

DATE:  
TO:  
FROM:  
RE: Advertising Agency Questionnaire

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Love & Company has outlined several questions that may be helpful when reviewing and ultimately choosing the right advertising agency for your new site, expansion, or repositioning. Choosing the right agency is an important decision and will influence the success of filling YOUR COMMUNITY. We believe these questions will guide you when vetting out the agency of choice for the expansion.

### Potential Questions when Interviewing an Agency

- ❖ What industries do you currently work with?
- ❖ How many continuing care retirement communities have you done work with over the past 5 years?
  - How many of those continuing care retirement communities did an expansion or was a blue sky (new community to be built)?
    - How many of those did you lead the advertising creative and production?
    - Can you elaborate on “how you develop and consistently tell the story” of the expansion or blue sky?
    - What type of creative mailers (postcards, 4-panel, 6-panel) have you done?
    - What type of creative mailer do you typically recommend?
    - Can we see samples of your work?
    - Can you share the marketing results without disclosing confidential information?
- ❖ How many members do you have on your creative services team?
  - Are they employed by the company or freelance? How many of each?
    - How many years, on average, has your employed members been at the company?
    - How many years, on average, has your freelancers been working for the company?

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- How many years experience do they have with the senior audience/senior living field and developing creative for continuing care retirement communities?
- Does the same creative member/team work consistently on one account?
- ❖ Do you copywrite the creative materials for your clients or is it up to the client to copywrite the materials?
- ❖ Do you guarantee the finished creative if you direct the creative services and production?
  - Do you go to the printers to do press checks on large printing jobs or when you use a new printer?
- ❖ Do you typically use non profit postage for direct mail or do you use first class postage?
- ❖ Do you work with a select few printers or do you quote jobs out to receive the best pricing?
- ❖ What percentage of time, for a typical client, do you go over budget for a direct mail creative project? What about under budget?
- ❖ What percentage of time, for a typical client, do you miss a creative project deadline? What do you do to minimize this happening?
- ❖ Describe a typical process, including client checks, for a creative project.
- ❖ Describe the process of how you work collaboratively with your client to:
  - Determine the strategy of a piece?
  - Review the piece with the client?

### **Digital**

- ❖ What CMS do you use?
- ❖ What CRMs and marketing automation systems have you worked with?
- ❖ How are websites hosted and managed?
  - How much is your annual hosting, and what does it include?
- ❖ Can I make edits to the website?
  - If yes, to what extent?
  - If no, how much can we expect to pay?
  - How are websites continuously refined?
- ❖ Do I own the content and the website? Can it easily be taken over by our community, or move it to be managed by another agency?
- ❖ Do you typically integrate websites with Facebook or other social media?

- ❖ What type of reporting is available after a website is built and live?
- ❖ Do you typically integrate a website with the community intranet?
  - If no, why?
- ❖ Do you develop websites in such a way so that a community can take advantage of a non-profit status?
- ❖ Do you have a team that can provide digital media management?
  - If so, how big is the team and how many years experience do they have managing digital media for senior living organizations?
- ❖ Do you provide services to effectively build and manage a nurturing email campaign? What is your strategy to acquire cost-effective leads?

### **Other**

- ❖ If community decides to leave the agency, how is artwork, website, collateral handed off to another agency?
  - Does the community own the artwork, website and collateral?