

**APPENDIX C**  
**AGENCY QUESTIONNAIRE**

- I. Organization Ownership and Key Employees
  - A. When was your agency founded?
  - B. Who owns your agency?
  - C. Who controls the management of your agency?
  - D. Please identify the most important executives in your agency, and provide a short one-paragraph description of each of their careers. What do they do now in your agency?
  - E. Is there anything else you would like to tell us about the ownership of your agency or its key employees?
  
- II. Agency Organization and Service
  - A. Provide a functional organization chart for your agency. (It is not necessary to indicate names)
  - B. How many staff including owners and executives does your agency have?
  - C. Please describe how your agency provides service to a typical client. If possible, provide a functional account organization chart indicating contact points between agency and client.
  - D. Is your organization a full service agency? What services does your agency provide? What services does your agency rely on individuals or firms outside of it to perform?

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- E. Please describe the function of your account management. How does it interact with a typical client? What are its specific responsibilities within the agency?
- F. Please describe your creative department. How would you characterize its strengths? To what extent and under what circumstances are representatives of the creative department in direct contact with your clients?
- G. Please describe your media department. How would you characterize its strengths? To what extent and under what circumstances are representatives of your media department in direct contact with your clients?
- H. Please describe your research department. How would you characterize its strengths? To what extent and under what circumstances are representatives of your research department in direct contact with your clients?
- I. What capabilities does your agency have in direct marketing, web site development and promotion, digital ads, launching new services, media placement, and the formulation of marketing strategies?
- J. When your agency is awarded a new account, does it typically staff it from within, or do you also augment internal staffing with professional people newly hired from outside the agency?
- K. Which staff members would handle our accounts?
- L. Would any tasks or activities for Public Works and Utilities be subcontracted to individuals or companies outside the agency? If so which ones, and who would do the work?

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M. Please provide any additional information you wish to include regarding your agency's organization and how it serves its clients.

III. Top Management Participation

A. How does the owner or chief executive officer maintain contact with your clients?

B. Does the owner or chief executive officer participate directly in the professional conduct of any client advertising programs? Which clients?

C. Who (by title) is the senior agency executive responsible for the professional conduct of other agency accounts?

D. Please provide any additional information you wish to include regarding the participation of your top management in account services.

IV. Account Gain and Loss History

A. What accounts has your agency lost in the past two years?

B. If you have lost accounts within the past two years, why they were lost?

C. What accounts has your agency gained in the past two years?

D. If you have gained accounts within the past two years, why do you believe your agency was chosen to service these new accounts?

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E. Please provide a list of your accounts as of November 1, 2011 and as of November 1, 2015.

F. Does your agency handle any accounts for companies that directly compete for energy customers of the Duluth Public Works and Utilities Department? If so, please provide a list of those clients. What is the nature of those accounts and what services do you provide?

G. Please provide any additional information you wish to include regarding your account gain and loss history.

V. Agency Financial Standing and Policies

A. How would you characterize your balance sheet?

B. How do you usually charge your clients for your services? Please include an explanation of your compensation philosophy, a schedule of hourly rates, your mark-up structure and fee/commission structures.

C. Do you have an internal time-cost accounting system? If so, what has been your experience with the system?

D. Approximately what proportion of agency internal time is charged against client accounts and what proportion is charged against general management, general overhead, and/or unallocated direct salary expense?

E. We would be interested in any comments that you wish to make about your credit rating, your media payment policies, whether you consistently earn cash discounts, etc.

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F. About how many days on average do client media bills remain outstanding after the media invoice is issued? 30 days, 60 days, 90 days, over 90 days?

G. What was the approximate value of all media purchased for clients in 2015? Please provide a breakdown by the type of media purchased in 2015 (e.g. TV 20%, Print 15%, Digital 15%, Radio 30%, Bill Boards 10%, Special Events 10%, etc.).

H. Please provide any additional information you wish to include regarding your agency's financial standing and policies.

VI. Agency Views about Effective Advertising

A. How would you describe effective advertising?

B. Does your agency have any specific philosophy or practices that you believe consistently produce effective advertising?

C. Does your agency follow any procedures to maintain the effectiveness of the advertising you produce on an account-by-account basis?

D. Please provide any additional information you wish to include regarding your agency's views about effective public information communications and how it might best be obtained.

VII. Agency Experience

A. In general, how would you characterize the experience of your agency? With what kinds of accounts do you believe your agency has special expertise?

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- B. What agency experience, if any, is directly related to the products or services which we are now searching for an agency?
- C. What other agency experience, although not directly relevant, do you believe might provide useful background if you were to be awarded the public awareness agency account for ComfortSystems?
- D. What advantage would your firm provide to Public Works and Utilities versus other firms?
- E. Does your agency as a whole, or any of the individual staff, have any experience in developing public awareness strategy and tactics for firms in recently deregulated industries such as trucking, banking, airline, telephone, or energy? If so, please describe the nature of that experience.
- F. Please provide any additional information you wish to include regarding your agency experience.