

Modernizing the

RFP



*From Request to
Proposal*



*To Request to
Partnership*



When clients seek out a new agency, they are looking for more than just its capabilities and offerings. Ultimately, they choose their next agency based on its people, philosophies, and potential for partnership. Over the years, I've prided myself on being the best agency partner possible, guiding potential clients and procurement teams through a compelling narrative while supporting them in making educated, meaningful business decisions. This approach has led to numerous new business wins for our agency, and more importantly, client relationships that have lasted for decades.

If there's one thing I've learned, it's that no two new business pitches are the same. Each presents a unique set of challenges, opportunities, and rewards. Ironically, while the pitches vary greatly, the process companies use to find a new agency has remained surprisingly standardized.

The *Changing Role* of RFPs

An RFP (request for proposal) has long been the primary method businesses use to evaluate agencies. It enables companies to compare options side by side, facilitating the selection of the best fit. For decades, agencies have known how to respond to RFPs to showcase their unique talents, and an agency like ours typically responds to about 40 RFPs a year.

However, over the last several years, the landscape has shifted. We at Omnicom Commerce have observed significant restructuring in how major corporations align their Marketing and Sales teams. Companies are streamlining operations to become more agile, merging previously separate functions to create integrated, cross-functional teams focused on both customer needs and market opportunities. McKinsey has highlighted the growing adoption of agile teams that cut across traditional departmental lines, integrating Marketing and Sales to form faster, more responsive organizations. Brands are realizing that a united approach—leveraging marketing insights and sales execution—is crucial in an evolving marketplace.

Yet, despite these organizational shifts, many companies have been slow to adapt their agency search processes. While Marketing and Sales have grown closer, the RFP process remains fragmented, often relying on outdated criteria that lack the flexibility to assess agencies based on their ability to craft cohesive, brand-building strategies across physical and digital channels.

As companies continue to evolve the way they do business, it is imperative that they also evolve the way they do *“new”* business.



Redesigning

How RFPs Are Built and Agencies Bought

At Omnicom Commerce, we have restructured our approach, uniting Marketing and Sales strategies under a model where we “design how brands are built and bought at retail.” This integrated approach ensures that every brand interaction—whether in-store or online—resonates with consumers on an emotional level, creating experiences that go beyond simple transactions and foster deeper connections with the brand.

While we are seeing an increase in the frequency of RFPs, many clients and procurement teams still attempt to run the same pre-pandemic playbook. But the most forward-thinking ones are evolving, adapting their processes to better utilize their time when selecting a new agency. From my perspective, there are three key trends that clients and procurement teams should be aware of:

01 *Saving* Time with *Insights*

02 *Making* Time for *Values*

03 *Taking* Time to *Understand*

LET'S EXPLORE EACH TREND





Saving
Time With
Insights

Trend

01



Saving Time With *Insights*

The first trend is the fact that clients no longer need to do a full-scale pitch. Instead, I am seeing a few innovative clients now engaging agencies with an inspired approach – opting for a streamlined RFI (request for information) process that gives the client insights into agencies strategic approach and financial details. This allows for the client to require minimal timelines, allocate minimal budgets, and most importantly, take minimal risks – all for maximum reward.

For traditional RFPs, it used to be clients would brief an agency, and then after three or four weeks of little to no communication, there would be a grand presentation that was supposed to produce all the answers. However, in an everyday partnership with agencies, clients are much more involved in the strategic and creative process. This new and updated RFI process allows agencies – with an in-person meeting – to showcase their full capabilities, by revealing key case studies that highlight their ability to bridge the gap between marketing and sales, as well as financial details. From here, clients normally award the agency with a small paid project on a real-world issue to get a good look at agencies before handing them the keys to the business kingdom.

This “Try Before You Buy” type of pitch allows clients to not just conduct an agency search, but more importantly a partner search, giving them the real insights to see how the agency works with them to solve real problems in real time. In working with one Marketing Manager on a pitch of this nature, she told me the reason they went this route was because,

“We wanted to date before we got married, and this increased involvement is where we really learned how your agency thinks, produces work and ultimately partners with our team.”





*of all RFPs coming into
Omnicom Commerce
are "Paid Pitches."*

Additionally, sometimes (but not always) clients are seeking a multiple-agency solution. This approach gives clients and procurement teams the ability to see how multiple agencies collaborate with each other as well as test their ability to manage and complete projects across tight timelines. It also gives clients a "peek under the hood" at how the agencies are interacting with each other and if those interactions are in the client's best interest.

In the past, I would not be inclined to review a full RFP pitch for a single project, even with some revenue attached. In fact, these types of RFPs used to make up less than 10% of our yearly number. Today, they make up over **33%**.

This shows that we (and other agencies) are embracing this approach, as we now look at these opportunities as a "paid pitch." We still have to invest the time and resources to (hopefully) secure more work/revenue, but even if we are not chosen, it is not a complete loss for us. Plus, great agencies like mine love our chances once we get a real project. We are confident our compelling approach to commerce – and partnership – will secure incremental projects in the future.

This new approach is especially useful when clients don't have the time or revenue to do a full pitch. The trend shows us you don't need an expensive, long, and grand pitch process to see the partnership potential of agencies. The truth is that we put as much effort into these smaller opportunities as we would the larger RFPs of old.



Making Time For *Values*

Trend

02



Making Time For *Values*

This second trend is by far the one clients continue to ignore or fight, and trust me, it's a losing battle. If you are going to do a full-scale RFP, regardless of the revenue being offered, give yourself a minimum of two months. I've seen many clients try to complete a full process in a month because they're up against the clock on their agency selection. If you don't have the proper time to do one, re-read Trend #1 and please give it serious consideration. Remember, you're not just looking for ideas, you're looking for a partner.

On a yearly average, I see a little more than a third of opportunities come from companies and clients our agency and people haven't worked with before. These opportunities are what I call "cold calls" as we are truly going in blind. For clients, this percentage is exponentially higher, as they will invite three to five agencies to participate and only have experience with working with maybe two of them. With this in mind, companies should make the most of their time getting to know exactly who these agencies are.

While the quality of the agency's product is still a major decision-maker, more than ever the quality of its people and culture tells you if it is going to be a compatible partnership. If the pandemic taught us anything, it's that a company's values are paramount in the decision to spend money on their product. As one client told us during these meetings, "We didn't decide to leave our last agency because their work was bad, we left because they weren't good partners."



*of all RFPs coming into
Omnicom Commerce
start with a **Chemistry Meeting***

Chemistry meetings – or even simple capabilities meetings where you meet and learn about the potential team – are back on the rise. With virtual meetings still an inconvenient truth of our world, clients are doubling down on getting to know as much as they can about the agency from the outset. In fact, about **60%** of all our RFPs started out with two (and sometimes three) weeks of these types of meetings, well before any assignment briefings took place.

With this, procurement teams are now mandating all key decision-makers be available and present for all key steps, from briefings to Q&As and final presentations. With agencies participating in the process giving it everything they have, it's disheartening when we arrive at the meeting and some clients "couldn't make it." With those clients giving more of themselves throughout the process, it showcases the values of your company to us, ultimately exciting us to want to work with you more.

Another truly appreciated aspect of making time, is when clients give the agency more than an hour to present both their capabilities and final presentation. In a perfect world, two hours is ideal for each. This gives the agency time to present, and more importantly, gives you time to make comments, challenge, and debate the work. The more discussion you allow throughout the process, the more you will learn about each agency.

And after making all that time to get to know each agency, you've given yourself all the information needed for the most valuable step in any pitch – your decision. Agencies understand there are a ton of good partners out there, and a clear winner is not always that obvious. However, there is cost and pain associated with dragging out a pitch, as each agency put in the effort and investment during the process. You don't have to rush your decision, but if it is not made within 10 working days, you're setting yourself up for constant questions from the agencies like, "Any news yet?" "Can we provide you with anything else?" "What is the holdup?" If you put the time in the beginning of process to get to know each agency well, the problem of making a quick, decisive outcome will solve itself.

Across Omnicom Commerce, 80% of all the RFPs we participated in that said a final decision was being made under six weeks from its release, saw a delay of at least two weeks. This proves (at least to me), that even when you think you can complete the process in less than two months, two months is still the minimum. As one procurement manager communicated to me,

"The last time we did an RFP of this size, we rushed it, and ultimately ended up with an agency not right for us. Having to do this again so soon, we were not making the same mistake twice."

Remember, it was a major decision for your company to put out an RFP, make sure you give it the time in order to do your search justice. If you allow yourself the time and use that time effectively to choose the best partner, you will save yourself the time of having to do another RFP, if things don't work out. Which leads us to our last trend.



Trend

03

Taking
Time To
Understand



Taking Time To *Understand*

Every agency will tell you, the best pitches happen when there is open and consistent communication from the client. Over-communication ensures we fully understand what your expectations are. The more an agency is told about the process, the better the agency can show you what you are looking for and why. Be open about how many agencies you've invited to participate. Be open about what your selection criteria are for awarding the business. Be open about what the scope of work and agency fee will be for the winner.

Furthermore, the best RFPs I have ever participated in are where there are two major steps added to the process. First, we've had multiple clients build in an "Agency Check-in" between the briefing call and the final presentation. Clients gave the agencies an hour to share and discuss anything the agency believed would help solidify their final presentation by giving a work-in-progress preview of their approach.

"After thinking about this more, we have some additional questions about your target."

"Are we heading in the right direction with our strategic approach?"

"Does this concept feel like something that would energize your system?"



What is critical about this meeting, is that there is no judgment of the content shown. Instead, there are no bad ideas, only good conversation where each side understands a little more about the other, ultimately allowing the agency to revise any or all of their work before the final presentation. This “Agency Check-in” allows the partnership to start off strong by building trust between the agency and client, and allowing each to understand the best process to partner. It also allows the client insight into how well the agency responds to feedback. Did the agency apply their learnings to the final presentation and if so, was it in an unexpected way?

Second, and admittedly this has been rare, I’ve seen a couple of clients build in a “Client Check-in” after the final presentation. These clients weren’t afraid to schedule a follow-up with the finalists to get further clarity on our ideas, our process, or our people. It allowed them to ask hard questions and dig deeper into our work to see what new insights they could glean.

In one of these processes, the procurement lead explained to me why they added this step.

He said,

“Every other project we have with our agency is more than one round. Why should a major decision like this be made on only one?”

This over-communication was genuinely appreciated by our agency, and even though it lengthened the process, we were even more engaged when we heard this.

But the greatest understanding you can give an agency is around your decision. Why did you decide to go with us as your agency? What was it that we did that you gravitated toward? What are some things, now that we are your agency, that you need to see more of? The understanding you provide to these questions sets us up for not only a successful onboarding process, but assigning the right teams to staff against your business.

Conversely, be honest with why you didn’t choose us. We understand this is a business decision and it’s not personal. We’re all adults, we can take it. Just like you use data and insights to better sell your products, we use your feedback to better sell ourselves. When you do give this feedback, make sure it’s tied back to the selection criteria you outlined in the beginning. One of the best conversations I’ve ever had was one with the Head of Marketing who told me they were going in a different direction. She told me, “Your agency feels like a Ferrari, but we are still driving on a dirt road.” From this one conversation, I understood and respected the decision. With this mutual understanding of each other, we are still in touch and discussing possible future opportunities to partner.

A More Inspired Way of *Engaging*

In closing, traditional RFPs are dying a quick death. But this is giving birth to the rise of more innovative ways of identifying and securing agencies. **These three trends – Saving Time with Insights / Making Time for Values / Taking Time to Understand** – are redefining the new business process so it fits better into today’s ever-changing world. If my goal, and the continuous goal of Omnicom Commerce, is to be a true partner to our current and potential clients as they restructure their Marketing and Sales teams, we need to remain open and share these trends with our industry.

It’s about setting us all up for the best results possible, which means adapting and evolving the way we *“pitch”* business.

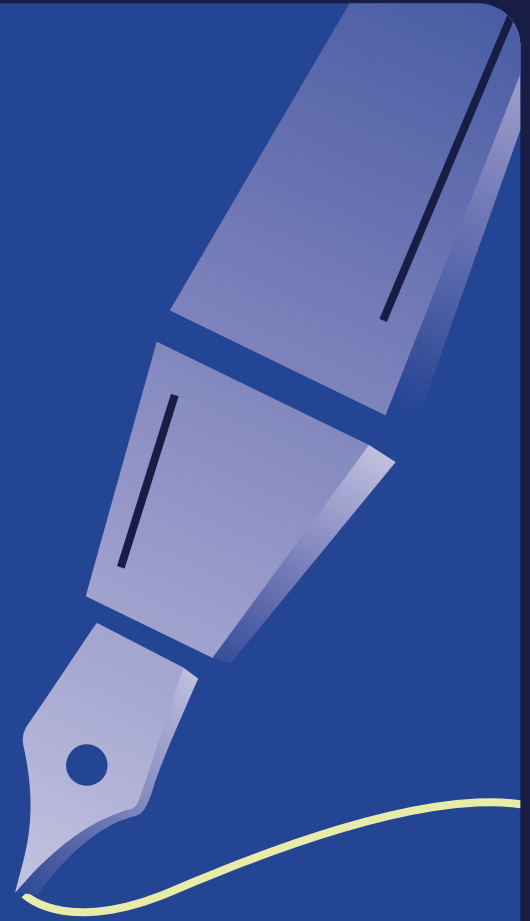
If you’re looking to identify a new partner in the future months, and want to discuss any of these trends in greater detail, please don’t hesitate to reach out. I’m happy to work with you and your procurement team to help craft a new business process tailored to your needs. And of course, if there is an opportunity to participate, I’d love the chance.

About the

Author



Stephen – or Miller as we affectionately call him – is not your typical “agency suit.” A 25+ year veteran of Omnicom, his approach to traditional client service is different than most. His people-first attitude allows him to understand both client and agency needs, enabling him to decrease issues and increase confidence. After partnering with and supporting some of the largest global brands (Pepsi, Pizza Hut, SC Johnson, LEGO and AB InBev just to name a few), he is currently serving as the Chief Growth Officer for Omnicom Commerce, spearheading all Business Development for the company.



About

Omnicom Commerce



Omnicom Commerce (OC) is a global, industry-leading suite of capabilities, comprised of award-winning specialized agencies deeply versed in the intricacies of physical and digital commerce, working with brands and retailers to offer best in class consultancy, creativity, and consumer experience in service of delivering conversion and growth. OC’s priority is to address the need for innovative multichannel commerce expertise in the rapidly evolving world of retail and shopping. OC is a part of the Flywheel Commerce Network (a division of Omnicom Group, Inc.) that employs 2,500+ people across 20 markets.

