

These seven agency search principles were developed by experienced client and agency representatives on the [CMA's Brand Strategy Council](#) and added to the [CMA's Code of Ethics & Standards of Practice](#) in May 2019.

Their over-arching goal was to be a neutral and balanced voice, working in the interest of the Canadian industry, without agency or client bias. It was not the intention of the Council or the CMA to create an exhaustive list of principles. Rather, the principles are tightly focused on key pain points, from both client and agency perspectives. For example, the first two principles reflect two of the most important pieces of information that are, surprisingly, missing from many RFPs.

The seven principles set the tone for a fair, respectful process in these key areas: information in a brief, deliverables required, intellectual property and communication. They are an easy-access checklist for avoiding many of the key problems that arise in searches.

The CMA has created a toolkit with practical insights to address different aspects and types of searches. The [CMA Agency Search Toolkit](#) includes detailed [explanation of the principles](#), guidance on what to include in an RFP/procurement brief, and advice specific to searches for the not-for-profit sector and for PR and media services. These tools will be released on our Member portal over the summer and the CMA Agency Search Toolkit will be refined and expanded on an ongoing basis. The CMA encourages members to consult all these tools to optimize any specific search you are embarking on.

AGENCY SEARCH PRINCIPLES

Principle 1: State the Contract Value

Contract Value: RFPs should always state the approximate size of the assignment. The RFP should clearly state if the amount is an estimate and if it is subject to change.

Principle 2: Identify Members of the Client Search Committee

Client Search Committee: RFPs should include the names and roles of the individuals who will evaluate the submissions and presentations, as well as any designated client contacts.

Principle 3: Seek Appropriate Financial Disclosure

Financial Disclosure: It is appropriate to request information pertaining to total agency revenue, current client list or certification from an accountant. It is never appropriate to require full financial disclosure, including margins.

Principle 4: Avoid or Limit Speculative Work

Speculative work: The CMA discourages requests for speculative creative or strategic work during an RFP process.

In cases where agencies are asked to work on a client's current, real world challenges during the RFP process:

- a) The brief should always be limited to one aspect of the challenge, not the entire challenge.

- b) Agencies and clients should always sign non-disclosure and non-use agreements.
- c) If the client wishes to make use of speculative work, the parties should first come to an agreement on reasonable compensation.

Principle 5: Manage Communication During the RFP Process

Communication: Agencies must not communicate with people in the client organization that are not specifically named in the RFP as a designated contact.

Principle 6: Formally and Promptly Notify Non-Winning Agencies

Search Outcome: Non-winning agencies should be formally notified in writing within one week of the winning agency being advised of its success.

Principle 7: Debrief Non-Winning Agencies

Debriefing: Non-winning agencies should be debriefed by the most senior decision-maker of the client search committee or by a senior member of the Marketing team.