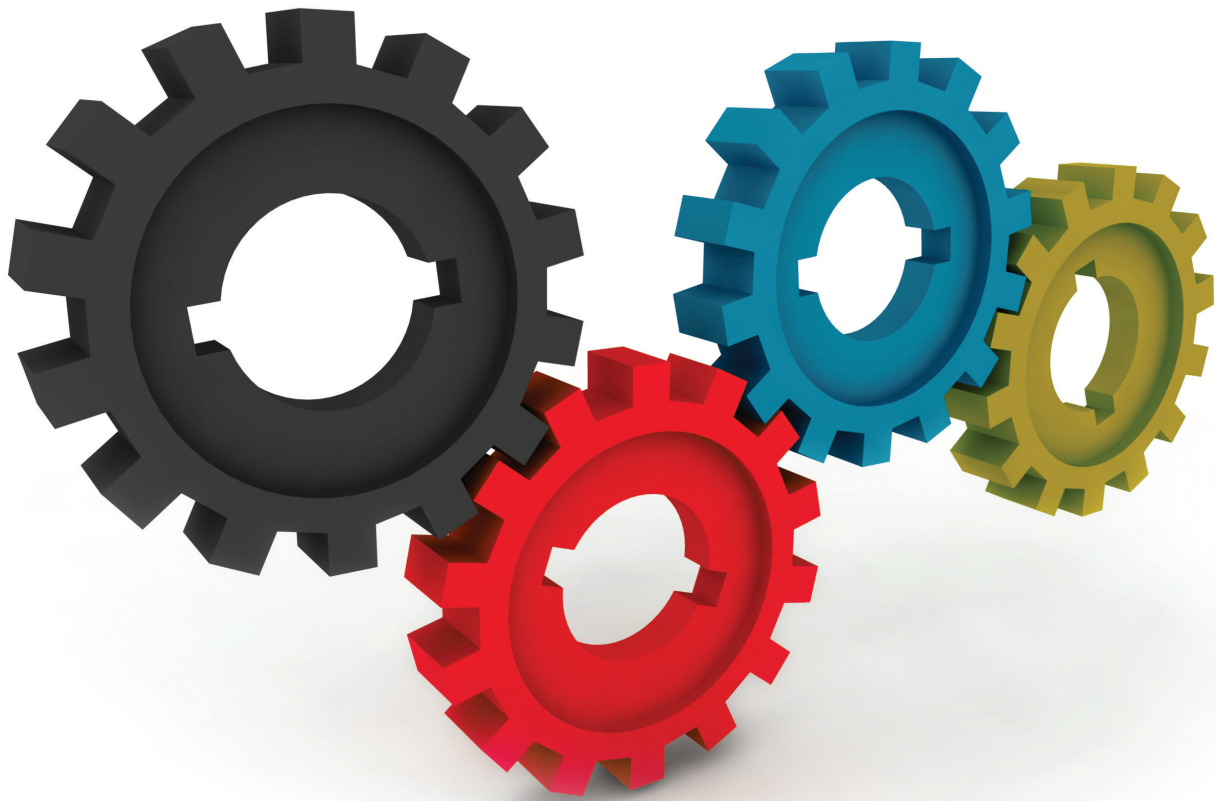


The Public Relations Procurement Toolkit

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Module 6: Good Housekeeping

This is one of a series of modules that together comprise the PR Procurement Toolkit – a joint initiative of the Chartered Institute of Public Relations (CIPR), Public Relations Consultants Association (PRCA), Central Office of Information (COI) and the Chartered Institute of Purchasing and Supply (CIPS).

The Toolkit as a whole is designed to help clients of the PR profession – in functions including Marketing and Procurement – and their suppliers, including agencies and other service providers, to work together to maximise the value delivered by PR practitioners and PR activity. The modules within the Toolkit are independent but interlinked, each covering a specific stage of the client/supplier relationship.

Once both client and agency have established a full and mutual understanding of what is expected by and from each party, and formalised this through tools such as the Contract and Statements of Work, a few 'good housekeeping' processes will help to ensure that unmet expectations are addressed before they become a cause for concern.

The emphasis must be on simplicity and pragmatism: neither client nor agency should impose or accept processes or measures that are too complex or time-consuming, or which serve no practical purpose. A few examples of good practice are set out below.

Reports

Few client/agency engagements require more than a weekly update covering:

- 'actions taken this week, actions to be taken last week' – which will seldom need to be more than a page or two of bullet points. Actions should be allocated to a named person rather than to 'agency' or 'client'
- a monthly progress report or project report, outlining performance against key objectives and any significant strategic or tactical issues
- a monthly or quarterly budget report, outlining the allocated budget and the sums disbursed, committed and uncommitted
- a contact report, issued within 24 hours of any significant meeting or phone call.

However, it is essential that such reports as may have been agreed are undertaken as a formal discipline, in a consistent format. If these basic account management disciplines begin to slip – being replaced with a quick chat, or an informal email – then performance will also, almost inevitably, begin to slip, leading to confusion and waste.

Service Level Agreements

Important aspects of the agency's service can be enshrined in a simple service level agreement. However, it is acceptable, even advisable, that the agency also imposes some service terms on the client. For example, while the client might specify that named, senior agency staff must be available by phone within two hours at any time of day or night, or that contact reports must be issued within 24 hours of a meeting, the agency might specify that comments or approvals for copy submitted for clearance are expected within 48 hours, or that once committed to by the client, engagements between the client and key media contacts may not be cancelled or delayed without exceptional reason.

Two-way Review

Both parties should conduct a regular, two-way review of the client/agency relationship and the value it is delivering. This should take place annually as a minimum, and ideally, six-monthly. This is particularly important with new relationships.

The review should be structured to generate open, honest and constructive comments, which can be acted on as necessary by both the client team and the agency team. It should not be regarded as either a chore or an ordeal, but as a valuable learning process. Some of the areas that can usefully be covered include:

Topic	Discussion points
Induction and expectations	What was the team expecting in terms of inputs and outputs to and from the other party – for example, information, training, introductions, industry background? What outcomes were expected from this induction process?
Delivery	What was actually delivered in terms of inputs and outputs to and from the other party? What outcomes were actually achieved?
Constraints influenced by the other party	What constraints were encountered which could have been influenced by the other party – for example, slow approval processes, or non-availability of senior staff at key times?
Constraints not influenced by the other party	What constraints were encountered which could not be influenced by the other party – for example, significant changes in corporate strategy, deferred product launches or significant technological developments?
Solutions	What can we do to ameliorate any current or foreseeable constraints? What plans or processes need to be changed to respond to the new circumstances? Who will do what to develop and enable these solutions?
Opportunities	What opportunities are there in the next 6 months, as a result of new ideas, capacity or capability from either client or agency, or from factors outside the client/agency team and their relationship? Who will do what to seize these opportunities?