

PRACTITIONER GUIDE

Agency Selection in the AI Era

The wrong agency costs more than its retainer.

Ismail Albishi

Senior B2B Marketing Advisor · Founder, albishi.net

What You Get

An applied pack, not a theoretical guide. Five concrete templates by the end of the read:

1

Weighted scoring framework with mandatory gates

11 weighted criteria for objective evaluation

2

RFP template ready for customization

Included in the companion toolkit

3

BAFO request structure

Included in the companion toolkit

4

RACI Matrix for roles and decision rights

Included in the companion toolkit

5

Saudi compliance checklist

PDPL · Mawthooq · Etimad · NCA · Saudization

Download the toolkit:

albishi.net/get-templates

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OPENING SECTION

Before You Search

Internal diagnosis before any conversation
with an agency.

The Truth That Costs You Millions

If I had one riyal for every time I heard "the agency didn't work for us," I would own an agency by now.

After more than twenty years in B2B marketing across telecom, government, logistics, and consumer goods - on both sides of the table, as client and as partner - I've learned one lesson at a steep price: choosing an agency is not a routine procurement decision. It is operational and strategic at the same time.

But the truth is harder than that. Sometimes the agency is genuinely weak. Other times the company picked the wrong type of agency. And in many cases, the company tried to buy an external solution to an internal problem. All parties entered the relationship with unrealistic expectations from day one.

Path One

Faulty Diagnosis

A decision driven by impressions, a budget that burns step by step, and results that cannot be measured.

Path Two

Criteria-Driven Decision

Documented decisions, disciplined reviews, and a budget verifiable step by step.

This playbook is not academic research. It is the distillation of cumulative, on-the-ground experience - in rooms where decisions were made, some of which I paid for and some of which I benefited from.

I wrote it for one reason: so that your company does not pay twice for a faulty diagnosis - once at selection, and again at execution.

Ismail Albishi

Senior B2B Marketing Advisor | albishi.net

Who Is This Playbook For?

This playbook was written for three groups involved in the agency selection decision.

Track One

Decision Makers

CEO, CMO, CXO's
Business Unit Heads,
Founders, Business
Owners

Their Role in the Agency Decision

They approve the budget, sign off on the final recommendation, and execute the contract. Their decision determines whether the relationship begins or ends.

Track Two

Process Leaders

CMO, VP Marketing
Marketing,
Communications, and
Brand Teams

Their Role in the Agency Decision

They lead the evaluation and selection process, build the day-to-day relationship with the agency, and measure performance. Agency success or failure starts here.

Track Three

Decision Influencers

Procurement, Sales,
Business Development,
Legal

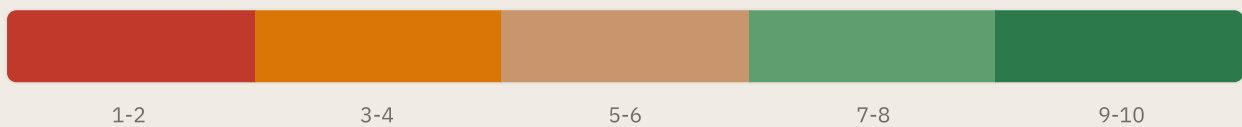
Their Role in the Agency Decision

They review contractual terms, assess the agency's impact on their objectives, and hold veto power. Ignoring them means surprises after signing.

We recommend reading the entire playbook - each section builds on the previous one.

Before You Contact Any Agency

Answer the following ten questions honestly. Your answers determine whether you are ready to enter a relationship with an agency, or whether you need to fix your internal operating model first.



#	Question	Answer
1	Can I write the problem I want to solve in three lines?	Yes / No
2	Is there a documented decision mechanism (RACI or Decision Rights Matrix)?	Yes / No
3	Do I have a defined budget or an approved financial range?	Yes / No
4	Have I defined the scope of work: number of deliverables, cadence, and complexity?	Yes / No
5	Is there a person or Marketing Operations team that will manage the relationship daily?	Yes / No
6	Do I have written Brand Guidelines or core messaging?	Yes / No
7	Can I provide customer and market data to the agency?	Yes / No
8	Is the approval policy (SOP) documented: who approves and in how many days?	Yes / No
9	Is the evaluation team cross-functional, not a single individual?	Yes / No
10	Do I have realistic expectations for the timeline and early results?	Yes / No

Fewer than 5 Yes

**Do not search for an agency
now**

The problem is internal first.
Solution: albishi.net/smmi/

5 to 7 Yes

Close the gaps first

Start with a fixed-scope pilot,
not an open-ended contract.

8 to 10 Yes

Ready to start

Use the Scorecard,
enter an RFP or Pitch Campaign.

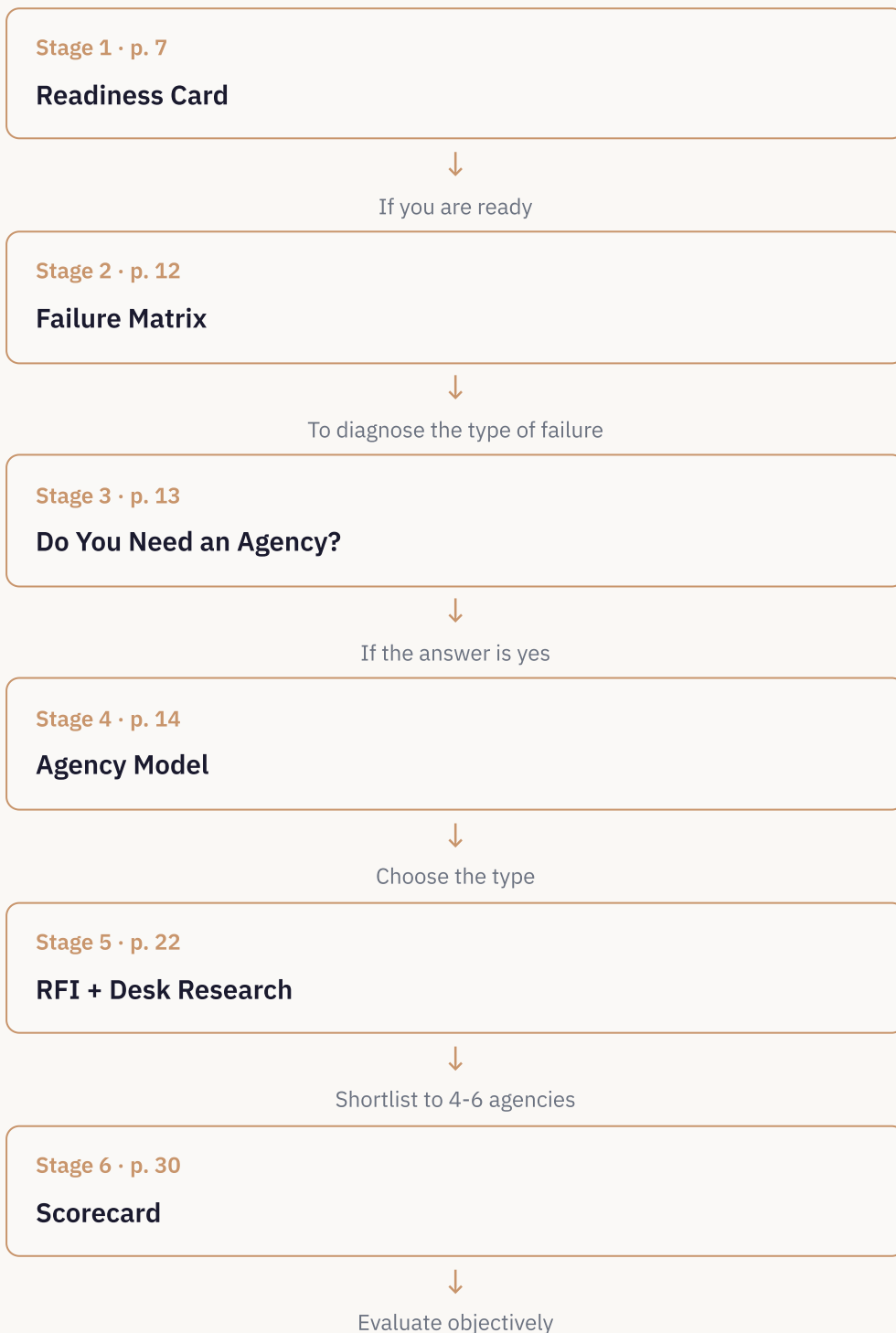
Note for large enterprises: These ten questions are the minimum bar. Larger organizations require a Steering Committee, a Marketing Operations Team, and a documented Decision Rights Matrix for every organizational level.

Print this page and complete it with your team before sending any RFP

7-Stage Methodology + 5 Templates

5 deliverable templates, supported by a 7-stage methodology.

The playbook contains seven interlocking stages. No stage works in isolation. This map shows how you move from diagnosis to execution.



Stage 7 · p. 24

BAFO

Cross-reference: Scorecard (Section 8, p. 30) is applied during stages 3 and 5 of the map above.

The Rule: Do not move to a stage before completing the previous one. Skipping ahead produces hanging decisions and costly corrections later.

PART 1

The Playbook

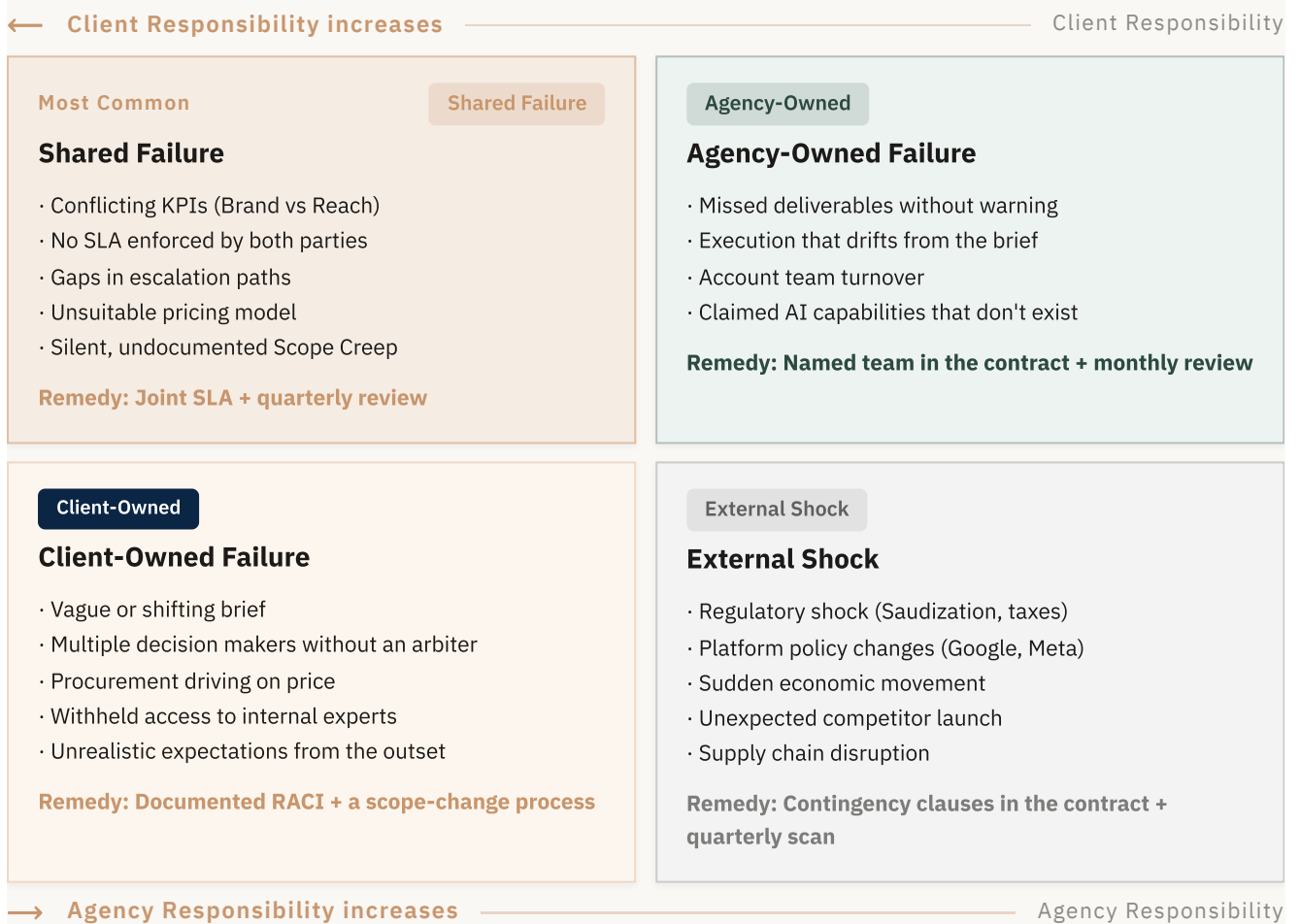
Framework, models, trends, map,
methodology, and criteria.

DIAGNOSTIC FRAMEWORK

The Four Failure Map

The Failure Map - four causes, three owners, one remedy for each

The agency relationship breaks down in four distinct places, each with a different owner and a different remedy. The prevailing narrative blames one party; the reality is that **Shared Failure (Q4)** is the most common and the least acknowledged.



Executive Pre-Assessment Analysis: Before launching an RFP, mark which quadrant describes your last failed agency relationship. If it was Q3 or Q1, the most important investment is not a new agency - it is fixing what you own in the process.

"Most relationships do not break because of a poor choice alone. They break because the two parties never agreed on a definition of success before they started, and never designed a process that surfaces drift early."

Do You Actually Need an Agency?

Before asking "Which agency?", ask first: "Do I need an agency?" Many companies rush into contracts to solve problems that cannot be solved externally, and pay the price later.

You don't need an agency if

- Your core problem is the absence of an internal strategy
- No one owns the decision or reviews deliverables
- The task is simple execution that a single independent specialist can handle
- You are still searching for Product-Market Fit

You need an agency if you have

- A clear need with insufficient internal capability
- A transformation project: identity, launch, repositioning
- A need for speed or specialization that cannot be built in-house now
- A capable internal owner who can manage the relationship daily

Alternatives Based on Your Situation

Situation	Best-Fit Solution
No clear vision or owner	or Advisor to build the foundation first
You know the problem and need a specific skill	Independent specialist or a specialized agency with narrow scope
Temporary need or a large launch	Agency on a project contract, not an open-ended Retainer
Your problem is operational: CRM, automation, data	A MarTech specialist, not a creative problem
The problem is clearly defined with a measurable outcome	Hybrid or specialized agency with a detailed SLA

Diagnose your situation first: SMMI helps you pinpoint exactly where the problem lies. In the strategy? Execution? The team? Governance? Before any decision. albishi.net/smmi/

The Three Agency Operating Models

Before asking "Which agency?", ask first: "Which operating model?" That question matters more, because it determines how the agency will work, what it will cost, and where your budget actually goes.

Dimension	Traditional	AI-Augmented	Hybrid
Monthly cost	SAR 40K to 180K+	SAR 15K to 80K	60-85% lower
Speed	Weeks	Days	Hours to days
Output	Baseline	3-5× higher	3-5× higher, with ownership
Where the value sits	Relationships and network	Efficiency and creativity	Control and lower cost
Where the risk sits	Slowness and a sales team that is not the delivery team	Requires human oversight	Requires a strong internal team

Traditional
Highest cost

AI-Augmented
Lowest cost

Hybrid
Best value

AI alert: An agency that saves 60% of its costs thanks to AI but bills you at the full human-team rate is not an AI agency. It is a traditional agency using AI to inflate its margin at your expense. In the RFP, ask directly: how has AI savings been reflected in your price?

Where the radical cost reduction actually happens: in video, motion, Key Visuals, and Versioning production. An ad film that once cost SAR 2 million can now be produced for SAR 150-200 thousand using tools like Google Veo or Seedance, particularly when heavy on-location shooting is not required. The cause is not the tool alone, but the collapse of studio, Art Direction, Creative Direction, headcount, working hours, and total time. This is a redefinition of the cost equation, not a discount.

MARKET INTELLIGENCE · 2025 to 2026 data

AI Trends in Marketing

Before evaluating any agency that claims to be an "AI agency," know what the research actually says. These are numbers from **McKinsey**, **BCG**, **Deloitte**, and **Gartner** - not opinions.

\$1.1T

Marketing and sales share of annual GenAI value

McKinsey (derived estimate)

60-80%

Production cost gap: AI-Native vs traditional agency

Pixelmojo 2026

5-15%

Productivity uplift as a share of total marketing spend

McKinsey

\$15-17B

Projected size of the Saudi AI market by 2032

MarketsAndMarkets + analyses

Methodological Note: McKinsey estimates the annual potential value of generative AI at USD 2.6 to 4.4 trillion globally across all functions, with the marketing and sales share estimated at around USD 1.1 trillion (a figure derived from sub-line items within the report, not an officially published headline number). Saudi AI market: shared estimates from MarketsAndMarkets and secondary analyses (vision2030.ai) place it at USD 15-17 billion by 2032, up from a few billion in the mid-2020s. Exact figures vary by methodology and data source.

Where the Reduction Is Radical (60%+) and Where It Is Limited

Output category	Reduction	Documented example
Video and motion production	80-95%	A studio film with non-celebrity talent produced for SAR 150-300 thousand instead of SAR 2 million (see detail below)
Key Visuals and design	60-80%	MidJourney, Firefly, Canva AI
Versioning and multiple variants	70-90%	20 versions instead of 2 for the same effort
Translation and localization	80-99%	HeyGen reached \$35M ARR in a year through localization automation

Output category	Reduction	Documented example
Marketing content writing	50-99%	Sage Publishing: 99% of time, 50% of marketing cost (Jasper)

Limited (5-15%): Strategy, brand positioning, complex B2B content, stakeholder relationship management, and deep qualitative research.

A Saudi Market Example: Limits and Redefinition

An ad film was produced at a cost of SAR 2 million, with most scenes shot inside a studio using non-celebrity talent, and one exterior scene. In 2026, a film with the same visual specifications can be produced for SAR 150 to 300 thousand using tools such as Google Veo or Seedance.

The natural limits of savings: Films requiring complex scenes (real military aviation, unique outdoor locations, celebrity talent, action scenes with live performers) remain expensive, and the savings there are far smaller.

The question that should be asked: Why was SAR 2 million paid for a studio film in the first place? The answer is usually: a traditional agency structure that inflated the cost before AI emerged. This is a redefinition of the cost equation, not merely a discount.

Four Mandatory Questions in the RFP

1. In which line items of your proposal does AI reduce your costs?
2. What is the actual percentage reduction in each line item?
3. How is that reflected in the contract price?
4. If it is not reflected, who benefits from the margin - us or you?

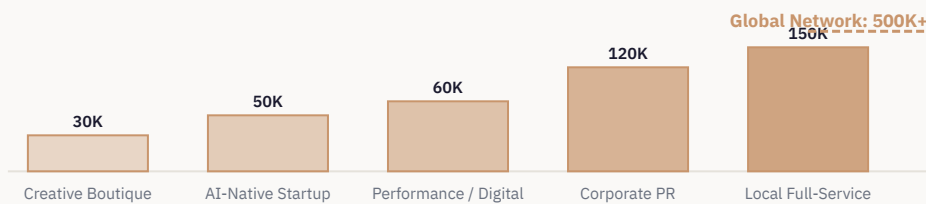
The Saudi Context: Studies project that artificial intelligence will contribute roughly USD 135 billion to Saudi Arabia's GDP by 2030 (about 12.4% of GDP), according to PwC reports and Vision 2030, alongside substantial government and investor commitment to digital infrastructure and human capital. Marketing and sales are among the expected top beneficiaries. 58% of Saudi and UAE consumers use GenAI (Deloitte 2025; higher than the UK), and 73% have purchased through Social Media (Deloitte 2025).

Sources: McKinsey "Economic Potential of Generative AI" 2023, BCG "From Potential to Profit: Closing the AI Impact Gap" 2025, BCG "AI Agents for Growth" 2025, Gartner AI Marketing Forecast, Pixelmojo "AI-Native vs Traditional" 2026, MarketsAndMarkets "Saudi AI Report" 2025, PwC "Sizing the Prize: GCC AI Impact" + Vision 2030, Deloitte Digital Consumer Trends 2025.

Agency Map of the Saudi Market

Before examining any specific agency, understand the six main agency types in the market, and the monthly Retainer range for each. The numbers are indicative, but they give you a frame for comparison.

Monthly Retainer (SAR)



Agency type	Monthly Retainer (SAR)*	Definition	Strengths	Weaknesses
Global Network Global Network	150K to 500K+	A local office of a global network (WPP, Omnicom, Havas). Delivers the full stack: strategy, media, creative, PR, digital.	Multi-market coordination, comprehensiveness	B2B depth, speed, cost
Local Full-Service Local Full-Service	40K to 150K	An independent Saudi agency offering multiple services under one roof. Smaller than a global network, larger than a boutique.	Local context, fast responsiveness	Deep B2B specialization, foreign markets
Creative Boutique Creative Boutique	80K to 500K	A small team of 5-20 specialists in creative: identity, campaigns, art-driven content.	Ideas, visual identity, execution quality	Digital performance, project-based B2B logic
Performance / Digital Performance / Digital	20K to 100K+	Specialized in paid campaign management, SEO, conversion rate optimization, and data analytics.	ROAS, CAC, direct measurement	Brand building, deeper messaging

Agency type	Monthly Retainer (SAR)*	Definition	Strengths	Weaknesses
AI-Native Startup AI-Native Startup	10K to 50K	A new agency (under 3 years) built around AI tooling: accelerated content production, generative creative, automation.	Speed, efficiency, cost	Governance, strategic depth, stability
Corporate PR Corporate PR	25K to 120K+	Public relations and reputation: crisis management, press releases, media relations, conferences.	Reputation, crises, corporate visibility	Demand generation, sales conversion

* Figures are indicative. Actual cost varies by: company size, scope of work, contract duration, specialization depth, sector, and reputation. Some telecom operators and banks pay close to SAR 1 million monthly for a single agency.

The most expensive agency is not automatically the best. A small agency may give you its senior managers directly. A large agency may give you their juniors after the contract is signed.

The Selection Framework - 9 Steps



Define the problem



Size the work



Partner model



A serious Brief



Selection method



Substance over theater



SLA and flexibility



Contract for reality



Manage the relationship

1. Define the problem before searching for the solution

If you cannot write the problem in three lines, do not request a proposal from an agency. The agency will fill the gap with its own guesswork.

2. Size the actual scope of work - 90% skip this step

How many deliverables per month? How many campaigns per quarter? What are the peak periods? Without this, you are comparing proposals built on different assumptions.

3. Choose the right partner model

Lead agency with specialists? Hybrid? Fractional plus execution? If your internal team is small, don't start with four agencies.

4. Write a serious Brief, not a courtesy document

A two-page Brief is stronger than a forty-page RFP. Invite 8-12 agencies for the long list, narrowed to 2-3 for the pitch. Don't hide the budget.

5. Choose the right selection approach

A Pitch Campaign is the strongest filter; the serious ones lean in and the rest drop out. A SAR 45 thousand pilot project has saved companies from a half-million-riyal contract.

6. Evaluate substance, not theater

What matters: understanding your sector, quality of the actual team, delivery discipline, measurement logic, and whether they researched you before the meeting.

7. Verify flexibility and SLA

Can they double output during LEAP or Ramadan? Request a written SLA specifying response times, review cycles, and escalation.

8. Contract for reality, not optimism

Fixed-scope pilot, then a 6-month contract, then annual renewal. Never sign a full year before testing. Every riyal tied to a clear deliverable.

9. Manage the relationship; signing is not the finish line

The first thirty days determine the fate of the relationship. A thirty-minute weekly standup is stronger than a forty-page monthly report.

The Professional Selection Path

RFI → RFP → Pitch → BAFO → Decision

Five external stages (RFI → RFP → Pitch → BAFO → Decision) operate inside the 7-stage internal methodology shown on p. 9-10.

Five sequential stages, each with its own output and passing criterion. Skipping leads to ill-considered decisions. Global practice traces this path to the ANA/4A's Guidelines for Agency Search, updated in 2011.

1. Internal Preparation *Preparation*

Two weeks

Goal: Full internal readiness before contacting any agency.

What gets done: A clear written Brief, a documented RACI (decision maker, relationship owner, influencers), an approved budget, a Scorecard with weightings, and a cross-functional evaluation team.

Output: Draft RFP + a list of 8-12 agencies to receive it.



2. Request for Information - Long List *RFI*

One week

Goal: Narrow the list from 8-12 to 4-6 qualified agencies.

What is requested: Basic information only (team size, prior experience, operating model, PDPL licensing, GAMR). No creative work and no detailed pricing at this stage.

Output: 4-6 agencies qualified for the next stage (expected response rate 70%).

The Golden RFI Rule

Don't ask an agency for information you can find on the internet. Before sending a formal RFI, complete desk research on every agency in your Long List. 30-45 minutes per agency saves you weeks of unproductive meetings.

What Can Be Measured From the Internet

#	Criterion	Primary source
1	An actual office in Saudi Arabia	Official website + LinkedIn
2	Visible headcount	LinkedIn
3	Recent hiring and vacancies	LinkedIn Jobs
4	Recent news (12-18 months)	Google News + trade press
5	Recent leadership appointments	News + LinkedIn
6	Recent published work	Website + LinkedIn + Instagram
7	Recent awards	Awards websites + agency site
8	Clarity of specializations	Official website
9	Experience in your sector	Website + Case Studies
10	Strength of local presence in content and work	LinkedIn + website

Four Classification Axes

Axis	Underlying criteria
Presence	Saudi office, headcount, number of offices, local leadership
Vitality	Recent news, hires, open roles, publishing cadence
Visible quality	Recent work, awards, clarity of specialization, tangible production
Fit	Sector experience, service mix, local content

The 18-month rule: Any agency with no visible activity in the last 18 months (no news, no hires, no published work) = red flag. They are either in crisis, relying on only two clients, or quietly winding down.



3. Short List + RFP + Pitch *Short List*

3 weeks

Goal: Competitive evaluation based on actual work from each agency.

What gets done: Detailed brief + a strategic question + a mandatory Q&A briefing call before submission. Scoring by Scorecard (11 criteria, 80%+ to pass).

Rule for presentation day: Request the deck two days in advance, hold an internal session, enter the presentation with pointed questions, not as a passive audience.

Output: 2-3 agencies qualified for the final round.



4. Final Proposal - BAFO *Best and Final Offer*

Two weeks

Goal: A final refinement based on written technical feedback.

What gets done: First, each of the 2-3 agencies receives written technical feedback from your team and resubmits a refined proposal within 7-10 days. After submission: an office visit (Chemistry Visit) and reference checks with 3 prior clients.

Global procurement rule: Do not tell an agency it is on the Short List during BAFO.

Output: A refined final proposal + a second Scorecard evaluation.



5. Internal Decision - Final Decision *Decision*

One week

Goal: A single documented, collective, transparent decision.

What gets done: Closed internal evaluation (no agencies present): re-apply the Scorecard to the BAFO + Pitch performance + Chemistry. Decision requires 75%+ approval from a cross-functional team. Then: contract negotiation, SLA, and the transition checklist.

Output: One selected agency + a formal notification + a debrief for the unsuccessful agencies.

Total timeline: 9-10 weeks from the first Brief to signature. Breaking this rule is expensive: do not compress the process under pressure from an internal launch. Every week you save in selection costs you 3-6 months in corrections later.

Who Takes Part in the Selection Decision?

The decision must be collective, disciplined, and transparent. Each evaluator records their scores independently before any group discussion.

Role	What they evaluate
CEO, CXO's, Business Unit Heads	ROI, strategic alignment, budget feasibility
CMO / VP Marketing	Strategy, team fit, creative quality, measurement logic
Marketing & Communications Teams	Delivery discipline, speed, day-to-day management quality
Sales & Business Development	Marketing-to-Pipeline link, MQL/SQL understanding, sales cycle
Procurement & Legal	Contractual terms, compliance, pricing, exit clauses

Golden rule: Whoever participates in the decision owns the outcome. If one person decides alone, every downstream problem is theirs alone, and most managers do not want that burden.

The Real B2B Understanding Test

"We run LinkedIn" does not mean "we understand B2B"

Many agencies say "B2B" and mean managing LinkedIn, designing pitch decks, and producing generic content. That is not enough. An agency that truly understands B2B:

- ◆ Understands long sales cycles and the difference between MQL, SQL, and Pipeline Contribution
- ◆ Knows how to extract technically deep content from the company's internal experts
- ◆ Has documented B2B experience with results - not just "a nice-looking picture"
- ◆ Produces whitepapers, case studies, and thought leadership
- ◆ Has worked inside structured procurement environments and understands approval mechanics

Rule before presentation day: Request the Pitch Deck from each agency at least two days in advance. Hold an internal session to read it, extract strengths and weaknesses, and prepare pointed questions. This turns the presentation from "a screening" into "a peer dialogue." An agency that refuses to share its deck in advance under the pretext of "protecting ideas" = red flag.

Red Flags - What Halts the Decision

The ten signals below are grounds for elimination. **One signal** halts the decision for review. **Two signals** end the negotiation entirely.

1 A contract before a Pilot

They demand an annual contract before any pilot. Serious agencies accept a fixed-scope pilot.

2 Cosmetic reports without measurement

Engagement without pipeline, reach without revenue. They sell you impression, not impact.

3 No comparable B2B portfolio

All case studies are B2C or FMCG. Long sales cycles demand an entirely different expertise.

4 Promises without methodology

Big results with no documented steps. The serious agency explains how, not just how much.

5 Sales team ≠ delivery team

Classic team-substitution scam. Demand the name and title of whoever will actually work on your account.

6 They did no research on you before the meeting

They walked in with no knowledge of your industry or challenges. Early laziness only compounds after signing.

7 Ambiguous authority

Who signs? Who approves? Absence of an internal decision structure leads to silent Scope Creep.

8 A relationship without a point of contact

No named Account Manager. You contact "the team." The team doesn't respond.

9 AI as a slogan without detail

"We use AI" without specifying which tools and how the lower costs are reflected in your price.

10 Vague or absent measurement

No KPIs tied to the business, no detailed dashboard. You are buying effort, not outcomes.

One signal = halt the decision for review · **Two signals** = end the negotiation entirely

The Saudi Regulatory Framework - Pre-Qualification Requirements

Requirement	What it means in practice
GAMR license General Commission for Audiovisual Media	A prerequisite for producing any commercial audiovisual content. An agency without the license = illegal production.
PDPL Personal Data Protection Law, 2024	Require a DPA (Data Processing Agreement) within the contract. Define what data, how it is stored, and when it is destroyed.
Verified influencer system	Every paid influencer placement requires a separate license. The agency is responsible for verification.
Etimad government platform	For government work: confirm the agency is registered + require a local content percentage clause in the contract.
60% Saudization Effective from 19 January 2026	Scope: establishments with 3+ employees in marketing professions. Minimum wage: SAR 5,500 monthly. A parallel decision for sales: same percentage, same date.

The ten covered professions: *Marketing Manager, Advertising Manager, Advertising Agent, Marketing Specialist, Advertising Specialist, Public Relations Specialist, Public Relations Manager, Graphic Designer, Advertising Designer, Photographer.*

Why it matters to you as a client: The Saudi team understands cultural context and dialect, **understands religious and national occasions with awareness of Saudi cultural diversity** across regions and segments. For government work, local content is an independent requirement. An agency with an entirely foreign team = a regulatory risk that transfers to you.

Source: Ministry of Human Resources, 2026.

Legal and Regulatory Checklist

Before signing with any agency, ensure your legal department has verified the following items. The list is indicative; your final reference is your own legal counsel.

Group 1 • General legal

- Commercial Registration valid and covering the actual activity (not outdated, not in breach)
- Zakat and Income Tax certificate valid
- Social insurance (GOSI) current for the employees assigned to the account

Group 2 • Regulatory and sectoral

- GAMR license valid (for commercial audiovisual content)
- Registered on Etimad (for work with government entities)
- Influencer licensing (if the scope includes influencer campaigns)
- Saudization rate achieved: 60% in marketing professions (for establishments with 3+ employees)
- Minimum wage met: SAR 5,500 monthly

Group 3 • Data and contract

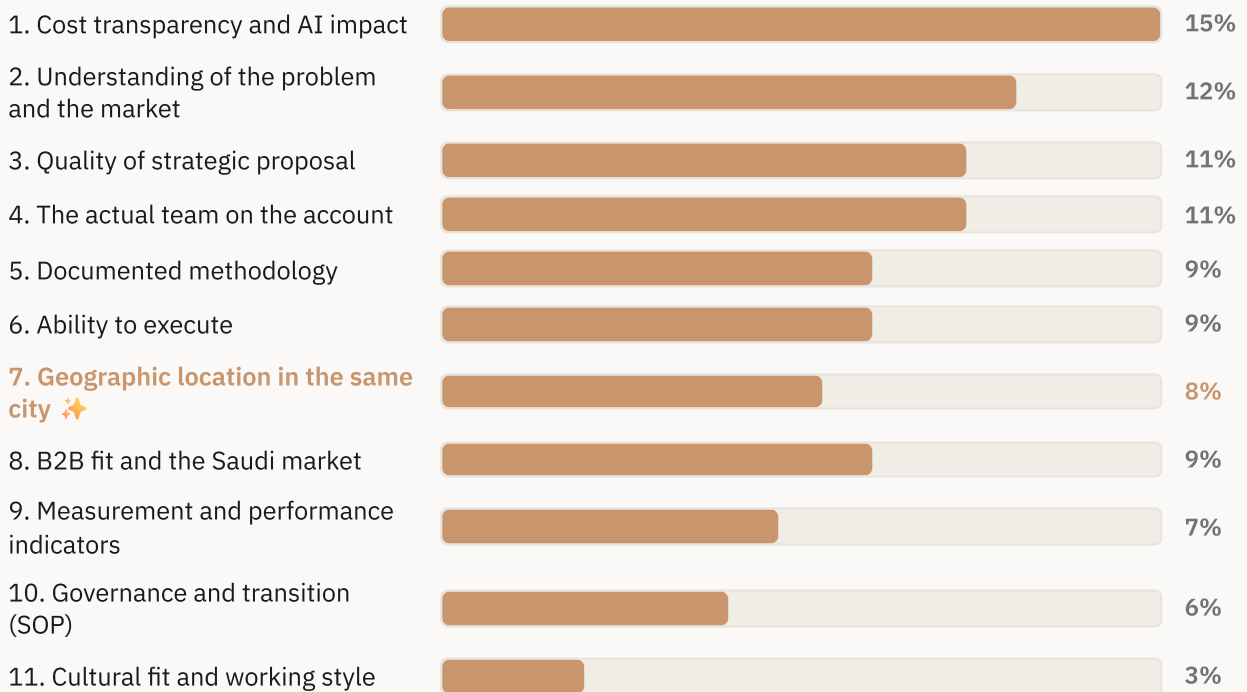
- DPA (Data Processing Agreement) clause included in the contract
- PDPL compliance documented in writing
- IP Assignment clear: deliverables transfer to the client
- Liability Cap defined and reasonable
- NDA signed before the RFP, not after
- Dispute resolution mechanism defined (Saudi courts or arbitration)
- Early termination terms and contractual notice period

This checklist protects you from 90% of common regulatory risks. The most overlooked item in the Saudi market is **IP Assignment**. Without it, creative deliverables remain the agency's property, which means they can reuse them for competing clients.

Agency Scorecard

Eleven weighted criteria to judge before signing

Distribution of weights across the eleven criteria



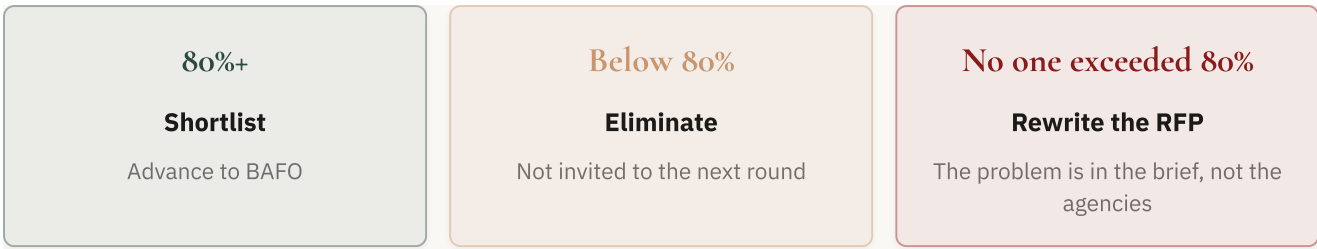
Total = 100% • The ✨ criterion is new in v9.5.3

#	Criterion	What is measured	Weight
1	Cost transparency and AI impact	Itemized pricing by hour and role. Named team members. How has AI savings been reflected in your price compared with last year? (See Rubric #1)	15%
2	Understanding of the problem and the market	Did they research you before the meeting? Did they understand your commercial challenge, or just present their services? (See Rubric #2)	12%

#	Criterion	What is measured	Weight
3	Quality of strategic proposal	Detailed thinking on your problem, or a canned template ready for any client? (See Rubric #3)	11%
4	The actual team on the account	Who will work daily, by name and title? Full-time staff or freelancers? Years of experience? (See Rubric #4)	11%
5	Documented methodology	Phases, deliverables per phase, approval points, tools. Not the word "Brief" in a deliverable slide. (See Rubric #5)	9%
6	Ability to execute	A detailed timeline (Gantt), delivery milestones with dates, an escalation plan for delays. (See Rubric #6)	9%
7	Geographic location in the same city ✨	An agency in the same city as the company guarantees in-person meetings within 24 hours, no flights required. An operational reliability factor, not a luxury. (See Rubric #7)	8%
8	B2B fit and the Saudi market	Do they understand long sales cycles? Government procurement? The local context? (See Rubric #8)	9%
9	Measurement and performance indicators	KPIs tied to the business, a detailed dashboard - or are they selling you impressions and engagement? (See Rubric #9)	7%
10	Governance and transition (SOP)	Documented SOP: who approves and in how many days. A written SLA. A documented transition plan + an escalation mechanism. (See Rubric #10)	6%
11	Cultural fit and working style	Do they push back thoughtfully when warranted? Or do they agree with everything? (See Rubric #11)	3%

Why "Geographic location" is a standalone 8% criterion. An agency in the same city as the company guarantees in-person meetings within 24 hours without a flight. Prior experience with out-of-city agencies revealed daily coordination friction, particularly during airline disruptions. This is an operational reliability factor, not a luxury.

Reading the Score



Note on the 80% threshold: This is a relative number, not a fixed rule. Mature companies in FMCG and telecom may treat it as a minimum. Small and mid-sized companies may find 70-75% sufficient to start a partnership. The real standard is not the absolute number; it is the consistency with which you apply the weights across competing agencies. The goal is fair comparison, not a magic number.

Note on impact: The right partner agency raises marketing productivity by 5 to 15 percent of total marketing spend. **Source: McKinsey.**

Outside the weights: References and the Chemistry Visit. The second evaluation after BAFO (see the "Professional Selection Path" page).

How to Score Each Criterion - Scoring Rubrics

Observed behavior, not impressions. The four columns are scores: **5 Excellent**, **3 Acceptable**, **2 Weak**, **1 Reject**.

Criterion	Weight	5 Excellent	3 Acceptable	2 Weak	1 Reject
1. Cost transparency and AI impact	15%	Itemized by hour/role/name. YoY cut tied to AI.	Phase breakdown. AI mentioned without price impact.	Lump-sum only. AI as marketing claim.	Refuses disclosure. Claims without evidence.
2. Understanding of problem and market	12%	Self-directed research pre-meeting. Reframes brief sharply.	Reads brief carefully. Substantive questions.	Echoes brief. Generic Saudi familiarity.	Arrives unread. Pitches services.
3. Quality of strategic proposal	11%	2-3 options with trade-offs. Tied to KPIs.	Mostly bespoke. Sound rationale.	Templated. Generic frameworks.	Recycled. "Run campaigns on X."
4. The actual team on the account	11%	Daily contributors named with exp + %. 60% Saudization.	Key roles named. Mostly full-time.	Pitch team only. Mix not disclosed.	Pitch team won't deliver. "Will assign someone."
5. Documented methodology	9%	Doc with phases + gates. Applied 3+ times.	Phases stated. Tools named.	Slide bullets only. No process.	"We do agile" - no specifics.
6. Ability to execute	9%	Detailed Gantt with owners + deps. Escalation matrix.	Phased timeline with milestones.	High-level only. "We'll let you know."	Refuses dates. No timeline.
7. Geographic location in same city 📍	8%	Office in your city. 24-hour in-person.	Same metro. In-person feasible.	Different city. Monthly visits only.	Outside KSA. Quarterly visits.
8. B2B fit and the Saudi market	9%	B2B portfolio with cycle + pipeline data. Saudi enterprise refs.	B2B mixed with B2C. Limited Saudi refs.	B2C-heavy. "Same with bigger budgets."	No B2B. Doesn't know Etimad / regulators.
9. Measurement and KPIs	7%	KPIs tied to pipeline + CAC. Dashboard with CRM.	Mix of pipeline + channel metrics.	Reach / engagement as primary.	Vanity metrics. Resists pipeline.
10. Governance and transition (SOP)	6%	Documented SOP + written SLA + DPA.	Generic SOP. SLA in proposal.	Verbal commitments only.	Refuses written SLA. Compliance gaps.

Criterion	Weight	5 Excellent	3 Acceptable	2 Weak	1 Reject
11. Cultural fit and working style	3%	Constructive disagreement with evidence. Respects context.	Agrees mostly. Occasional concern.	Agrees with everything.	Sycophantic. Or: dismissive.

When and How to End the Agency Relationship

The agency relationship is an operating contract, not a marriage. The hardest decision is not when to start; it is when to exit. Global playbooks teach you how to choose an agency, but they go silent on how to leave one. This page fills that gap.

The Four Exit Signals

Signal	Detail
1. Performance	Three consecutive quarters without hitting 70% of agreed KPIs. Continuous underperformance is not an accident.
2. Team	The core account team has changed more than once in a year without prior notice or a convincing explanation. That is a signal of internal trouble.
3. Communication	Recurring response delays (more than 48 hours on urgent items). Meetings postponed without justification. Weak documentation and follow-through.
4. Value	The invoice grows while deliverables shrink or decline in quality. Price rises without a matching improvement in output.

The Steps of a Professional Exit

1. A documented candor session: Hold a formal meeting, put the issues on the table in plain terms, and grant a 60-day window for improvement. Document everything in writing.

2. A written improvement plan: Require a plan from the agency with specific, measurable indicators. Make the review weekly through the 60-day window.

3. A decision on day 60: Either a conditional extension for one more quarter with close monitoring, or a formal termination notice.

4. Asset handover within 30 days: On termination, request in writing: all raw files, platform accounts (Social, Ads, Analytics), passwords, completed and in-progress IP, and operational documentation.

Before blaming the agency, ask yourself: did I plan the exit from day one? A contract without clear exit terms = operational lock-in. Ask your lawyer to insert termination clauses before signing, not after a crisis hits.

PART 2

Execution

How to move from reading to application.

How to Use This Pack

This pack is designed to be used as a working tool, not a single read. Enter at the stage that fits your project.

1

Before issuance

Use the Readiness Card in Chapter 1 to confirm you are ready to issue an RFP now.

2

Building the agency list

Use the Agency Map and the diagnostic framework to assemble a 3 to 5 vendor short list.

3

Issuing the request

Open the RFP Word file, customize it, send to your short list. Confirm mandatory gates.

4

Evaluation

Open the Weighted Scorecard Excel. Enter scores per vendor, read the automatic verdict.

5

Final stage

Send the BAFO request, then run a chemistry visit. Before signing, walk through the Saudi Compliance Checklist.

6

After contract

Monitor deliverables against the agreed SLA. Make periodic GO or NO-GO decisions.

Applied Case: A Cloud Company Selects Its Agency in 10 Weeks

Anonymized case; the slices reflect documented reality from the Saudi market. The numbers are representative, the sequence is actual.

Sector: B2B cloud services

Size: 60 employees, revenue SAR 40-60 million

Challenge: A strong technical product but weak market share

Context: A prior agency relationship had ended in disappointment

Step	What happened
1. Self-diagnosis	The company applied the Readiness Card. Result: 6 Yes out of 10. Clear gaps in Brand Guidelines and RACI.
2. Failure framework	The internal review revealed that the prior relationship was Q3 (Client-Owned Failure): a vague brief + multiple decision makers.
3. Partner type	After addressing the internal gaps (4 weeks), decision: a specialized digital agency with ICT B2B experience, not a full-service agency.
4. Long List	Desk research across 14 agencies: 9 local + 5 regional. Eight were eliminated for lack of specialization fit.
5. RFI	Six agencies responded. Narrowed to 4 based on team size and sector experience.

Step	What happened
6. RFP + Pitch	The four agencies submitted proposals. Scorecard evaluation: three exceeded 80%. One fell at 72%.
7. BAFO	The top three received written technical feedback. They submitted refined proposals within 10 days.
8. Chemistry Visit + references	Office visits to the top two. Reference calls with 3 clients per agency. Agency (A) came out ahead operationally despite close scores.
9. Signature	An annual contract worth SAR 1.8 million. An initial fixed-scope Pilot phase at SAR 300K, with a clear exit clause thereafter.
10. After 3 quarters	Measurable improvement across 4 indicators: brand presence in B2B channels, MQL quality, marketing contribution to pipeline, and delivery speed.

What the Company Learned

Lesson 1: Success is not finding the perfect agency; it is building a repeatable process.

Lesson 2: BAFO exposed a substantive gap that did not surface in the Pitch. Agency (B) was the strongest creatively but the weakest operationally.

Lesson 3: The Chemistry Visit saved the selection. Scores were close, but the human interaction revealed the difference.

Lesson 4: The fixed-scope Pilot created a credible, safe exit if the relationship had not worked. An annual contract without a Pilot = lock-in.

A Good Playbook Does Not End With Reading

It ends with a better decision

- 1 Do not start with "Who is the best agency?" Start with "What problem are we trying to solve?"
- 2 Don't buy a name; buy fit for your specific problem.
- 3 Don't sign a full year before testing ninety days first.
- 4 Don't leave the agency to work alone without a real internal owner.
- 5 Don't let Procurement drive the marketing decision alone.
- 6 Ask the agency: "How did AI cut your costs? And how is that reflected in my price?"
- 7 Make the decision collective, disciplined, and transparent.

And the most important point:

Sometimes the best decision is not to choose an agency,
but to fix your own house first.

Turn to the next page - 90 minutes start now.

The First 90 Minutes

Five defined tasks, 90 minutes in total - turning you from a reader into an operator.

Task 1 · Open Excel and build a Scorecard for your company

15 minutes

- Copy the 11 criteria from pp. 30-31
- Adjust the weights to your priorities (if needed)
- Add a tab for every prospective agency

Task 2 · Fill out the RACI Matrix

20 minutes

- Final decision maker: (name)
- Executive owner: (name)
- Advisors: (names)
- To be informed: (names)
- Share it with the team in a single email

Task 3 · Write a Brief of only two pages

30 minutes

- Page 1: the problem, the audience, the measurable objective
- Page 2: the budget, the timeline, the constraints
- Do not exceed two pages. A short Brief attracts serious agencies.

Task 4 · Send an RFI to 8-12 agencies from your list

15 minutes

- Use the Desk Research framework (p. 22) to rank them
- Expected response window: 5 days
- Don't wait for everyone to respond; follow up after the deadline

Task 5 · Block the timeline for the next 10 weeks

10 minutes

- Preparation: two weeks (closed out by tasks 1-4)
- Long List: one week
- Short List + Pitch: three weeks
- BAFO: two weeks
- Decision: one week
- Put the weekly review meetings on the calendar now

Total: 90 minutes on Monday morning. By end of week one: RFP Draft + Shortlist + timeline. This is the difference between a reader and an operator. You are now on the right path.

Top 15 Terms

Essential vocabulary for the agency-selection path.

Scorecard / بطاقة التقييم

11 weighted criteria (total 100%). Shortlist threshold 80%.

Scoring Rubric / مؤشر سلوكي

Each criterion translated into observable behavior on 4 levels (1-2-3-5).

BAFO / BAFO

Best and Final Offer. Revised proposal request post-pitch.

PDPL / PDPL

Saudi Personal Data Protection Law. SDAIA is the regulator.

Mawthooq / موثوق

GAMR license for influencer advertising in Saudi Arabia.

Nitaqat / Saudization / النطاقات / السعودية

Workforce classification system. 60% Saudization for marketing roles since 19 January 2026.

SQL / MQL / MQL / SQL

Marketing Qualified Lead / Sales Qualified Lead.

Chemistry Visit / Chemistry Visit

On-site visit to assess cultural fit and working style pre-decision.

Mandatory Gates / بوابات إلزامية

Compliance items. Failing any one disqualifies before scoring.

RFP / RFP

Request for Proposal. Sent to agencies on the long list.

RACI / RACI

Role matrix: Responsible / Accountable / Consulted / Informed.

DPA / DPA

Data Processing Agreement under PDPL.

Etimad / اعتماد

Saudi government procurement platform. Mandatory for public-sector scope.

Pipeline / Pipeline

Sales opportunities convertible into contracts. The primary B2B metric.

Team Substitution / استبدال الفريق

Replacing the named pitch team after contract signing. Common red flag.

PART 3

Template Briefs

Briefs only - full body in separate files.

Request for Proposal (RFP)

Linked file

Included in the companion toolkit

What it is

An invitation document sent to agencies on the long list. Defines the challenge, scope, budget, timeline, and the 11 evaluation criteria.

When you send it

After the Readiness Card, agency map, and need-an-agency decision. Send to 8-12 agencies, not more.

What it contains

- 11 sections from issue details to single point of contact
- Full Saudi regulatory requirements (PDPL, GAMR, Etimad, Saudization)
- Evidence pack required from agency
- AI governance and prompt ownership clauses
- **Does not ask for agency revenue or profitability.**

Customization note

This file is customizable based on organization size, sector, and project type. Adapt it; do not use verbatim.

Best and Final Offer (BAFO)

Linked file

Included in the companion toolkit

What it is

A revised proposal request sent to 2-3 short-listed agencies after pitch sessions. Identifies gaps in the initial proposal and requests they be addressed.

When you send it

Immediately after pitch sessions, before the chemistry visit and reference checks. Submitting a BAFO does not mean winning - it is a request for improvement.

What it contains

- Strengths of initial proposal + areas to develop
- Technical questions for written response
- BAFO delta matrix (changed items + justification)
- BAFO certification clause + named-team table with substitution protocol
- Final commercial table - prices that flow into the SLA

Customization note

This file is customizable based on pitch outcomes and initial-proposal gaps. Each case has its own context.

Quick Reference Cards

11 Weighted Criteria

Cost transparency and AI impact (15%); Understanding of the problem and the market (12%); Quality of strategic proposal (11%); The actual team on the account (11%); Documented methodology (9%); Ability to execute (9%); Geographic location in the same city ✨ (8%); B2B fit and the Saudi market (9%); Measurement and performance indicators (7%); Governance and transition / SOP (6%); Cultural fit and working style (3%).

7 Mandatory Gates

PDPL DPA · 60% Saudization · Mawthooq license · Etimad registration · NCA Cloud Controls · Min 80 score · Reference verification.

BAFO Rule

Price reduction alone is not BAFO. BAFO = specific commitment framework with measurability + SLA + entitlements.

Periodic GO / NO-GO

The pilot phase is not a wait. Periodically: check ALERTs + check LATE + check Acceptance Date + GO/NO-GO decision.

Five Common Red Flag Examples

Team substitution after signing · pitch theater · missing knowledge transfer · budget overrun without justification · compliance bypass.

Closing · Implementation Toolkit

You have completed the Playbook.

The next step is execution tools.

The working tools are included in:

For the latest editions, additional resources, and related publications, visit:

albishi.net/get-templates

For executive marketing inquiries:

ismail@albishi.net