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Institute of Advertising
Practitioners in Ireland



SELECTING AND APPOINTING AN AGENCY FOR A WEB DEVELOPMENT OR DIGITAL BRAND PROJECT

While there are similarities between how to conduct a good pitch process for advertising and a good pitch process for a web development project, there are also a number of differences that are worth taking account of.

Now more than ever, the way a brand expresses itself in digital channels and how it connects and services consumers online is central to business strategy and success. As a result, web development and digital brand projects are no longer viewed as tactical or just a production requirement. Brands are putting an increasing amount of time and effort into finding the right agency to deliver for this important aspect of their business.

We aim to pose and answer a number of key questions commonly asked and set out guidelines that will foster more beneficial client agency relationships for digital projects.

WHY SHOULD I APPOINT AN AGENCY FOR A WEB DEVELOPMENT OR DIGITAL BRANDING PROJECT?

There may be a number of reasons for wanting to appoint an agency for a web development or digital brand project.

- The current version of the website is no longer fit for purpose – the technology or design is obsolete or no longer able to deliver on your requirements
- There has been a significant change in the brand or the business that requires a stronger digital proposition than you currently have
- You are a new brand and business in the market that needs to develop a credible proposition across digital channels from the very outset

HOW LONG SHOULD I ALLOW FOR THE PROCESS?

The requirements of a web development or digital brand project can vary greatly – from a relatively straightforward brand brochure or website to a very complex e-commerce solution. Regardless of scale and scope, the web or digital asset that you are creating or updating should be future-facing as it is something that is likely to be a part of your business and brand for a number of years.

The duration of the project itself may last several months and become an ongoing commitment for both the brand and the agency. Therefore we strongly advise giving the right amount of time to finding the right web development partner.

For a full web development project a full 4-6 weeks should be allowed for agencies to formulate a robust and focused response to how they propose to deliver on your specific requirements.

What's the best process to follow?

The web development requirements of a brand differ from advertising or communication requirements in a number of ways

- They are likely to be ongoing and longer term, not campaign based

- The majority of the discovery and definition work involved in a website development project takes place after an agency has been appointed and in close collaboration with the brand
- A web development project may involve a greater number of stakeholders, or a different set of stakeholders than would typically be involved in an advertising pitch process

A web development project requires very close collaboration between agency and multiple aspects within the brand and often requires access to operational aspects of the business. A standard pitch process (where an agency brief results in a definitive response and recommendation) may not necessarily be the best approach.

A useful framework to consider is as follows:

Step 1: Defining the project and agency expertise

Issue an initial project brief and invite expressions of interest from agencies

- Consider asking agencies to outline their initial understanding of the project, the relevant skillsets and areas of expertise they can bring to the project and relevant examples of similar projects delivered

Step 2: Pre Project Discovery

Based on the suitability of skillsets and experience, draw up a shortlist of agencies (we recommend a maximum of 6 agencies) with which to conduct a well structured project workshop. This session is similar to a chemistry session but will allow both agency and brand to delve deeper into the specific understanding of the project and what is required on both sides. This will also be useful in helping everyone determine if they can work together and further tease out the requirements of the project to enhance the final project brief.

Step 3 – Initial Project Response

Asking a short list of a maximum of 3 agencies to submit an initial strategic response and outline their methodology and resource to deliver the project. At this stage the scope of the project should be much clearer and the agency should have enough understanding of the project requirements to also propose outline costs of the project.

This final phase is likely to also benefit from a refined brief, informed by the discussions with agencies in Step 1 and Step 2.

The benefit of this phased and collaborative approach to pitching for web development of digital brand work are as follows:

- It allows the client to determine if the agencies they are asking to submit proposals have the specific skill sets required to deliver the finished project.
- It allows agencies themselves to determine early on if they have the resource to adequately deliver the project and if not, explore potential partnerships with other partners that can bring the skill sets required. This can avoid agencies that don't have the required expertise having to pitch for projects they can't realistically deliver on.
- Avoids agencies recommending designs or approaches for the project that might be premature before working closely with the brand and business to identify best approach

Structuring the project

Based on the initial pre-discovery phase a brand might identify that it's better to break the project down into component parts and encourage different providers to collaborate on a joint solution to a brief. Areas such as e-commerce, digital branding, digital communications and user experience require specialist skills sets which may not all reside in one particular agency. In this case, it makes sense to encourage relevant parties that have these areas of expertise to work together. By indicating the priority skill sets you believe is required to deliver on a particular project will help both you and agencies decide if the project is the right fit and which aspect should lead the project.

WHAT INFORMATION SHOULD I PROVIDE AGENCIES TO HELP THEM UNDERSTAND MY REQUIREMENTS?

As with the advertising pitch process, the brief should give as much clarity and insight into your brand and business objectives as possible.

The more information you can provide the agencies during the process, the better the responses will be. The digital assets you create and own are likely to be a central part of both your business and brand so it makes sense to be clear about what your business and brand objectives are.

Where possible provide access to important data from your current Analytics or other on-site measurement tools as well as any research that will help the agency understand the wider brand and business context. Clear indication of target consumer / user or end user requirement should also be given if known.

As with the advertising pitch process we would recommend that both the agency and client sign a non-disclosure agreement so that all parties feel confident to exchange useful information.

WHAT IS REALISTIC TO ASK FOR IN A WEB DEVELOPMENT PITCH?

Consider your budget

It's important that a clear budget is given for the project. Time should be given to researching what scope your available budget is likely to allow, bearing in mind that web development can be time and resource intensive and involve ongoing service and third party technology costs.

If the project is likely to be less than €25,000 we do not recommend running a full pitch process. A focused assessment of the credentials, resource and examples of past work along with a well structured discovery session to determine the agency's understanding of your requirements is likely to be more beneficial to you and more efficient for all involved.

When making budget provisions for a web project it's also advisable to allocate sufficient resources for the best hosting environment possible. Make provision for ongoing support and maintenance of the website and hosting technology.

Designs and creative work

Visual designs and layouts are an output of the discovery, scoping and definition process, borne out of intrinsic understanding of the brand, the business and the optimum user experience. They are not an element that can be second guessed or devised as part of an agency selection process.

Where the design credentials of an agency need to be evaluated it is always better to ask for examples of finished work from previous web design and development projects that the agency has delivered.

Be open to collaboration between pitching agencies

Very often web development projects require close collaboration between a number of groups of people with specialist skill-sets and areas of expertise. These may be within the clients' business and the agencies or it may involve an agency partnering with other specialist providers to deliver on a particular project. This is indicative of the complex nature of digital and positive collaboration between specialist teams should be encouraged.

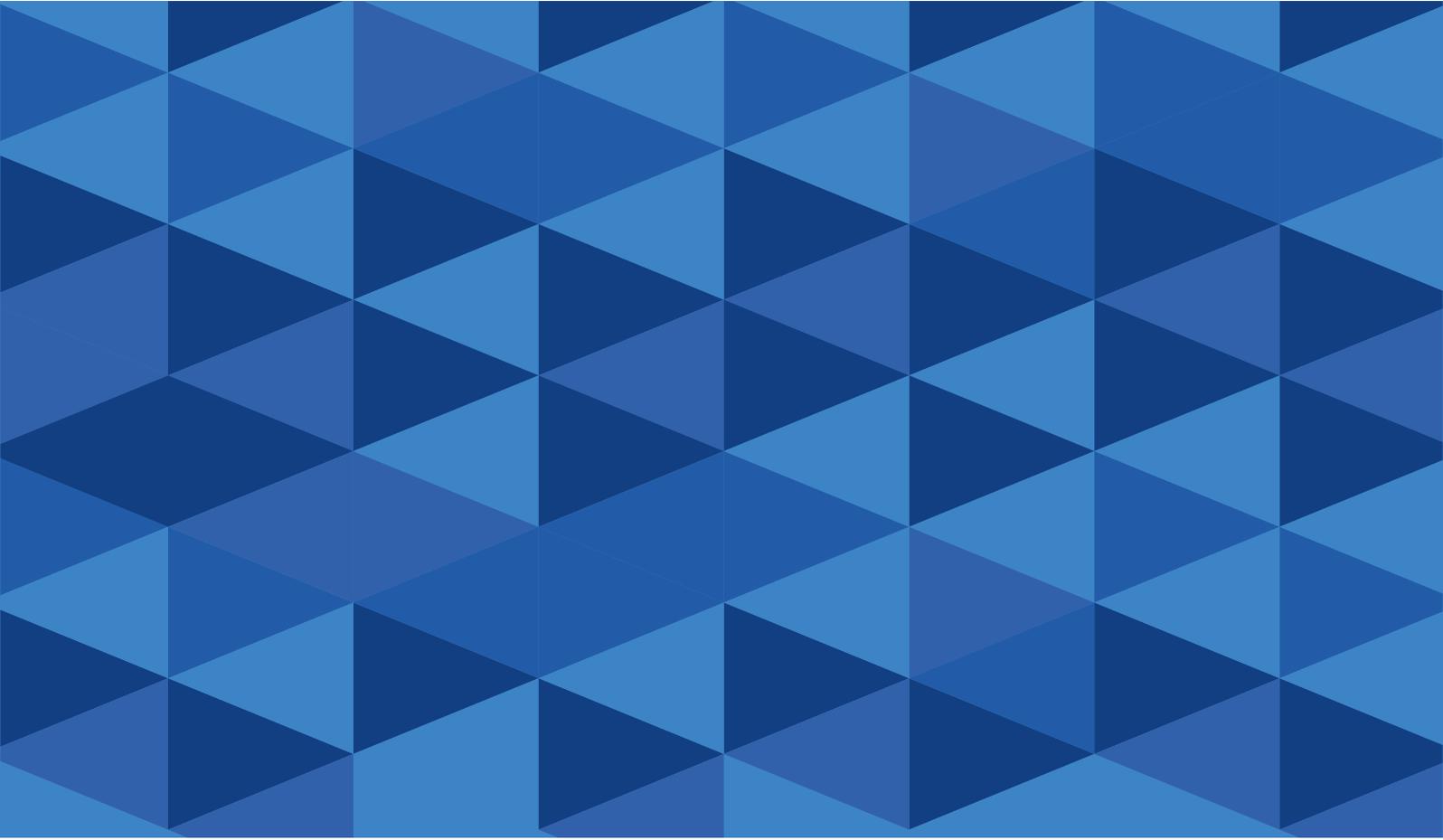
Who should I include in the pitch process?

Your owned digital assets (websites, mobile apps, online service platforms, eCRM, digital brand guidelines) are likely to be connected closely to both your brand's communications and business operations. We recommend involving the most relevant people from your organization in the pitch process – marketing teams and customer experience and information technology teams. This will allow the different functions in the business to input into the process to help the agencies participating in the pitch to fully understand specific internal stakeholder requirements for the project.

Not only should the most relevant people in the business with digital expertise be involved in the process, they should also be considered as important in helping define the scope and requirements of the brief that the agencies are being asked to respond to.

CONCLUSION

All brands today exist in a digital world. How they connect with consumers in digital channels is key to their future business success and growth. Agencies play an important role in helping brands define their digital future and conducting a successful web pitch process is one of the best ways to foster close agency / brand relationships to allow this to happen.



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