

Agency Information Document Standardization Questionnaire

1. Agency Background & Identity

1. What is the full legal name of the agency?
2. When was the agency founded (month and year)?
3. What is the agency's mission statement?
4. What is the agency's vision statement?
5. What are the core values of the agency?
6. What is the agency's unique selling proposition (USP)?
7. What is the current ownership structure of the agency?
8. Is the agency part of a larger network or holding company? If yes, provide details.
9. What is the agency's total annual revenue for the past three years?
10. What is the agency's year-over-year growth rate for the past three years?
11. How many full-time employees does the agency currently have?
12. How many part-time employees or regular contractors does the agency work with?
13. What office locations does the agency maintain (include all global locations)?
14. What is the agency's registered business address?
15. What are the agency's primary contact details (phone, email, website)?

2. Agency Services & Capabilities

16. What primary advertising services does the agency offer? (List all)
17. What specialized or niche services does the agency offer?
18. What creative capabilities does the agency have in-house?
19. What production capabilities does the agency have in-house?
20. What digital capabilities does the agency have in-house?
21. What media planning and buying capabilities does the agency have?
22. What research and analytics capabilities does the agency have?
23. What strategic planning capabilities does the agency have?
24. What emerging technology capabilities (AR, VR, AI, etc.) does the agency have?
25. What services are typically outsourced to partners or vendors?
26. Who are the agency's key strategic partners or vendors?

27. What proprietary tools, methodologies, or frameworks has the agency developed?
28. How does the agency approach integrated campaigns across channels?
29. How does the agency ensure consistent messaging across different platforms?
30. What is the agency's approach to campaign measurement and reporting?

3. Agency Experience & Expertise

31. What industries or business sectors does the agency specialize in?
32. What specific product categories does the agency have deep experience with?
33. Who are the agency's current top 10 clients by revenue?
34. How long has the agency worked with each of its top 10 clients?
35. What is the average client tenure across the agency's entire client roster?
36. What is the agency's client retention rate over the past three years?
37. Who are the agency's longest-standing clients (5+ years)?
38. Has the agency worked with any Fortune 500 or equivalent companies? If yes, which ones?
39. What geographical markets has the agency developed campaigns for?
40. What notable new business wins has the agency achieved in the past two years?
41. What accounts has the agency lost in the past two years, and why?
42. What case studies best exemplify the agency's work? (Provide brief summaries)
43. What campaigns have received industry recognition or awards?
44. What types of clients is the agency currently targeting for new business?
45. Are there any industries or client types the agency declines to work with?

4. Team Structure & Key Personnel

46. What is the agency's organizational structure?
47. Who comprises the agency's executive leadership team?
48. What are the backgrounds and experience levels of the executive team members?
49. Who are the agency's department heads or team leaders?
50. What are the qualifications and experience of department heads?
51. Who are the agency's most senior creative personnel?
52. Who are the agency's most senior strategic personnel?
53. Who are the agency's most senior account personnel?
54. What is the standard team structure assigned to client accounts?

- 55. How are teams typically assembled for new client pitches?
- 56. What is the average experience level of staff across different departments?
- 57. What is the agency's approach to team diversity and inclusion?
- 58. What is the staff turnover rate for the past three years?
- 59. What professional development or training programs does the agency offer?
- 60. What industry certifications or qualifications do staff members hold?

5. Creative Approach & Philosophy

- 61. How would you describe the agency's creative philosophy?
- 62. What is the agency's creative process from brief to execution?
- 63. How does the agency approach creative problem-solving?
- 64. How does the agency foster creativity and innovation?
- 65. What sources of inspiration does the agency draw upon?
- 66. How does the agency incorporate cultural insights into its work?
- 67. How does the agency ensure cultural relevance and sensitivity?
- 68. How does the agency approach creative testing and optimization?
- 69. What role does data play in informing creative development?
- 70. How does the agency balance creative vision with client business objectives?
- 71. How does the agency approach brand storytelling?
- 72. How does the agency maintain creative consistency across campaigns?
- 73. How does the agency refresh or evolve long-running campaigns?
- 74. What creative trends is the agency currently exploring?
- 75. What creative risks has the agency taken that have paid off?

6. Client Service & Account Management

- 76. What is the agency's account management philosophy?
- 77. How are client relationships typically structured?
- 78. What is the standard process for onboarding new clients?
- 79. How frequently does the agency typically communicate with clients?
- 80. What reporting and presentation formats does the agency use?
- 81. How does the agency handle client feedback and revisions?

- 82. What is the agency's approach to scope management?
- 83. How does the agency handle scope changes or additional requests?
- 84. What is the agency's process for managing deadlines and timelines?
- 85. How does the agency ensure consistency in client service?
- 86. What client satisfaction measurement systems are in place?
- 87. What is the average client satisfaction score for the past year?
- 88. How does the agency resolve client conflicts or disputes?
- 89. What is the agency's approach to client education and knowledge sharing?
- 90. How does the agency help clients navigate industry changes?

7. Strategic Approach

- 91. What is the agency's approach to developing brand strategy?
- 92. What strategic frameworks or methodologies does the agency employ?
- 93. How does the agency approach audience identification and segmentation?
- 94. How does the agency conduct consumer insights research?
- 95. What competitive analysis techniques does the agency use?
- 96. How does the agency identify market opportunities?
- 97. How does the agency approach brand positioning development?
- 98. What is the agency's process for creating strategic briefs?
- 99. How does the agency measure strategic effectiveness?
- 100. How does the agency approach channel strategy development?
- 101. How does the agency balance short-term tactics with long-term strategy?
- 102. How does the agency approach budget allocation across channels?
- 103. What is the agency's philosophy on brand purpose and values-based marketing?
- 104. How does the agency approach international or global strategy?
- 105. How does the agency identify and respond to cultural shifts or trends?

8. Media Capabilities & Approach

- 106. What media planning capabilities does the agency offer?
- 107. What media buying capabilities does the agency offer?
- 108. What media platforms and channels does the agency have experience with?
- 109. What is the agency's approach to traditional vs. digital media?

- 110. How does the agency approach programmatic media buying?
- 111. What media planning tools or software does the agency use?
- 112. How does the agency negotiate media rates and added value?
- 113. What is the agency's approach to performance-based media?
- 114. How does the agency measure media effectiveness?
- 115. What attribution models does the agency typically employ?
- 116. How does the agency approach cross-channel integration?
- 117. What is the agency's viewpoint on emerging media channels?
- 118. How does the agency handle media reconciliation and reporting?
- 119. What media partnerships or preferred vendor relationships exist?
- 120. How does the agency ensure media transparency?

9. Digital & Technology Capabilities

- 121. What digital marketing services does the agency provide?
- 122. What social media capabilities does the agency offer?
- 123. What website development capabilities does the agency have?
- 124. What mobile application development capabilities does the agency have?
- 125. What e-commerce capabilities does the agency have?
- 126. What SEO and SEM capabilities does the agency offer?
- 127. What content marketing capabilities does the agency provide?
- 128. What email marketing capabilities does the agency have?
- 129. What marketing automation capabilities does the agency offer?
- 130. What CRM integration capabilities does the agency have?
- 131. What data management and analysis tools does the agency use?
- 132. How does the agency approach user experience (UX) design?
- 133. What emerging technologies (AI, AR, VR, voice, etc.) has the agency implemented?
- 134. How does the agency stay current with digital trends and innovations?
- 135. What digital performance metrics does the agency typically track?

10. Operations & Process

- 136. What is the agency's typical project management methodology?

- 137. What project management tools or software does the agency use?
- 138. What is the agency's process for estimating and scoping work?
- 139. How does the agency determine pricing for services?
- 140. What billing methods does the agency use (retainer, project-based, hourly, etc.)?
- 141. What is the agency's approach to resource allocation?
- 142. How does the agency manage workload and capacity planning?
- 143. What quality control procedures does the agency have in place?
- 144. What approval processes are standard for client deliverables?
- 145. How does the agency archive and organize past work?
- 146. What information security protocols does the agency follow?
- 147. Does the agency have any relevant certifications (ISO, etc.)?
- 148. How does the agency handle intellectual property rights?
- 149. What is the agency's policy on ownership of creative work?
- 150. How does the agency handle confidential client information?

11. Innovation & Future Direction

- 151. How does the agency foster innovation within its teams?
- 152. What R&D initiatives is the agency currently pursuing?
- 153. How does the agency identify and evaluate new technologies?
- 154. What is the agency's approach to testing new platforms or methods?
- 155. How does the agency balance proven approaches with innovation?
- 156. What industry trends is the agency actively monitoring?
- 157. What investments in technology has the agency made recently?
- 158. How is the agency preparing for future changes in advertising and marketing?
- 159. What is the agency's vision for its own evolution?
- 160. How does the agency help clients prepare for future market changes?
- 161. What is the agency's approach to sustainability and social responsibility?
- 162. How does the agency measure its environmental impact?
- 163. What diversity, equity, and inclusion initiatives is the agency implementing?
- 164. How is the agency addressing changing privacy regulations?
- 165. What is the agency's stance on ethical advertising practices?

12. Results & Case Studies

- 166. What are the agency's most significant client success stories?
- 167. What specific metrics or KPIs has the agency improved for clients?
- 168. What ROI examples can the agency provide from past campaigns?
- 169. What is the agency's approach to campaign performance optimization?
- 170. How does the agency define and measure success for clients?
- 171. What business challenges has the agency helped clients overcome?
- 172. What creative solutions has the agency developed that exceeded expectations?
- 173. What long-term brand metrics has the agency improved for clients?
- 174. What sales or revenue impacts has the agency achieved for clients?
- 175. What cost-saving efficiencies has the agency created for clients?