please click NEXT.

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7. How would you rate procurement’s impact on the following areas?

	High	Medium	Low	Don't know/ not sure
Contracts				
Agency/supplier compensation				
Agency/supplier selection				
Agency/supplier management				
Agency/supplier performance evaluation				
Agency/supplier diversity				
Marketing process improvement				
Scope of work development and resourcing				
Strategic planning				
Social responsibility				

8. Please rank the top three areas in which procurement has had the greatest positive impact.

	First ranked	Second ranked	Third ranked
Contracts			
Agency/supplier compensation			
Agency/supplier selection			
Agency/supplier management			
Agency/supplier performance evaluation			
Agency/supplier diversity			
Marketing process improvement			
Scope of work development and resourcing			
Strategic planning			
Social responsibility			
Other areas (please specify) _____			

9. In which marketing communications disciplines does marketing procurement play a role or have responsibilities within your organization? Please select all that apply.

- Production for traditional media (TV, radio, print, OOH)
- Production for digital media
- Media planning
- Media buying
- Public relations
- Relationship marketing/CRM
- Marketing research
- Sponsorship and event marketing
- Promotions
- Direct marketing
- Digital marketing
- Interactive advertising (e.g., usability studies, website architecture/design)
- Licensing
- Branding
- Strategy and ideation
- Other disciplines (please specify) \_\_\_\_\_

9a. Besides these foregoing marketing communications disciplines, in what new areas is procurement likely to get involved in the future? Please write your answer in the space below. If you prefer not to comment please click NEXT.

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10. How would you rate procurement's impact on the following disciplines?

	High	Medium	Low	Don't know/ not sure
Production for traditional media (TV, radio, print, OOH)				
Production for digital media				
Media planning				
Media buying				
Public relations				
Relationship marketing/CRM				
Marketing research				
Sponsorship and event marketing				
Promotions				
Direct marketing				
Digital marketing				
Interactive advertising (e.g., usability studies, website architecture/design)				
Licensing				
Branding				
Strategy and ideation				

11. Please rank the top three marketing communications disciplines in which procurement has had the greatest positive impact.

	First ranked	Second ranked	Third ranked
Production for traditional media (TV, radio, print, OOH)			
Production for digital media			
Media planning			
Media buying			
Public relations			
Relationship marketing/CRM			
Marketing research			
Sponsorship and event marketing			
Promotions			
Direct marketing			
Digital marketing			
Interactive advertising (e.g., usability studies, website architecture/design)			
Licensing			
Branding			
Strategy and ideation			
Other discipline (please specify) _____			

12. How would you describe marketing procurement’s role and responsibilities within your organization? Please select only one item.

- Advanced: has been around for many years and has well-defined structure and uses new/cutting edge technologies and services
- Established: is firmly entrenched within the organization across all functional areas
- Developing: has a foundation from which to grow across the organization
- Initial: is just beginning to gain momentum and acceptance within the organization
- Don't know/not sure

### SECTION 3: ASK EVERYONE

13. Which of the following statements best describes the relationship between marketing procurement and the marketing department?
- Marketing procurement takes the proactive lead in providing services to the marketing department, and the marketing department comes to procurement for advice, counsel, and directions.
  - Marketing procurement participates with the marketing department, providing insights and direction and having a “seat at the table” for discussions.
  - Marketing procurement follows the direction and lead of the marketing department, providing its services on an “as requested” basis.
  - None of the above/does not apply
14. Overall, do you feel that the client’s marketing organization sees marketing procurement as a critical member of the marketing function? Please answer on a scale from 0 to 10, where a “0” means “not at all at critical” and a “10” means “extremely critical.”
- 0 - Not at all critical
  - 1
  - 2
  - 3
  - 4
  - 5
  - 6
  - 7
  - 8
  - 9
  - 10 - Extremely critical
  - Don't know/not sure

15. How well has procurement delivered in terms of:

	Exceeded expectations	Met expectations	Failed to meet expectations	Don't know/not sure
Relationship management/stewardship				
Cost savings				
Process improvements				

16. How would you describe the level of procurement's involvement with marketing?

- Too little
- Too much
- About right
- Don't know/not sure

17. How would you describe the level of procurement's involvement with the agency(s)?

- Too little
- Too much
- About right
- Don't know/not sure

18. How would describe the health of the relationships between procurement, marketing, and the agency(s).

	Extremely healthy	Very healthy	Somewhat healthy	Not too healthy	Not at all healthy	Don't know/not sure
The relationship between procurement and marketing						
The relationship between procurement and the agency(s)						
The relationship between marketing and the agency(s)						

19. How would you rate the marketing procurement department for its current performance regarding each of the goals listed below?

	Excellent	Very good	Good	Fair	Poor	Don't know/ not sure
Helping marketing work more efficiently.						
Helping the agency(s) work more efficiently.						
Helping marketing work more effectively.						
Helping the agency(s) work more effectively.						
Helping to deliver more value per dollar spent.						
Helping to bring new ideas to discussions on agency compensation.						
Helping to bring new ideas to discussions in areas other than agency compensation.						



20. Using the scale below, please indicate the extent to which you agree or disagree that each of the following statements describes the characteristics of marketing procurement.

	Agree completely	Agree somewhat	Neither agree nor disagree	Disagree somewhat	Disagree completely	Don't know/not sure
Procurement is strategic.						
Procurement is knowledgeable in advertising/marketing.						
Procurement has the support of client senior management.						
Procurement understands the economic value of successful marketing activities.						
Procurement is transparent with marketing in sharing objectives and goals regarding compensation negotiations.						
Procurement is transparent with agencies in sharing objectives and goals regarding compensation negotiations.						
Procurement is transparent with marketing in sharing objectives and goals regarding agency search.						
Procurement is transparent with agencies in sharing objectives and goals regarding agency search.						
Procurement shares key benchmarks and expectations regarding compensation negotiations with marketing.						
Procurement shares key benchmarks and expectations regarding compensation negotiations with agencies.						
Procurement shares criteria and weighting regarding agency search with marketing.						
Procurement shares criteria and weighting regarding agency search with agencies.						
Procurement communicates openly and honestly with marketing.						
Procurement communicates openly and honestly with agencies.						

21. How would rate the procurement department on its ability to fairly assess the aspects of the advertiser/agency relationship in the following areas?

	Excellent	Very good	Good	Fair	Poor	Don't know/ not sure
Scope of work						
Performance evaluations						
Service expectations						
Revision and variance tolerances per the contract						

22. In recent months there has been an increased buzz in the industry regarding issues with procurement. **A cover story in *Advertising Age* included all of the statements listed below.** On the scale below, please indicate the extent to which you agree or disagree with each statement.

	Agree completely	Agree somewhat	Neither agree nor disagree	Disagree somewhat	Disagree completely	Don't know/not sure
Procurement executives want to purchase services for fees that are lower than the cost of what it takes to produce those services.						
Procurement treats media as a commodity.						
Procurement often “draws out” financial and contract discussions.						
In procurement-led reviews, price often trumps the quality and innovation of the work presented.						
Procurement treats agency services as a commodity.						
Procurement issued RFPs (in the agency search and selection process) are often “outlandish”(e.g., some with 300 questions, only 10 of which are related to marketing).						
Procurement may take an RFP form used for sourcing manufacturing vendors or research and technology providers and use that same form for agencies.						
A procurement strategy (during agency searches and contract negotiations) is to isolate their own marketing department.						
Media reviews are often little more than exercises in driving down prices at the behest of procurement executives.						
Procurement does not appreciate the creativity that agencies can provide.						
There is a widespread lack of marketing experience among procurement people.						
Many procurement people would rather be buying equipment or commodities than marketing services.						
Procurement is mandated with putting a premium on cost reduction.						

23. Please indicate where on the continuum below the procurement group stands in terms of its definition of what constitutes “value.”

Procurement’s definition of value is lowest cost.	1	2	3	4	5	Procurement’s definition of value is maximum growth and impact.
	[ ]	[ ]	[ ]	[ ]	[ ]	

24. Please indicate where on the continuum below the procurement group stands in terms of its view of the marketing function.

Procurement views marketing as an expense to be minimized.	1	2	3	4	5	Procurement view marketing as an investment to be optimized.
	[ ]	[ ]	[ ]	[ ]	[ ]	

25. Please indicate where on the continuum below the procurement group stands in terms of its view of its interactions with marketing and the agency(s).

Procurement is threatening and often utilizes unilateral demands.	1	2	3	4	5	Procurement is collaborative and seeks win-win agreements.
	[ ]	[ ]	[ ]	[ ]	[ ]	

**PN: ASK Q26 ONLY OF THOSE WHO CHECKED “AGENCY” IN SQ1**

26. What could procurement do differently to improve the agency/procurement relationship?  
Please write your thoughts in the space below. If you prefer not to comment please click NEXT.

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**PN: ASK Q27 AND Q28 ONLY OF THOSE WHO CHECKED “MARKETING PROCUREMENT/SOURCING” IN SQ1**

27. What could marketing do differently to improve the marketing/procurement relationship?  
Please write your thoughts in the space below. If you prefer not to comment please click NEXT.

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28. What could the agency(s) do differently to improve the agency/procurement relationship?  
Please write your thoughts in the space below. If you prefer not to comment please click NEXT.

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**PN: ASK Q29 ONLY OF THOSE WHO DID NOT CHECK “MARKETING PROCUREMENT/SOURCING” OR “AGENCY” IN SQ1**

29. What could procurement do differently to improve the marketing/procurement relationship?  
Please write your thoughts in the space below. If you prefer not to comment please click NEXT.

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**ASK EVERYONE**

30. If you were to define a “best in class” marketing procurement organization, what are the key elements that you feel would be essential to be “best in class?” Please write your thoughts in the space below. If you prefer not to comment please click NEXT.

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31. When we publish the results of this survey, can we identify your company as a participant? (It may provide value to you and other respondents to know which companies participated. All individual responses will be kept completely confidential.) If yes, please provide your company name below. Otherwise click NEXT.

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32. Would you be willing to be interviewed by *ANA Magazine* on your responses to this survey? If yes, please provide your e-mail address below. Otherwise click NEXT.

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**DO NOT ASK OF THOSE WHO CHECKED “AGENCY” IN SQ1.**

33. The ANA is creating a collection of marketing organizational charts so members can share best practices. If you would like to participate by submitting your marketing organizational chart please provide your e-mail address below, and we will follow up with you. Your company name does not need to be identified. If you do not want to participate, click NEXT.

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