

# Digital Advertising

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A Producer's Guide to Best Practices



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These principles of COMMUNICATION, TRANSPARENCY, and MANAGING EXPECTATIONS will help agency and production company producers create better working relationships and ultimately, better work.

As digital advertising continues to evolve so will the contents of this guide.

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# Define Scope

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- When bidding, the agency should meet internally with key members to define scope, deliverables, responsibilities, and expectations prior to bidding a production partner.
- The agency should supply the production partner with a Bid Spec Sheet with known details about the project prior to the first phone call.
- It's also important for everyone to know if the project has been “sold through” to the client, and what, if any, budget parameters have been discussed with the client.





# Clarity of Expectations

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- The agency should be clear upfront regarding their expectations for a treatment. If the agency is looking for something in particular, let the production partner know. And if funds have been allocated for the development of a treatment, please share this information too.
- Developing a thoughtful treatment involves considerable time, money, and resources. This isn't the design phase, it's the production partner's initial response to the agency creative brief. As a rule, requests for revisions to treatments should not exceed one round, and if additional revisions are required, they should only be requested of the "agency-recommend" production partner.



# Set an Even Playing Field <sup>5</sup>

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- If the agency wants a prototype or animation test, they should explain why they need it. These tests cost money, so if they are not necessary at this phase, please let all bidders know.
- When a production partner has been engaged to give technical or creative advice prior to the bidding process, that production partner should be included in the list of preferred partners to bid on the project.



# Set an Even Playing Field <sup>6</sup>

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- The agency should not share a production partner's treatment or ideas with another production company. These ideas and treatments are the production partner's intellectual property until purchased by the agency or client.
- The agency should never take ideas from one production partner's treatment and use it with a different awarded partner, or use it in a separate project.

# Use a Mutual NDA

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- When the agency issues a NDA (a Non-Disclosure Agreement, also known as a Confidentiality Agreement) to the production partner, provide them with the version that is mutual. Most agencies have one.

This mutual NDA will protect the agency/client's confidential information, and it will also protect the production partner's confidential information included in their treatment and bid documents.





# Be Transparent

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- It's proper protocol to tell the production partners who they are bidding against and how many companies are bidding on the project. Please notify bidding production partners when other companies drop out or are added during the bidding process.
- The production partner should be transparent about its availability. Let the agency know if it is bidding on multiple projects for the same time period. If the production partner needs to drop out of the bidding process, they should inform the agency immediately.





# Be Transparent

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- Both the agency and the production partner must be clear about the teams for the project. The agency should disclose who will be involved from their team, and the production partner should do the same.
- The production partner should inform the agency if they plan to outsource any of the project. This is especially important when different time zones are involved, which will impact scheduling and communications. If the agency is expecting a specific person to work on the project, inform the production partner upfront.



# Be Transparent

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- The agency should be transparent about the budget. If the budget is unknown, give the production partner a ballpark, and tell them it's a ballpark.
- Production partner's bid should be tied to the actual methodology. If a portion of the bid is a ballpark, the production partner should be specific about their assumptions and conditions. If the production partner cannot meet the agency's budget parameters, let the agency know as soon as possible. Manage expectations.





# Awarding a Project

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- When awarding a project to a production partner, the agency should also send an email or place a phone call (preferred!) to the production partners that did not get the project, and tell them why. It won't hurt their feelings - all information and feedback is valuable.

# Payment & Deliverables

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- The agency should submit production partner invoices as soon as they receive them and follow up with their accounting department regarding the projected payment dates.
- If the production partner or agency/client has a specific policy regarding their payment requirements or terms, that information should be relayed to each other at the outset of the project.





# Feedback and Approval

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- At the start of the project, the agency and production partner should discuss the feedback and approval process. Be specific with respect to the schedule and key milestones. Don't be afraid to ask questions; this is a great time to learn and understand each other's process.
- The number of rounds of feedback and revisions should be communicated upfront in the Statement of Work or the Bid.
- Compile all stakeholders' comments, avoid sending feedback piecemeal in emails.
- It is highly recommended an online review tool (i.e. GitHub or Basecamp) is set up at the beginning of the project to track all feedback and issues.





# Expectation of Time

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- Everyone's time is valuable; please respect it.
- The production partner should not expect the agency to wait around for links to presentations that were promised hours earlier. The agency should not expect the production partner to work nights and weekends and then be available for reviews first thing the next morning.
- Be on time for conference calls and meetings. If there is going to be a delay, give a heads-up as soon as possible so everyone can plan accordingly.



# Overages

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- The production partner should not do extra work and then tell the agency there is going to be an overage after the fact. If the production partner suspects something is out of scope, inform the agency immediately. The production partner should flag ideas that could possibly trigger an overage, and follow up with the agency as soon as the additional costs have been calculated. Always get overages approved before the work is done.



# Overages

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- The agency should be clear with the client when it comes to overages. The agency should explain to the client that a change in scope will often involve an overage. The agency should also inform the client that once they have approved a phase of the project, any changes will likely result in an overage.
- Signed overages are an addendum to the production contract. The agency should make sure the person signing the overage has the full authority to enter its client into this binding agreement.
- All overages should be approved in writing. Never accept a verbal agreement as approval. Email approvals are okay up front but should always be followed with an approved, revised estimate.





# PR Plan

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- The agency and the production partner should coordinate their PR plans.
- The agency may have a PR plan for rolling out the work that the production partner is not aware of, so it's best the production partner checks in with the agency before posting it to their website or submitting the work to award shows, even if the Bid Spec Sheet states they have approval to do so.

# Upon Completion

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- Upon completion of the project, both the agency and the production partner should give each other a call to discuss the outcome of the project. This is a good opportunity to ask for or offer feedback on what worked.
- Constructive, honest feedback will help streamline the process for future jobs, which will ultimately improve the working relationships, save the client money, and produce better projects.



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**As mentioned earlier,  
this Digital Producer's Guide  
is a living, evolving document.**

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## v.1 was a collaborative effort involving the following people:

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