

Briefing an Agency

A best practice guide to briefing communications agencies



Joint industry guidelines for marketing professionals in working effectively with agencies
2nd edition, February 2011

Why briefing an agency is important

“The equation is simple, tightly written briefs plus passionate briefing equals engaged agencies, impactful campaigns and strong market results.”

Dominic Grounell Marketing Director, Capital One

If your role involves marketing communications, then briefing an agency is one of the most important things you do. How you brief determines what you get back. This is reflected in agencies having to say rather too often that: “clients get the work they deserve”.

Do all great communication campaigns come from great briefs? No. But the chances of getting good if not great work are increased significantly by a brief into which some real thought has been invested.

Marketing communications, be that any of the disciplines of advertising, digital, PR, direct, social media etc, not only involve a substantial financial investment, but have the potential to change the shape of the business, for better or worse. Briefing communications agencies requires the same level of professionalism, attention and thought as any other area of business activity. Just because it involves creativity and ideas does not mean that these qualities are needed less, indeed they

are needed more because of the degree of subjectivity involved.

Whether it is a top creative agency or a small local outfit, a major strategic initiative across multiple disciplines or a specialised low value project, the same core principles of good briefing can be applied.

At its heart it's about working out what you want and communicating this in a way that gets the right result.

The result of a better brief is that the right work is delivered faster. This can have a dramatic effect on efficiency and on costs. If on average it takes an agency three presentations of work to get to the bought solution imagine the saving in time and cost of reducing that process to an average of two, or even getting it right first time.

Better briefing will produce better results faster and at lower cost. It's not a business option but a business imperative.

About this guide

This guide aims to help anyone involved in briefing any type of communications agency on how to do it better. It explains the principles of any good brief, the reasons why a written brief is important but not sufficient, the role of the briefing meeting, and provides guidance on written briefing forms.

As a best practice guide it draws upon the experience of leading marketing practitioners and their agencies. In compiling this guide we have conducted research amongst over 140 advertisers and agencies including many of the largest spenders and agencies in the UK, held an industry seminar and used the expertise of consultants.

This guide to 'Briefing an Agency' is an updated version of a joint industry publication originally titled, 'The Client Brief'. Whilst the original publication still has relevance, there are two factors in the contemporary dynamic communication and agency world that have required an update; firstly the emergence of digital communications as one of the leading expenditure categories. Whilst many advertisers have already adapted their briefing processes to reflect this, still one of the most asked questions is, 'how do I brief for digital communications?' Secondly, the proliferation of specialist agencies in addition to consolidation of agency groups prompts questions about how to brief across agencies or how to brief for integrated solutions.

In this guide digital communications are considered as one of many channels, and are

subject to the same fundamental principles of good briefing. Whilst there are specific differences which are highlighted, briefing digital agencies can be improved in much the same way as briefing any other agency. When this guide refers to digital communications this refers to digital advertising, social media, mobile etc. and excludes briefing websites, which arguably requires a different focus.

This guide forms part of a series published by the leading industry organisations including IPA/ISBA/MAA/PRCA and this 'Briefing an Agency' guide has been led by ISBA in conjunction with MAA,PRCA and IPA.

It can be seen as fitting between the 'Finding an Agency' guide and 'Judging Creative Ideas' guides and focuses on briefing an agency once it has been selected and is not relevant to the selection process.

The latter is covered in 'Finding an Agency', another guide in the series.

With many thanks to John Howkins of the Nub Consultancy for his specialist expertise on briefing and his hard work drafting this guide.



ISBA - Debbie Morrison



MAA - Scott Knox



PRCA - Richard Ellis



IPA - Hamish Pringle

Why write a brief?

Whilst most advertisers acknowledge the need to write a brief, there are still too many verbal-only briefs to agencies. The reasons given for not writing a brief often include:

*“It’s a fast-track project” “I don’t have the time”
“The agency already understands what’s needed”*

Excuses are quickly exposed when the resulting work is not what is required. A little time writing a brief pays dividends in the longer term. Even a short email stating the aim of the project clearly is much better than relying solely on a hurried verbal briefing.

Writing a brief is good business practice, and without it, it’s the advertiser that is exposed.

There are three compelling reasons to write a brief:

It leads to better work

Without a written brief the work can be creatively brilliant and extremely effective in working against the wrong objectives. Even if the aim has been verbally expressed, agreement in writing is essential to avoid any doubt or misunderstanding and to have shared clarity of purpose.

Where ‘better’ is seen as more effective, measurable work, the lack of a written brief means there are no agreed objectives, no criteria for success, and therefore no means of evaluating how effective the agency’s work is.

Where ‘better’ is seen as more creative, respected or award-winning work, then similarly this aim will have not been made explicit in writing to everyone involved. (A research study from the IPA, Thinkbox, and The Gunn Report, has revealed the direct correlation between strong advertising creativity and business success)

Agencies are also very clear on their wish for written briefs.

“Writing it down actually forces the client to think, and they inevitably change their approach when they do.” (Agency Survey)

It saves time and money

No-one wants to waste time and money, but often the agency time is viewed as more expendable than the advertiser’s. Efficiency all round is only achieved by clear aims and focus of effort.

The view that not writing a brief is faster, assumes that faster to the first presentation of an idea is the aim, rather than faster to agreed work. We need to take into account that most ideas presented are not agreed first time. So saving time in the short term is often a false economy.

How does writing a brief save money? Where time is saved this clearly saves money, not just the agency’s time but also the ability of the advertiser to get into the marketplace faster and therefore get a return on investment (see Page 10 on ‘Improving the business efficiency of briefing’)

“Sloppy briefing and moving goal posts wastes time and money” (Agency Survey)

It makes remuneration fairer

Written briefs act as a form of contract between advertiser and agency. They should lay out what the agency is expected to deliver in a clear and measurable way. Without mutually agreed KPIs or measurable objectives, the agency’s work can only be evaluated subjectively, leading to dissatisfaction with PBR and other remuneration schemes based on performance.

“The point of a brief isn’t to be buttoned up and restrictive; it’s to give clear direction on what’s important and to clarify the issue that you’re seeking to address. The problem with informal briefing is that it makes a huge assumption that the person being briefed shares the unstated knowledge of the person doing the briefing. It’s likely that some key facts or knowledge in the client’s mind aren’t written into the brief, because they assume the agency will already know these. And that’s where the misunderstandings can begin.”

Will Collin Partner, Naked Communications

The principles of effective briefing

What makes a good brief is founded on some basic principles which can be applied to almost any briefing situation. There are three basic principles:

1. Be clear about what is needed
2. Provide the critical information necessary to complete the task
3. Inspire or motivate people to do their best

These principles apply equally to briefing marketing communications as briefing many other things in life. Often with marketing communications we make it over-complicated and forget the basic principles ending up with the agency being unclear on what is required. In other areas of life we do things more instinctively and use the most efficient means of briefing - for example, it's sometimes faster and more accurate to brief a hairdresser by using a picture rather than a verbal description.

Clarity of objectives

It seems self-evident that the most important part of a brief is a clear description of what the aim of the brief is. Yet in our industry review of briefing techniques this is consistently the weakest area of written briefs. It is often confused with overall business, brand or marketing objectives, whereas the single most important content section is the communication objective itself. Some briefs simply describe the sales target without any thought as to the role of communications.

Agencies need this clarity and it is the responsibility of the person writing the communications brief to provide this. As one agency person commented,

“More time should be spent on trying to understand or describe the problem or opportunity rather than ‘hinting’ at the solution.” (Agency Survey)

A brief should be just that

There used to be a rigour in advertising agencies to keep creative briefs to just one page. The principle behind this is relevant to all briefs – that is that it should be possible to boil down any brief to something that is succinct and memorable.

If it isn't, it's likely to be less effective. At the very least aim for something which can be remembered when the piece of paper is not in front of the person or team that has been briefed - if the writer of the brief can't even remember what it was about without a prompt, what chance is there of others internalising what is required?

Of course there is room for attachments and additional material. Sometimes a large volume of background material can be helpful as one seemingly small bit of information could prompt a thought that leads to the solution. But best practice is to provide only the critical information that

is relevant to the task. Why make agency people wade through masses of irrelevant information? Often it is a lack of thought that leads to this approach.

As Blaise Pascal wrote as long ago as 1657: “I have made this letter longer, because I have not had the time to make it shorter.”

Fundamentally brief writing is about making decisions about what is needed. Deciding what to leave out is part of that.

There is an argument that some types of tasks require longer briefs. For example, those which are for media which themselves require a large degree of content, such as a traditional direct mail pack or website builds. Whilst there may be a need to provide greater depth of supporting material, the overall brief itself still needs to be simple and clear.

Inspired to greatness

When asking marketing people ‘What makes a good brief?’, the answers are mostly about objectives, requirements, target audience etc. Only on prompting do people recognise that inspiring the agency or the team to produce great work is a critical element. Perhaps clients assume that an agency will be motivated enough by remuneration, the fear of losing the business, or simply by any opportunity to do good work.

However experience shows that those clients who not only put more thought into their brief, but also use their own creativity to make briefing the agency or agencies an inspiring experience, tend to get better results. There are three main reasons for this: **firstly** the brief will stand out from the other assignments that the agency is working on and get an unfair share of attention. **Secondly** a client who has put more thought into the presentation of their brief is likely to have greater empathy for agency psychology and the creative process making it more likely that they have provided the springboard for a great creative leap. **Thirdly** a client who delivers a great brief signals that they are in the market for a great creative response, and likely to be excited rather than frightened by one.

If inspiring the agency is recognised as a basic principle of good briefing it should influence both the way the brief is written and the way it is briefed in. A key new section to this guide is about the briefing meeting which is just as important as the written brief itself, and provides the opportunity to motivate the agency team in a very direct way.

To motivate or inspire anyone, there needs to be a good understanding of what’s important to that individual or organisation. Understanding what’s important to agencies and the particular agency being briefed comes from closer working relationships. Where both organisations recognise common aims then success is far more likely to be achieved.

The marketing communications briefing format

There are many different ways of creating a written briefing format for marketing communications. The format should reflect the company's beliefs about how communications work and therefore what is important enough to be included in the brief.

Some advertisers may use versions of their agencies' creative brief formats as a basis for their own. Whilst this may initially look as if it is encouraging a collaborative way of working, it does demonstrate a lack of belief in the company's own practices. An agency's internal creative brief usually serves the fundamentally different purpose of inspiring their own creative people. A client marketing communications brief needs to inspire the **whole** agency team to deliver the best communications.

Most marcoms briefs also act as a business process document to initiate a job start – in effect it's a purchase order and since large sums of money will be involved in both time and resources it needs to be taken very seriously.

To provide a best practice guide to constructing a briefing format we analysed responses to the research survey and combined this with formats supplied during training sessions. From the research survey a significant number of advertisers are using a style which uses a set of questions based on a strategic planning approach (Stephen King et al). These were set out in the first edition of this guide and it's gratifying to see their adoption.

These are:

- Where are we now?
- Where do we want to be?
- What are we doing to get there?
- Who do we need to talk to?
- How will we know when we have arrived?

These questions provide the logic for the thinking process for a brief. Often they are used as sub-heads to the broader section headers e.g. Target Audience (who do we want talk to?). This interrogative style acts as a form of tutorial for those writing the brief.

It also became clear that most marketing communications briefs have three broad areas of heading; those that describe the background, the brief itself, and an implementation and process section.

The background headers might include

Background:	Usually covers the business and marketing context and why the task is important
Marketing or Sales Objectives:	This sometimes includes the business case for the activity
Brand:	Remarkably this is often overlooked. It might include brand identity/brand capsule/brand vision/brand architecture/brand status/brand values/brand personality
Previous Learning:	Again a section which is only used occasionally, but may have wider potential

The main communications brief section headers might include

Communications objectives:	Sometimes they might be expressed as communications imperatives/ challenges/barriers
Target audience:	Usually this section asks for more than simple demographics and specifically prompts for attitudes or other motivators
Consumer insights:	Sometimes specifically linked to the objective
Key message/proposition:	Often phrased as the single-minded proposition/the one thing we want to say
OR	
Strategic benefit:	May ask for emotional and functional benefits
Consumer takeout:	Or consumer take away/what they will think or do
Tone of voice:	As distinct from brand personality

The implementation and process headers might include

Timings/key dates:	May include project timelines as well as timing for response
Budget:	May specify if production is included or not
Response mechanisms:	On relevant types of brief
Evaluation/success criteria:	A critical element for most disciplines
Mandatories/guidelines:	May include what must be included and executional considerations
Approvals:	Signatures of both those issuing/approving the brief and the agency

The choice of 'proposition/message' or 'strategic benefit' is one which reflects the thinking of the organisation and the relationship with their agencies. The use of a 'proposition' on the marcomms brief can be quite closely related to how many agencies use a 'proposition' in their own creative briefs. This could be seen positively as aligning thinking. An alternative view is that the role of the communications brief is to be clear about what the benefit is, and leave it up to the agency to think through how to best express that as a compelling proposition. This is largely a matter of style.

Writing the brief

Many people find the prospect of writing a brief a big challenge. This is often because there is a perceived pressure on getting to a brilliant proposition or message. But if the writer thinks of the proposition as being a consequence of the communication objective and the consumer insight then it becomes an easier challenge.

Other traps are to start at the top of the form and work downwards (often until people become stuck at the proposition section). Work out what you want to say before starting to fill out the form. Avoid 'cut and paste'. Just because the business plan has a section on this year's business and marketing objectives does not mean it is relevant to every brief. Work out what the specific objectives are for the brief that is being written.

Don't use marketing language or jargon that is familiar to everyone in your organisation, but may be meaningless to the agency. So much internal marketing language is full of meaning based upon the culture of the organisation but is not clear to someone outside of that culture. Simple and clear language will result in a better brief.

There are other tips for writing a better brief in the summary section at the end of this guide.

Briefing your agency

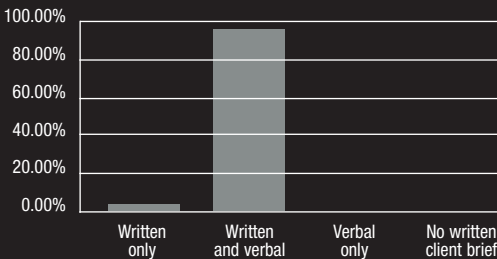
Our research shows that most advertisers believe that a combination of a written brief and a verbal briefing is ideal (98% agree). But the reality of what is delivered to agencies is that verbal-only briefings are the commonest (almost 50% of briefs are verbal only). Research also indicated that significant numbers of briefs nowadays are verbal with only a short email or even SMS text message way of written confirmation.

“An email could be a written brief if it gives all the required information, especially now that email has become dominant as the principal medium of communication between clients and agencies. Within the industry today there are many more global or multinational assignments where you’re dealing with overseas clients – and that means even if you do receive a written brief the likelihood is it’s going to come via email.”

Will Collin Partner, Naked Communications

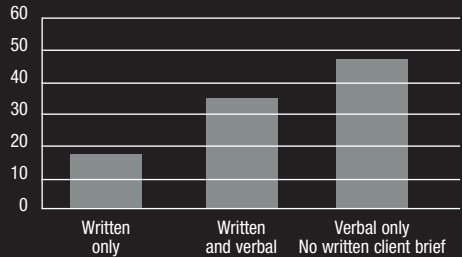
Advertisers agree that agencies prefer both written and verbal briefs

Q5. Which type of brief do you think most agencies prefer?



Yet most briefs are still verbal

Q7. Approximately what proportion of briefs received are of the following type?



It’s quite understandable that verbal briefings happen often, especially where there is a good working relationship, and high level of trust, and possibly a requirement for fast turn-around. Indeed the client may value an agency’s ability to anticipate their needs almost without needing briefing, but unless there’s a written brief there is no record of what is required or how the creative output will be evaluated and things can go badly wrong. Best practice is to always issue a written brief and follow up verbally. In the case of a verbal brief first, it must be confirmed in writing and if email is used for this, then it needs to be more than a one-liner.

In this world of client requirement for ever-faster response times, there’s a lot to be said for an annual re-investment in the client/agency common understanding of the strategic direction of the brand. There is this shared understanding after a major agency review, thus enabling the ‘shorthand’ of briefs,

but over time the combination of personnel changes and market circumstances can lead quite quickly to misalignment and misunderstandings. So it's a good idea once a year at least for the client and agency team to take time out to re-affirm the strategy and the brand's direction of travel.

For larger projects, a briefing meeting should be considered. The role of a briefing meeting is often underestimated. It is not just to offer the agency a means of asking questions about the brief and clarifying areas of uncertainty. It is also an opportunity to create a deeper understanding of what is required, to emotionally engage with the task, and so inspire and motivate.

The industry has many examples of briefing meetings where the agency is taken somewhere to inspire them, or to illustrate the point of the brief. Thinking about what will motivate the recipient to answer the brief well is a part of any briefing whatever its size or importance.

Briefing for integrated ideas

Getting integrated ideas is high up most advertisers' agendas. The reason being that communications ideas that use all disciplines together should create a 'multiplier effect' and gain maximum value from communications budgets.

Most advertisers claim to brief more than one agency at a time (over 80%) which should lead to more integrated ideas. This is usually when there are major new initiatives or annual campaigns.

Reference: from *'Judging Creative Ideas' guide: Unilever took the Comfort Brand team and the Agency team off for two days sailing in the Solent. "You feel an odd sort of loyalty towards people you've seen being sick" said Sean Gogarty from Unilever. This initiative helped inspire the 'Cloth People' campaign now running around the world.*

The briefing meeting can also have a role in helping shape the brief itself. Collaborative working practices where the agencies and clients work together to define the way the task is framed are encouraged by most industry organisations. The result is often a joint ownership of the problem and the solution, which can be much more productive.

Another 'watch out' for briefing meetings is to avoid just going through the written brief. The agency can read! Think about what will help them beyond what has already been written down.

The disciplines that are most often briefed together are advertising/brand agency, media and digital agencies, but many other types of agency may also be included dependent upon the task.

The integrated marketing communications brief, often known as the IMC, is commonplace in global businesses. This brief is often a much simpler version of the briefing format and reflects the beliefs and approach of the company. It may then be accompanied by discipline specific briefs.

As the aim of an IMC brief is to produce one idea that works across disciplines, some advertisers place the onus on the agencies to work together to produce one solution. In the research, agencies reported that this can create tensions between disciplines where one agency takes the lead role and does not fully recognise the contribution of others. Projects which work best are those where there is openness to where ideas can come from.

There are a number of different ways that advertisers can organise themselves and their agencies to produce integrated communications strategies and solutions. With reference to 'The Communication Strategy' guide, these are:

The Client-led model:

Where the client, instead of asking any agency to devise a communication strategy, does that strategic thinking themselves. This model is based around the primacy of the client's knowledge.

The Lead Agency model:

Where the client charges one agency with the responsibility of creating the communication strategy for the other agencies on the roster to follow.

The All Agency Model:

Where the client acts as 'ringmaster' to bring together key people from all the different agencies. This model is about collective expertise.

The One-Stop-Shop Model:

Where leadership is provided by one agency group (e.g. WPP, Publicis), but the individual agencies involved within that group collaborate to devise communication strategy.

"It is about assembling the best in class talent you have available to be in the room at the same time, each area of expertise having respect for one another and all members of the client and agency being completely open and honest..." **David Magliano** Director of Commercial and Marketing at England 2018

Briefing for digital solutions

In the rapid development stages of digital communications many advertisers have treated digital as a separate discipline with specialist managers dealing with specialist agencies. Whilst that still may be true, the new research reports clients as saying that digital is often briefed together with other creative agencies and media agencies.

In fact briefing for digital communications solutions can be regarded as being very similar

to briefing any other discipline or channel.

The same principles should apply. However there are some fundamental differences in digital communications, with the most obvious being the unique opportunity for an instant and ongoing dialogue via social media. This changes the relationship putting the consumer in control and demanding that the advertiser seek permission to engage. This may mean that the brief is more focussed on how the

brand behaves in this new social media context rather than the more traditional proposition which tended to rely on a message about a competitive benefit.

Some digital areas may be regarded differently because of greater technical requirement, for example, search engine marketing (SEM) is highly specialised. But the same basic principles should apply to briefing.

For web design and build there is also a strong argument that specialist skills require a different briefing format. But the basic principles of understanding what motivates the agency and using that in writing the brief still

apply. This does not deny that specific skills and knowledge are undoubtedly needed to be effective.

For digital briefing, the headers on the brief form may well use different terminology, but clarity of objectives, provision of essential information needed to complete the task, a good working relationship, and the motivation to do a good job are all essential.

The same principles also apply for many other marcoms disciplines that apparently look quite different but in reality follow a remarkably similar thought process - PR, media, promotions etc.

Improving the efficiency of your briefing process

Measurement, benchmarking, and target setting are standard practice in nearly all areas of business, but the agency briefing process is often an exception. Perhaps this is because the end product is less tangible, and it is associated with the complexities of trying to untangle the efficacy of one element of the marketing plan from the effect of all the others.

“We want people to tell us exactly what the challenge is, what constraints they are operating under, and what KPIs they are putting against it. Unless they know what the KPIs are, we can’t really make a value judgement about what the right response might be.”

Chris Whitson Planning Partner, Stephens Francis Whitson.

But looked at logically there are a number of simple metrics which can and should be monitored.

- How long does it take from writing a brief to the agency receiving it?
- How long does it take for the agency to respond to a brief?
- How often does the agency present work that is bought first time?
- How many times does the client ask the agency to re-work an idea?

These are all fairly simple things to measure provided there is a good process with written briefs, dates of issue and receipt, and contact reports of creative presentations and re-works.

Measurement allows a means of assessing efficiency even if it is only benchmarked internally. External benchmarks are harder to find, but a study by Farmer & Co reported an average re-work rate of 3.6 times to get to a final bought solution.

Imagine if the re-work rate was reduced by say 25%. This would produce substantial savings in time and cost. To illustrate the point here are some basic calculations:

On a marketing budget of £1m, a delay of two months due to poor briefing could cost the business up to £183,000 in lost sales (based on linear relationship of advertising/sales ratio of 3% and marketing investment ROMI of 10% and assuming there was no replacement activity).

The point being that most marketing managers do not think about the costs of delay or inefficiency in briefing. Whilst clearly the most important requirement is to get the work right, the costs of delay, prevarication and indecision are substantial.

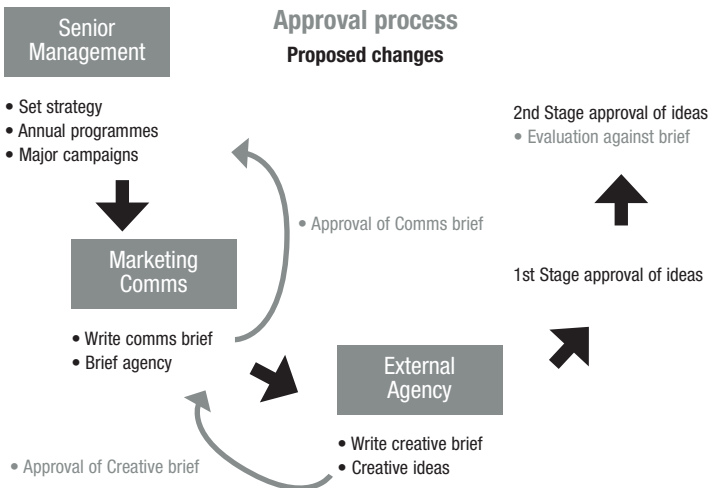
Approval processes for the brief need to be aligned with those for the creative work

One source of inefficiency in briefing is where

the approval process does not align with those for the creative work. This could be where very senior management review work for major projects without having signed off the marketing communications brief in the first place. The use of personal judgement is fine, but where it's not aligned to the agreed brief it can cause wasted time and effort. The schematic below shows a typical company approval system and how it might be improved.

“Any regular turnover of marketing people in a client organisation has an effect on the entire process. There is a direct impact on shared understanding and ultimately on the brand DNA. Seniority, experience and tenure should not be undervalued in a relationship. Also, the more people involved in a process, the more room there is for ambiguity and error. So a defined and transparent input and approval system is critical for the briefing process.”

Neil Simpson Chief Executive, Publicis



Top tips - for the briefing organisation

- Develop a briefing format that reflects your organisation's beliefs about communication
- Keep the briefing form simple and provide guidance on how to use it
- Recognise the difference between the marketing communications brief and the agency's internal creative brief
- Apply the same best practice principles to digital briefing as any other, but recognise the technical differences
- Consider the best suited model for getting to integrated solutions and brief accordingly
- Consider more collaborative ways of working and agreeing the final brief
- Monitor the efficiency of the briefing process (time to issue brief, number of re-works)
- Review your organisation's efficiency of briefing alongside that of the agency
- Align the approval process for the brief with the approval process for the creative work
- Treat briefing with the same levels of professionalism, standards and accountability as any other area of business

Top tips - for the brief writer

- Before you write anything, think
- Don't just fill out a form, but use the form to record your thought process
- Be absolutely clear about the aim of the communications brief
- Separate the communications objectives from the business targets or broader marketing objectives
- Deciding what you leave out can be as important as what you put in
- Include only the relevant and critical information in the brief with the remainder in the attachments
- The proposition or message should be the consequence of the rest of the brief
- Understand your agency audience and what motivates them
- Think about how to make your brief stand out from the others
- If you do give a verbal brief it's essential to confirm it in writing, even if only by email.

Remember a brief is a cheque that will be cashed...

For more information

Our hope is that this guide will encourage all to think in more depth about briefing techniques and that clients and agencies will focus more joint efforts on developing briefing excellence. If you would like more copies of the guide, which is also available as a PDF download please contact your appropriate trade body below.

Many of the organisations involved run training sessions on this subject and ISBA also provides in-house training for clients on improving briefing techniques – details can be found on the websites below:

Institute of Practitioners in Advertising

Tel: 020 7235 7020

www.ipa.co.uk

ISBA - the voice of British advertisers

Tel: 020 7291 9020

www.isba.org.uk

Marketing Agencies Association

Tel: 020 7535 3550

www.marketingagencies.org.uk

Public Relations Consultants Association

Tel: 020 7233 6026

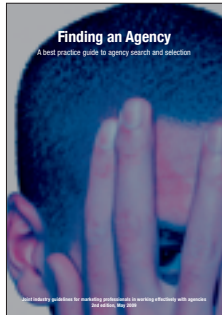
www.prca.org.uk

The Nub

www.thenubconsultancy.com

Other guides available

There are five other joint industry guides available, all designed to help you get more from your communications agencies. Please contact the IPA, ISBA, MAA or PRCA for more details.



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