

# 2021 RSW/US

## New Year Outlook Report:

### Turning The Page



*Trends and predictions for 2021,  
based on a survey of both marketers  
and marketing service firms.*

## February 8-11th, 2021

1pm-3:30pm Each Day

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**A new conference experience, for a changing agency new business landscape.**

*Additional highlights and agenda on [page 22](#)*

Never before has there been a conference that brings together as much frontline perspective from senior level marketers, leading independent agency new business directors, and the new business team at RSW.

Only RSW has the benefit of working directly with marketers on the RSW/AgencySearch side of its business, helping them find better marketing agencies.

And only RSW has the benefit of working directly with agencies on the RSW/US side of its business, helping them manage winning new business programs.

Combined, this experience puts RSW in a unique position relative to others in the industry. Through our RSW/US and RSW/AgencySearch businesses, we have access to and insights from marketers and agencies. Because we see both sides of the fence, we have a real "Look Under the Hood" perspective that is unmatched in the industry.

Join us for what will be an insightful, helpful, and exciting Agency New Business Conference!

# TABLE OF CONTENTS

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Introduction	04
About The Report	05
<b>I. Investment in Non-Marketing Activities</b>	<b>06</b>
<b>II. A Retreat From In-House Agencies?</b>	<b>08</b>
<b>III. Expected Marketing Spending</b>	<b>11</b>
<b>IV. COVID and Digital Ad Spending</b>	<b>12</b>
<b>V. The Importance of Data and Analytics</b>	<b>13</b>
<b>VI. Virtual Trade Shows and Conferences</b>	<b>14</b>
<b>VII. Fewer Agency Partners</b>	<b>15</b>
<b>VIII. How To Win One Of Those Two Agency Assignments</b>	<b>17</b>
<b>IX. Biggest Challenges Facing Marketing Agencies in 2021</b>	<b>19</b>
<b>X. Biggest Challenges Facing Marketers in 2021</b>	<b>20</b>
Conclusion	21



## INTRODUCTION

This study was commissioned by RSW/US. RSW/US is an outsourced lead generation/business development firm that exclusively services marketing service firms (of all sizes and types). RSW/US works with over 50 agencies across the U.S., operating as their outsourced sales and marketing team. RSW/US was founded in 2005.



In 2010, RSW started RSW/AgencySearch. To-date, RSW/AgencySearch has managed over 40 searches for marketers across a range of different categories, helping them find better agencies. The RSW/AgencySearch model is unique to the industry.

The exposure to the agency and the marketer world has armed RSW/US with perspective unmatched in the industry. This perspective is woven throughout this, and every survey report.

To learn more about RSW/US, visit [www.rswus.com](http://www.rswus.com).

To learn more about RSW/AgencySearch, visit [www.rswagencysearch.com](http://www.rswagencysearch.com).

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## ABOUT THE REPORT

The 2021 RSW/US New Year Outlook survey was completed by senior level Marketers and Marketing Agency executives during December, 2020.

The purpose of the survey was to glean insights relative to marketer and agency perspective as they each headed into 2021.

Topics explored included “biggest challenges facing marketing agencies” as seen through the eyes of marketers and agencies. Also probed were topics related to spending and investment expectations, the growth of specialty agencies, the growth of in-house agencies, and the ever increasing importance of data and analytics.

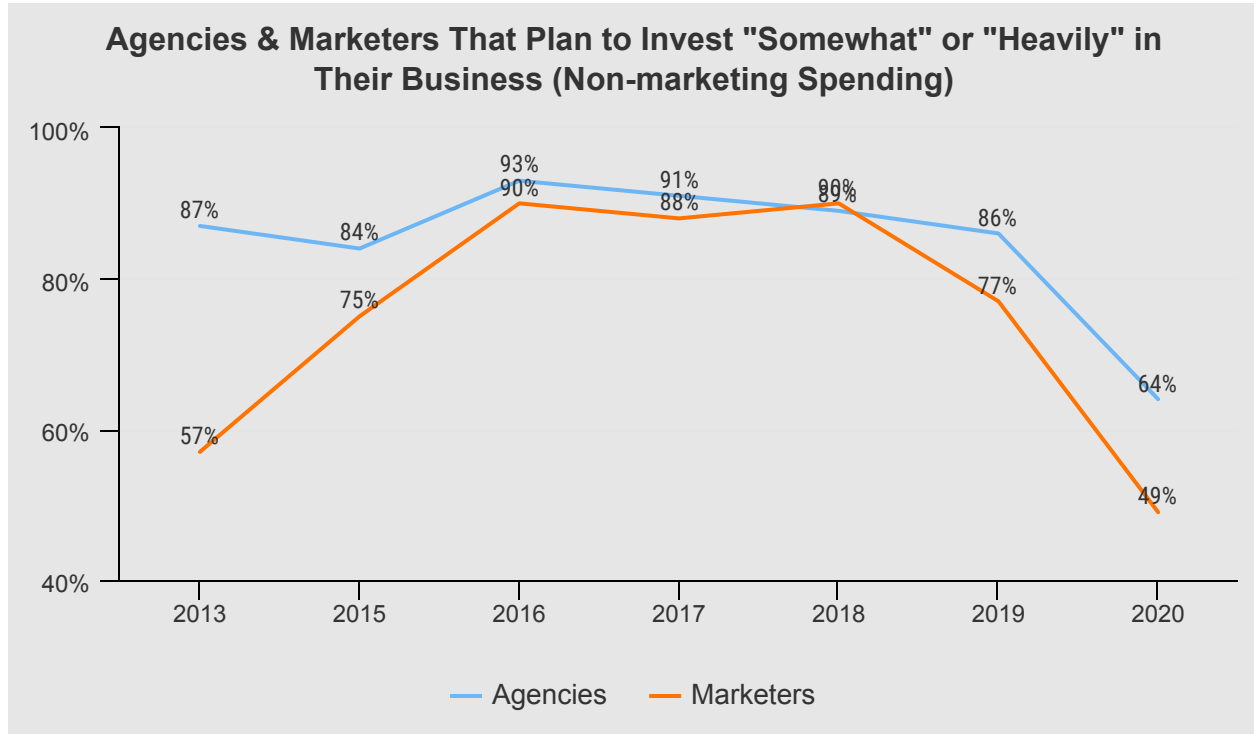
Our hope is the key findings and implications from this study are of value as you kick your marketing and sales planning into gear for 2021.

The agency sample came from the RSW/AgencySearch database of over 5,000 marketing service companies in the U.S. and Canada, ranging in size from under \$5M in capitalized billings to over \$100M. The disciplines of each Agency varied from full service advertising, to digital, to PR, to marketing consultancies.

The marketer sample came from our RSW/US database of 50,000 marketing decision maker contacts. Company size, location, and category varied.

*If you would like to reproduce any of our findings in any format whatsoever, please give either Mark Sneider or Lee McKnight a call (513-559-3101/3111) or email us at [mark@rswus.com](mailto:mark@rswus.com) / [lee@rswus.com](mailto:lee@rswus.com).*

# I. Investment in Non-Marketing Activities



COVID has certainly taken its toll on the enthusiasm among marketers and agencies when it comes to investing in the non-marketing portions of their businesses.

Both marketers and agencies indicate they will be spending at levels significantly lower than they have in each of the last 7 years.

**When looking back over our years of surveying marketers and agencies, the low point for marketers was in 2013, when only 57% stated that they would be “somewhat” or “significantly” increasing their spending on non-marketing activities in the coming year. This year, that number was only 49%.**

Far fewer marketers expect to see increases in non-marketing investment that they have in year’s past.

Same holds true of agencies. In 2016, 93% of agencies stated they would be “somewhat” or “significantly” increasing investment in their business. In the years post-2015, the enthusiasm among agencies for investing in their business steadily increased...until this past year. In 2020, only 64% of agencies expressed higher levels of interest in investing in their business in the coming year, a marked decline relative to years’ past.

## IMPLICATIONS

Lower investment in a marketer's business can potentially mean fewer new hires, less money spent on technology, and fewer dollars invested in R&D, which could slow the pipeline of new product and service launches.

Fewer dollars invested on the agency side can mean much of the same thing.

While this might all seem very concerning, we believe it presents opportunities for agencies.

Marketing staffing cuts could mean marketers will have more of a need to find outside agency help (versus bringing work in-house). As we'll see later, hiring quality staff is no easy task for marketers looking to load up their in-house teams – so agencies can be well-positioned to help out.

And if things like technology investments and new product/service launches are sidelined temporarily, helping your clients and your prospects find creative ways to build their existing business without breaking their bank could prove beneficial to the agency's business.

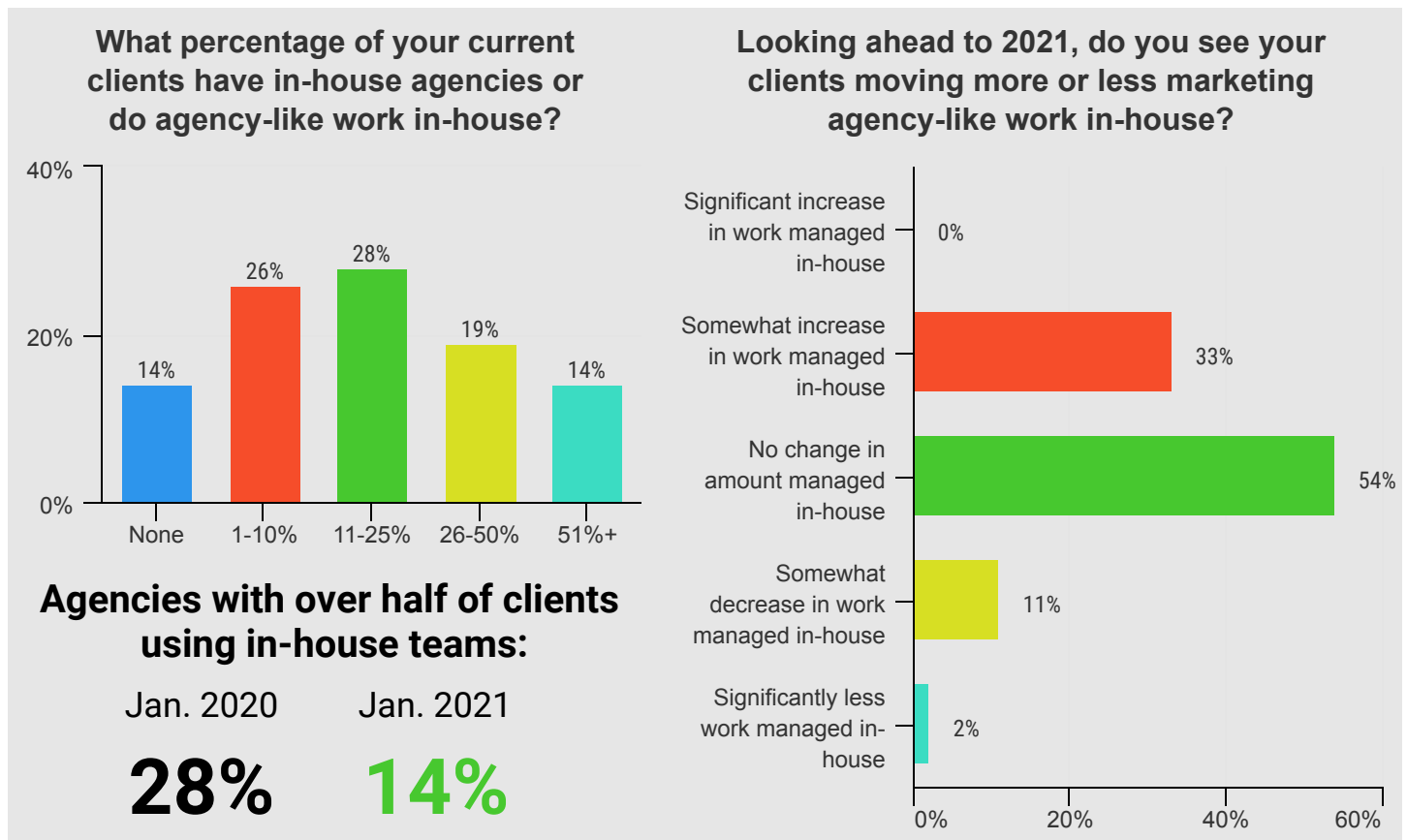
Show empathy for the marketer's situation. Show them how you've helped others in creative ways that could help them. This just might motivate them to engage with your firm for the first time if they are a prospect or motivate an existing client to try something new.

## II. A Retreat From In-House Agencies?

Not exactly a retreat from in-house agencies, but there are signs that managing an in-house team isn't the panacea many marketers thought it would be. It seems that what was an apparent tidal wave of marketers shifting agency activities in-house, could be on a retreat.

Compared to last year, there is significantly less work being managed by a marketer's in-house team than there was in 2020. Only 14% of agencies state that 51%+ of their clients have in-house agencies or do agency-like work in-house. In 2019, 28% of agencies indicated that 51%+ of their clients had brought agency work in-house. A significant reduction in the number of agency clients managing agency-like operations inside.

And as we look forward into the next few years, 67% of agencies expect either no change or a reduction in the amount of work being managed by their clients in-house. 33% do expect "somewhat" of an increase in in-house activity.

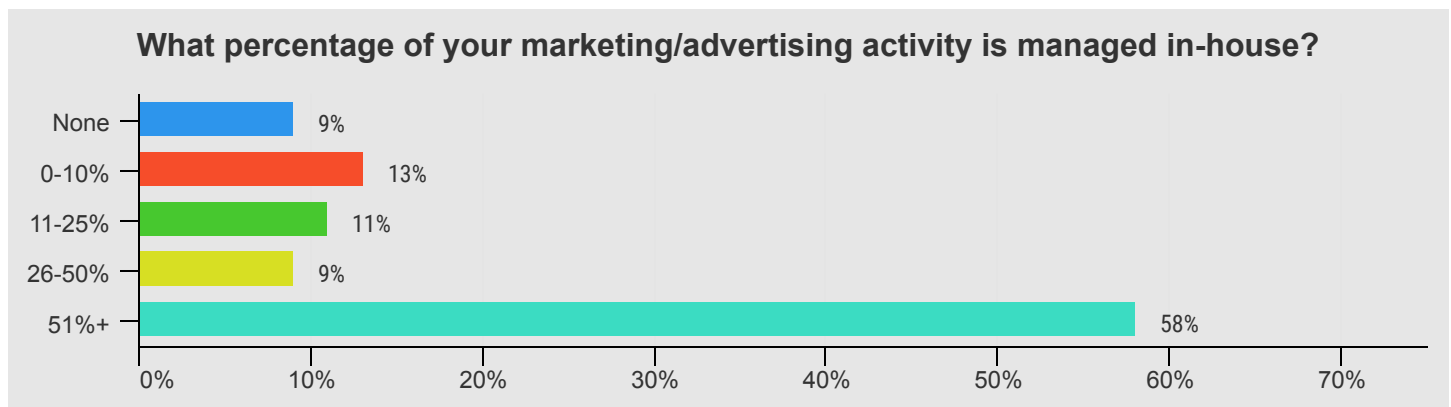




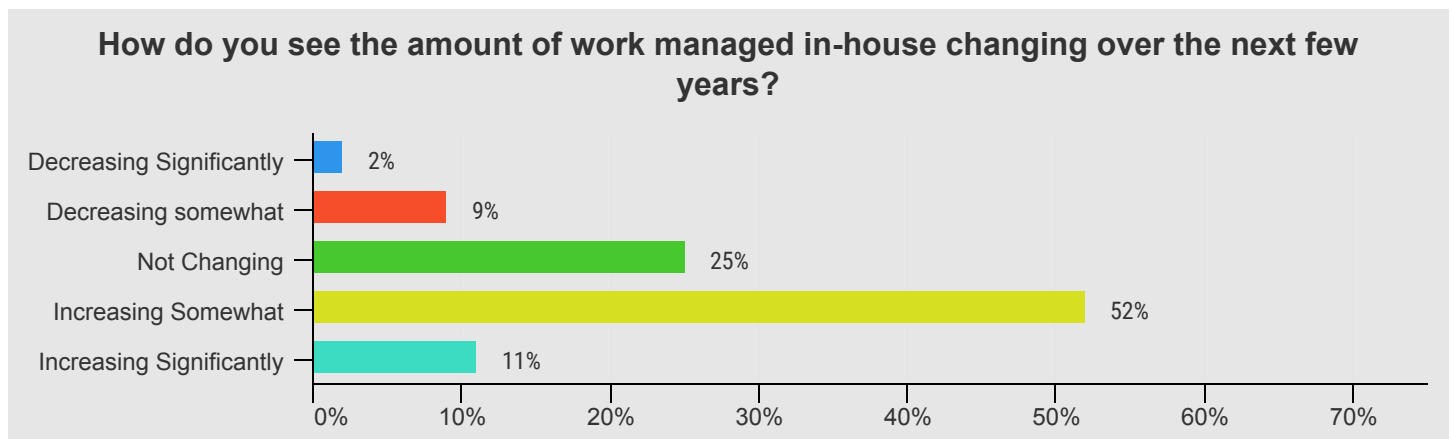
## IMPLICATIONS

While it is certainly good news for agencies that less work is being managed by in-house teams, dealing with in-house agencies is still a fact of life that agencies have to deal with.

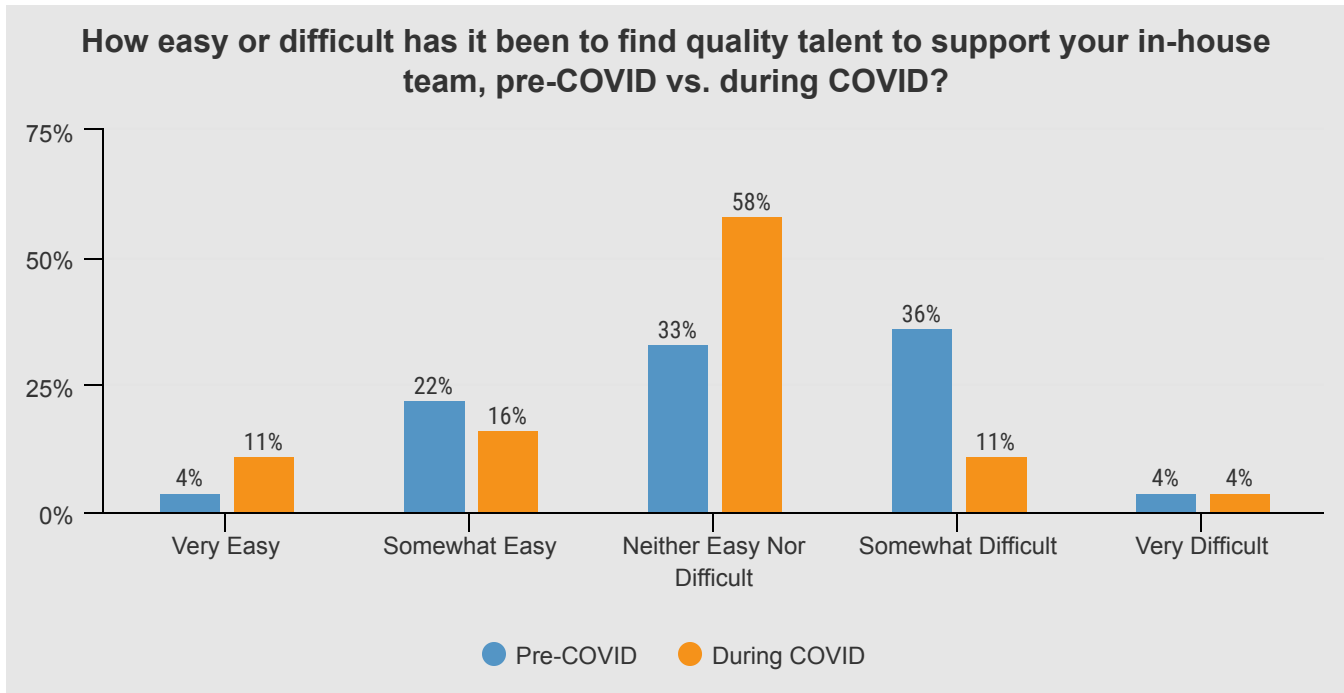
The majority of marketers in our survey noted they do some of their agency work in-house, so it's a phenomenon that hasn't and won't necessarily go away.



But signs do point to continued challenges for marketers trying to do this on their own, despite some marketers (11%) believing they will significantly increase their use of in-house support.



40% of marketers stated that it was either “somewhat” or “very” difficult to find quality talent to support their in-house teams (Pre-COVID). Only 27% stated that during pre-COVID times, hiring quality talent was “somewhat” or “very” easy. During COVID, it hasn’t gotten any easier despite higher unemployment, with only 27% of marketers stating that finding quality talent is either “somewhat easy” or “easy” – so still tough to build a solid team.



Given marketers expect to do far less investing in things like staffing as we roll into 2021, the need for agencies to fill in the gaps and pick up the work their clients (or prospects) may have once managed, will likely get even greater this year.

As you talk with potential prospects, let them know what kind of value you can bring to an existing in-house team, how you work with in-house teams effectively, and how you can manage any project, regardless of size. Letting clients and prospects know your agency is agile and flexible in how it works with clients will make your agency seem like a more inviting partner. The key is getting the door opened. If you’re like many of our agency new business clients, once you get the door opened and you do a solid job, more opportunities will follow.

### III. Expected Marketing Spending

Good news is only 32% of marketers expect to see a decline in their marketing spending levels in 2021. The not-so-good news is that only 41% of marketers expect to see spending “somewhat” or “significantly” increase in 2021.

As we’ll see next, the lower levels of spending expected by marketers in 2021 is likely driven by their increased use of lower cost platforms like digital and social media to drive their business in 2020. They seem (in part) to realize they can do as good a job marketing their business without all the typical high-priced tactics they’ve used in the past.

**58% of agencies believe their clients will “somewhat” or “significantly” increase spending, a level higher than levels agencies have reported in each of the past 4 years.**

We suspect the reason for these projections (relative to their marketing counterparts) is that agencies may be benchmarking off of lower levels of marketing spending that occurred in 2020, believing it will bounce back more significantly than marketers anticipate.



### IMPLICATIONS

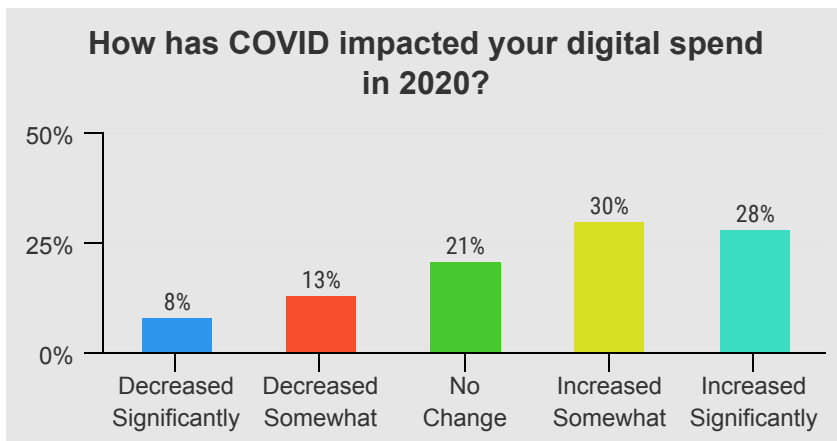
If more marketers are expecting to spend less marketing money, this means that agencies need to get creative in how they service their marketing clients and how they prove their value to clients.

Focusing too heavily on things that an agency would typically focus on during non-COVID periods (e.g. big spending campaigns) and not on things that can more efficiently drive business - like business intelligence, data and analytics, and digital marketing - might not be the best way to show how your agency can be the real difference maker.

## IV. COVID and Digital Ad Spending

Potentially lower levels of marketing spending anticipated by marketers for 2021 is likely the result of their finding new, more cost-efficient ways of reaching their customers and consumers as they worked their way through COVID in 2020.

When asked how COVID impacted their digital spending in 2020, 58% of marketers stated it had increased their use of digital either “somewhat” or “significantly.”



66% of marketers and 85% of agencies expected spending levels in the digital space to increase “somewhat” or “significantly” as we roll into 2021.

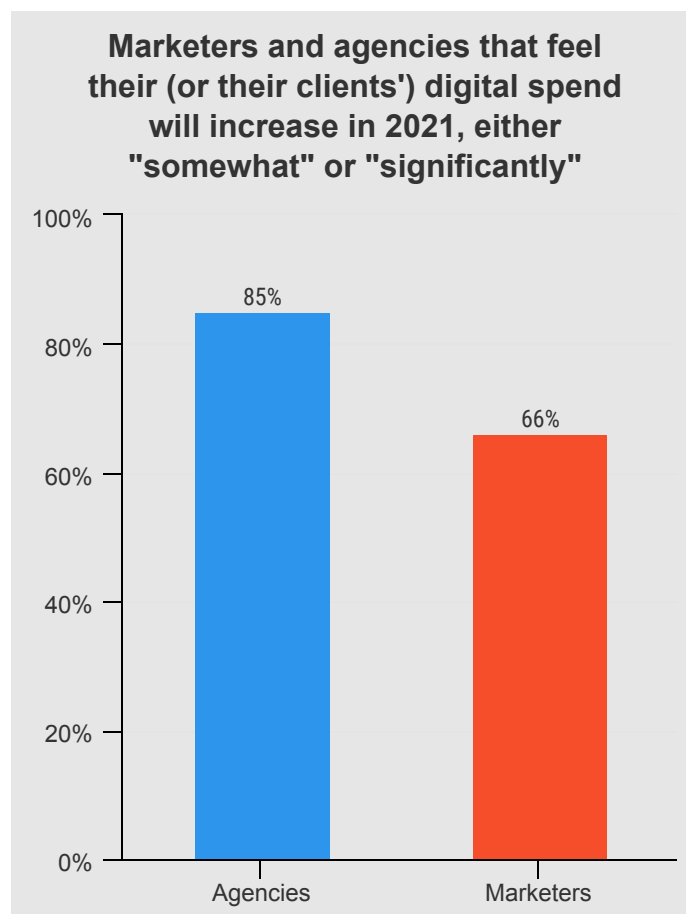
### IMPLICATIONS

As we’ll see later in the report, many of the things we’ve adopted during COVID are likely to stick as we eventually roll out of this global pandemic. Things like virtual conferences aren’t going away. And the adoption of digital media to more efficiently replace broader based, more expensive platforms will only grow in value and importance to marketers.

So, if your client has simply pulled back their spend and hasn’t pushed you to explore new ways of reaching their consumers, you need to step up and help them see the value of different, more targeted media platforms.

And if your agency isn’t equipped to manage effectively in the digital and social space, you either need to invest in the tools/people to do it and/or partner with the firms that can help get you there.

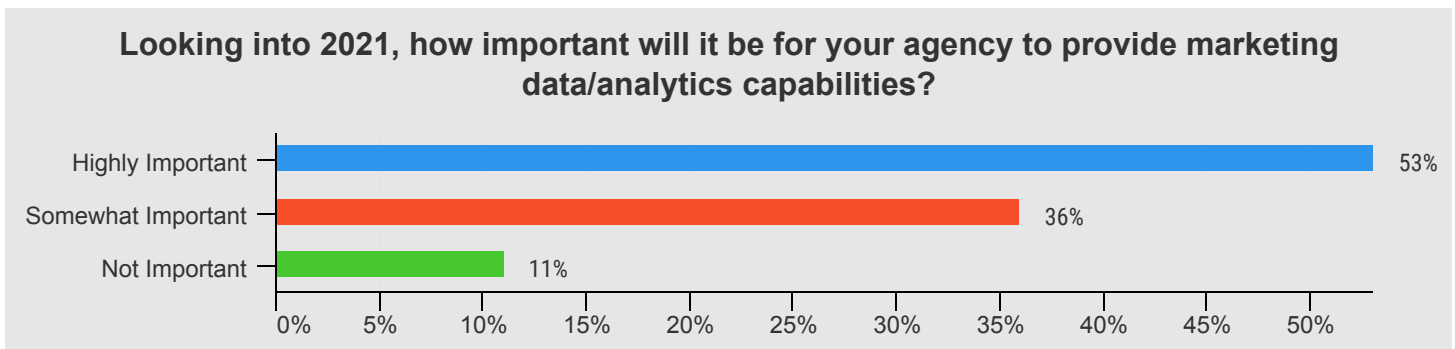
COVID certainly has brought a lot of pain and suffering to the marketing and agency world, but it has also brought opportunity – opportunities that will call for different strategies for the foreseeable future.



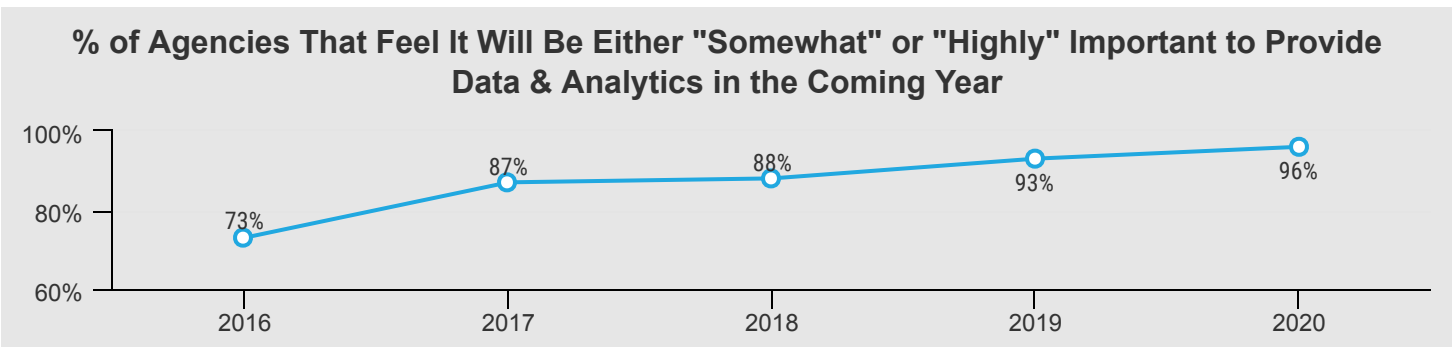
## V. The Importance of Data and Analytics

Doing more (creatively) with less will be the mantra in 2021. And while one would think marketers might be a bit more forgiving, given the situation, their demands remain high for proving the value of their (more limited) spending activity.

89% of marketers stated it was going to be either “somewhat” or “highly” important for their agency to provide data and analytics capabilities.



And 96% of agencies (the highest level since this question was first asked in 2016) believe that it will either be “somewhat” or “highly” important their agency provide data and analytics capabilities in the coming year.



### IMPLICATIONS

We believe we’re at that point now, where data and analytics are a given – whereby marketers expect their agency will provide these capabilities. It’s no longer a question of does an agency have the capabilities or not, it’s a question of the sophistication of their capabilities.

We’re seeing varying levels of sophistication among the agencies we represent on the agency new business side of our business and the agencies that participate in the searches we manage.

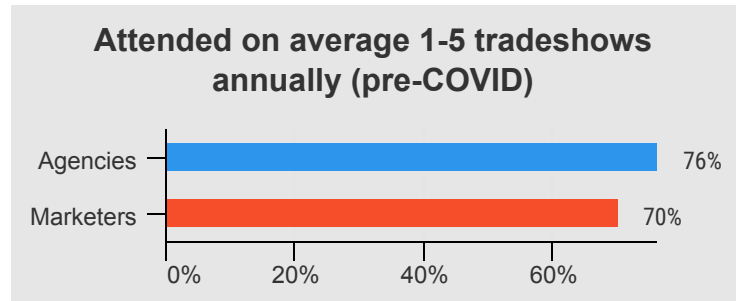
Key for agencies is staying current on what platforms/reporting tools exist and making certain the client is satisfied with the way in which they’re helping them navigate the results and returns on their investments in their marketing programs.

Stay ahead of it. Don’t fall behind.

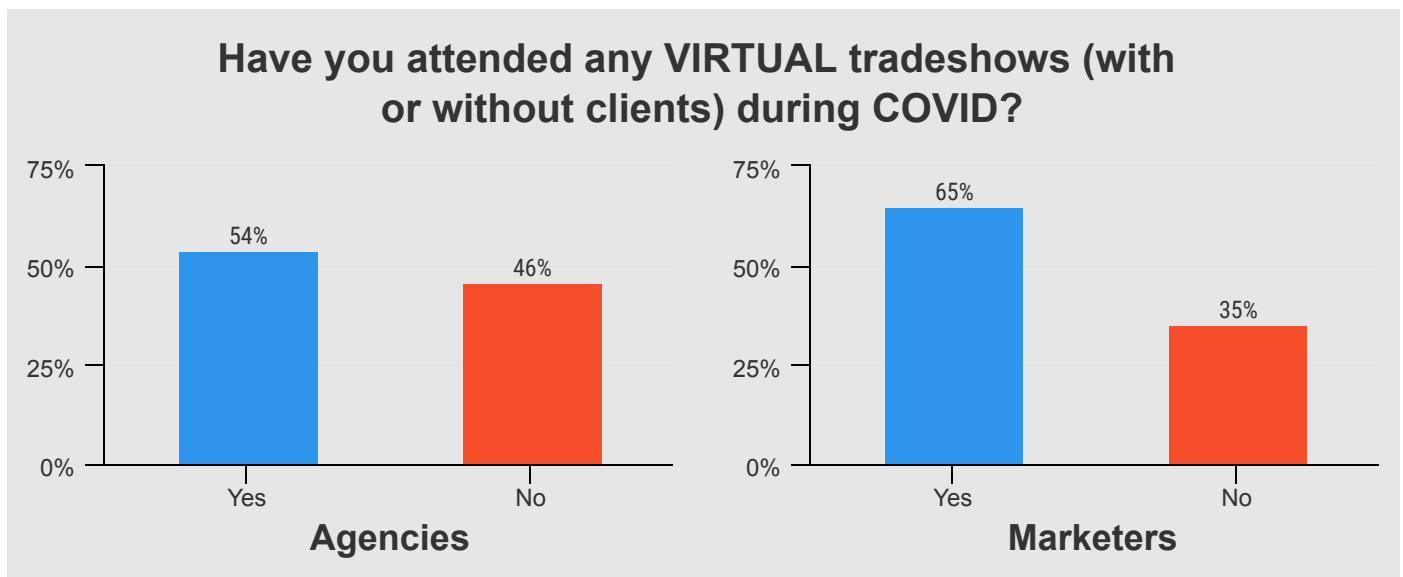
## VI. Virtual Trade Shows and Conferences

One of the other changes we can expect to see when we come out of the pandemic is a reduction in the number of live trade shows and conferences being held and attended.

**70%+ of marketers and agencies** state they attended an average of 1-5 live trade shows and/or conferences annually, prior to the start of COVID.



In addition, a large number of both marketers and agencies took a run at the virtual trade show/conference world, with 65% of marketers and 54% of agencies stating they had attended a virtual show during these past 9 months.



Apparently, the majority of marketers and agencies found enough favor in their experiences with virtual trade shows and conferences that they believe they will remain a staple when COVID has passed. 67% of marketers and 72% of agencies believe virtual shows have proven to have enough value that they will remain part of the lexicon of marketing events as we roll out of COVID this year or next.

### IMPLICATIONS

If virtual shows are here to stay, then agencies need to do a couple of things to help their agencies stay in the game. One, they need to get educated on the virtual conference platforms available and have a point of view when virtual shows surface that their clients are interested in attending.

The other thing agencies need to do is find inventive and creative ways for their clients to take full advantage of virtual shows and conferences.

Simply letting your client “attend” without thinking about how to create the greatest impact and without finding ways to get more “attendees” to want to see your client will make for a less than spectacular event.

## VII. Fewer Agency Partners

In 2015, 50% of marketers stated in our survey they used 2 or fewer agencies to support the needs of their business. In our most recent survey, that number is now 74%.

Since 2015 there has been a steady (and in the last few years, a rather aggressive) rise in the percentage of marketers using a smaller number of firms, primarily for three reasons.

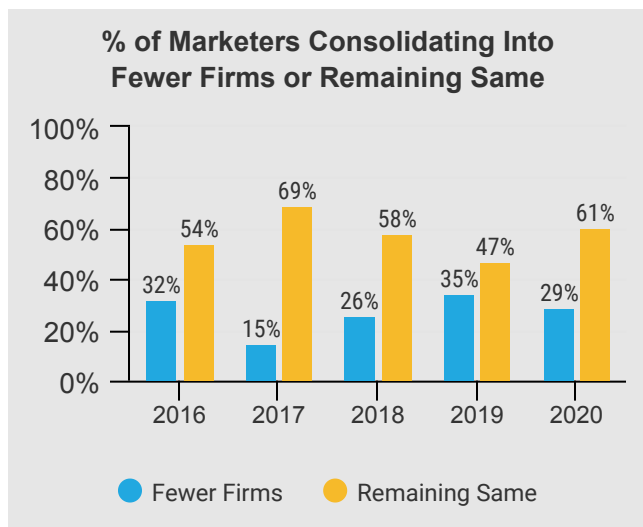
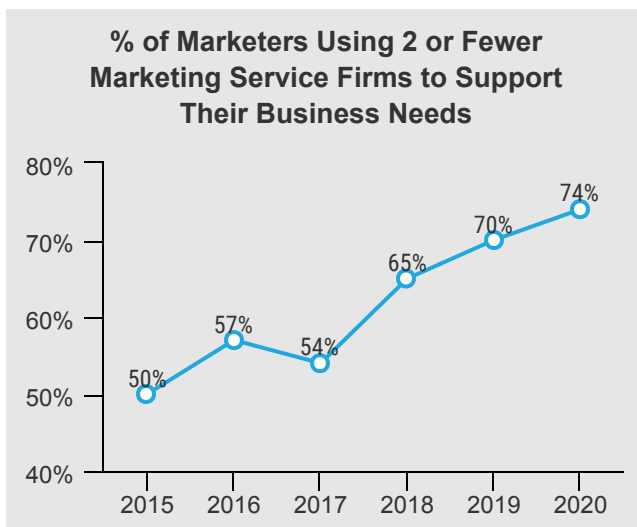
One, is many marketers are trying to minimize the complexity of managing multiple firms. With marketer ranks shrinking (and likely to continue shrinking), marketers have less time to manage multiple firms. It's too time consuming.

The second reason has to do with a client's brand's equity. Having too many agencies makes it difficult to maintain any kind of reasonable consistency of a brand's equity across firms. Limiting the number of agencies that a marketer works with, makes the job of consistent treatment of the brand, that much easier.

And the third reason is integration. It's harder for marketers to put together a well-integrated marketing plan when activities are splintered across multiple agencies. Having a single firm – or possibly a lead agency and a specialty firm – makes the job of creating and managing a program across multiple, well-oiled and well-integrated platforms, that much easier.

We've experienced both of these situations when helping marketers find new agencies to replace a larger, more fragmented roster of firms. In our last two searches, the marketers had rosters of 5+ firms, many small specialty shops, and they felt like few of them had the talents necessary to carry their business forward.

They also felt like they needed a firm that could coordinate within their four walls, a plan to move the client's business forward. In each of those cases, we were able to help the marketer find the agency to accomplish those ends.



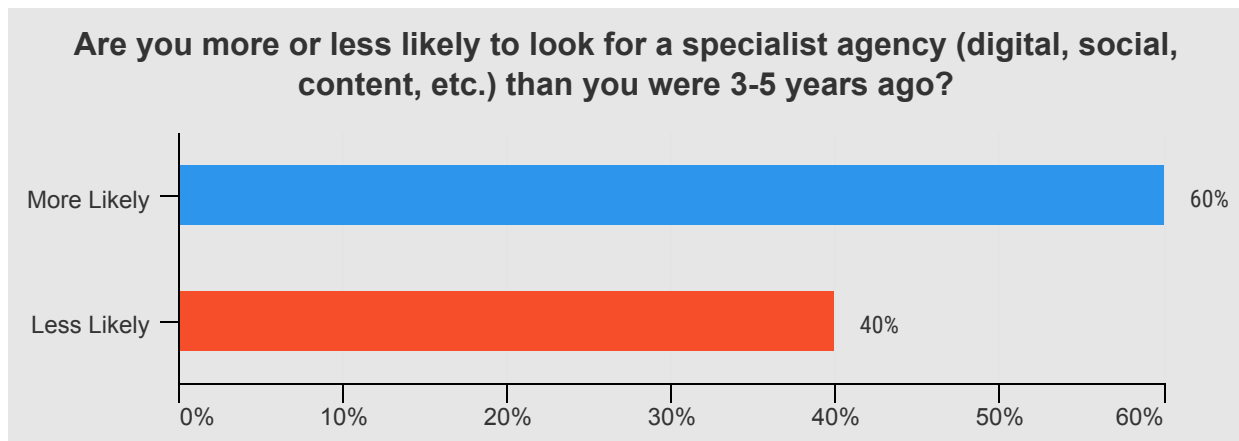
## IMPLICATIONS

Fewer agencies in the stable means fewer opportunities for agencies to win a client's business, although presents more opportunity if you're one of those two agencies. The best way to find your way into a client's world is by narrowing the focus of what you're offering the client and assuming part of their business (now) in the hope of winning more of it later on.

After three years of a decline in the percentage of marketers more likely to look for a specialty agency, 2020 saw a slight bump back up (from 52% in last year's report). 60% of marketers stated they were more likely to look for a specialty agency (e.g. digital, social) than they were 3-5 years ago.

**+8 points**

**YoY Rise In Marketers Looking For Specialty Firms**



So while you don't have to dedicate your firm to one area of expertise to be considered a "specialist," building up solid practice areas within digital and social media (as examples) can provide you with nice entry points if the lead agency either can't or won't do the kind of work the marketer is looking for them to do.

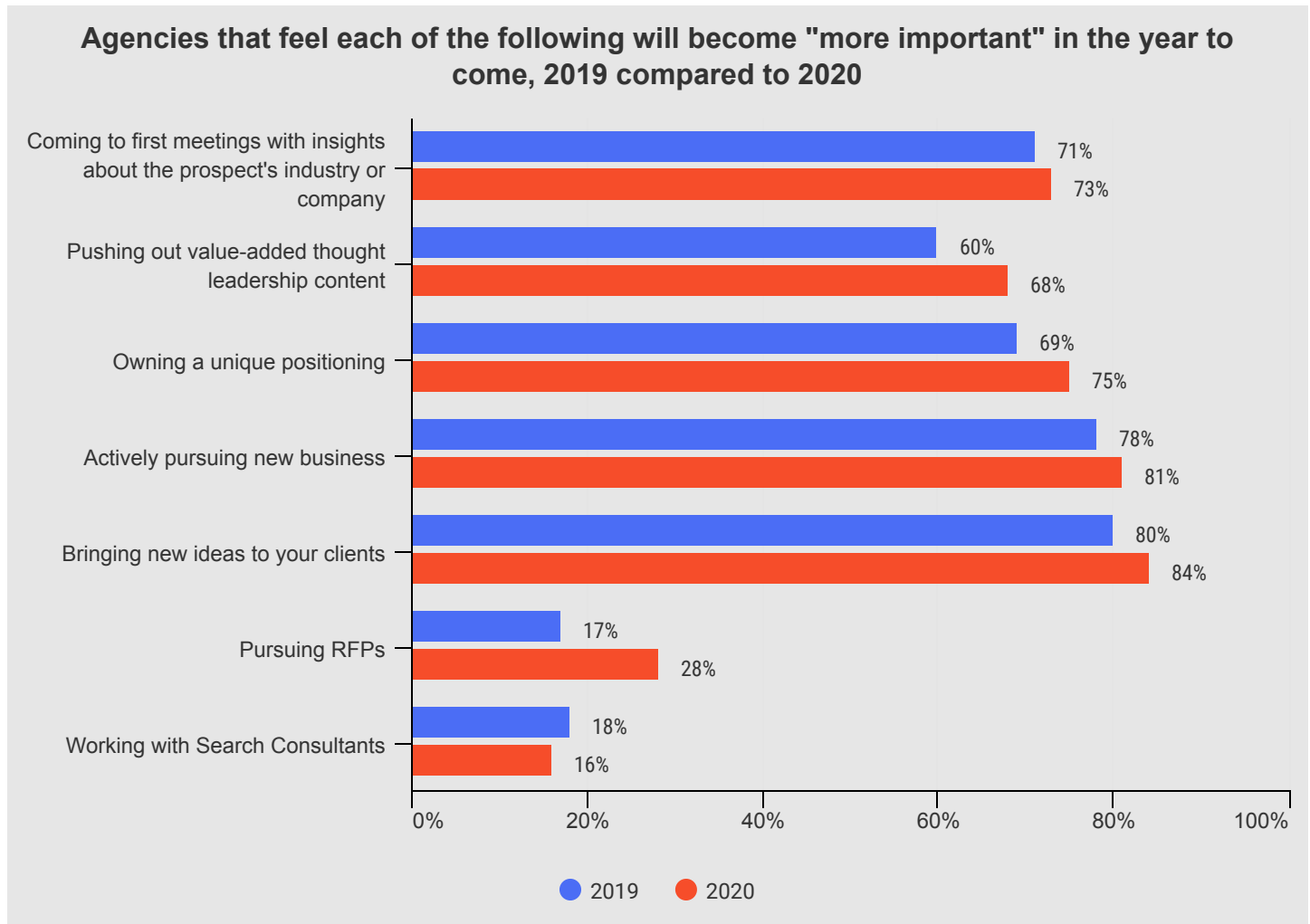


## VIII. How To Win One Of Those Two Agency Assignments

If most marketers today are only carrying a couple of agencies on their roster or carrying them as part of an on-going project-based stable of firms, the million-dollar question is, “how do I win one of those two spots?”

Winning new client business is no easy task. It takes persistence, focus, and a meaningful, value-added approach.

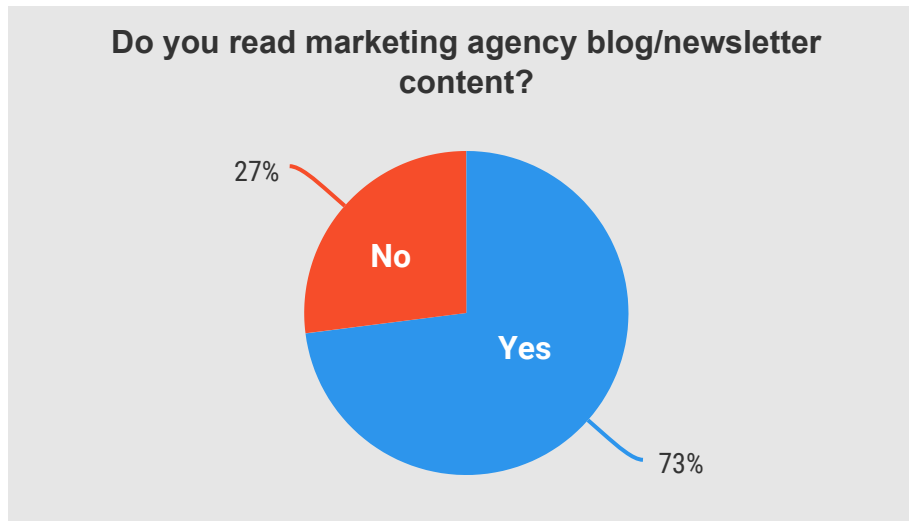
We asked agencies to tell us (this year and last year) how important they felt different parts of the new business process (both organic and new, new business) were important to their overall success.



Not unlike last year, “bringing new ideas to existing clients” and “actively pursuing new business for your agency” ranked on top of the things agencies felt were most important to their success. Also ranking high were “owning a unique positioning,” “pushing out value-added content,” and “coming to first meetings with insights.” “Pursuing RFPs” and “working with search consultants” ranked lowest, both this year and last.

## IMPLICATIONS

With 73% of marketers stating they read agency blogs, keeping good thought leadership content in front of your prospects is important if you want to set your firm apart from other agencies just trying to knock down a prospect's door.



Turning the entire exercise of agency new business into one that is all value-added and relevancy driven will help best position your firm in a more favorable light. It's how we manage our outsourced agency new business programs for our clients. It's how we manage our own business development here at RSW/US.

Rather than just opening up the PowerPoint presentation and sharing your capabilities, look up some news about the prospect or the industry, and let them know you're thinking about them in that first meeting you have with them. And rather than just being another agency that can do pretty much anything, own something unique to help your firm stand for something greater than just great work.

# IX. Biggest Challenges Facing Marketing Agencies in 2021

In your opinion, what is the single biggest challenge facing AGENCIES in 2021?

According To Agencies



According To Marketers



Unlike last year, when marketers felt like one of the biggest challenges facing agencies was proving their value, this year they feel like the biggest challenges revolve around the limited budgets they will have to support their business and the challenges associated with breaking through to an information overloaded digital consumer. Agencies also recognize the challenges ahead in working with smaller budgets, but they are also concerned about their need to find and retain clients.

## IMPLICATIONS FOR AGENCIES

There are two primary things an agency needs to do today to help them work their way through what will likely be an equally as challenging 2021.

One, agencies need to find creative and cost-efficient ways to help their clients build their businesses. Agencies need to set the traditional, expected ways aside and build programs that challenge the norms and capitalize on consumers' new ways of consuming goods and services.

The second is to put some kind of new business plan in place. Even if it's just an occasional email outreach to companies/people your agency wants to work with.

Do something, because doing nothing isn't a great way to offset slower existing client activity and a more competitive landscape of agencies.

## X. Biggest Challenges Facing Marketers in 2021

In your opinion, what is the single biggest challenge facing **MARKETERS** in 2021?

According To Agencies



According To Marketers



And unlike last year, when marketers felt like their biggest challenges centered around issues related to having the right resources, ROI, data, and budgets, this year the focus is entirely different.

Marketers today are concerned with the “how to.” How to reach their consumer given changing consumer habits and a changing media landscape. How to find new, creative ways to engage with consumers who are worn out with the virtual world. How to do more with less.

Agencies on the other hand see the issues most facing marketers as issues related to “uncertainty,” “complacency,” and “lost revenue.” Convincing clients to spend when they want to pull back, helping clients better understand how digital can help their business, and dealing with budget cutbacks while trying to find new ways to engage with their consumers in meaningful ways.

### IMPLICATIONS FOR MARKETERS

Marketers need their agency partners to help them sort all of this out. Relying on in-house agencies or their own wherewithal will be challenging in 2021.

Agencies need to capitalize on this opportunity and proactively keep new ideas, new approaches, and new thinking in front of their agency clients and potential prospects, keeping a keen eye on the back half of 2021, when consumers will (ideally) be able to travel and experience life again in a more normal way

While many marketers have come out of the “stick your head in the sand” reaction to COVID, there is still a long way to go. With the end of COVID faintly in sight, agencies need to convince their agency clients and their prospects that now is the time to re-connect (or increase the connection) with consumers and potential consumers. Left alone, competitors will certainly swoop in and do the job for them.

# CONCLUSION

## *So, What's Next?*

I introduced 2020 to our company during the 2020 kick-off meeting saying “Looking forward to this year!”.

Oh, what a year it was.

I introduced 2021 to our company this year telling them that 2021 isn't going to be any easier than 2020.

The challenges will remain the same, but there will be more of them and different ones we'll all (as a marketing and agency community) have to deal with.

The agency model was already in flux pre-COVID. The need for change has simply been accelerated and it's those agencies that are nimble and agile and open to exploring new ways of doing the same job – it's those agencies that will succeed.

What hasn't changed is the need for new business – both organic from existing clients and brand new, new business. And what hasn't changed is how that business is best won. There once was a day when over the top presentations and glad-handing made for a good new business plan.

Those days are long gone.

New business needs to be managed more strategically, more intelligently, more thoughtfully.

Marketers don't have time for fluff. They need to know why you're there. What makes you different. How you can help them get to a better place. They want to know you're thinking about them and not just about yourself.

As Leo Burnett told his people as he was walking out the door, if you can't bring value and you forget about what made this agency great, “take my name off the door”.

Think about how you're running your business and your clients business and your efforts to win new business. If it's all about bringing value – or at the very least that's the centerpiece of your efforts, you're on the right path forward.



# VIRTUAL CONFERENCE HIGHLIGHTS

Full listing can be found on our [agenda page](#).

## TRENDS & PREDICTIONS

MONDAY, 2/8

### Boots On The Ground Panel: Market & Agency New Business Trends & Advice, from 2020 Into 2021

Live panel led by Lee McKnight Jr. with agency principals and growth drivers at their respective firms:

- **Paul Pomeroy**, President of Aloysius Butler & Clark
- **Lissa Blackaby Forsterer**, VP of Agency Growth at Owen Jones and Partners
- **Jason Parks**, Chief Growth Officer at BARKLEY

who will give feedback on key takeaways from the RSW 2021 New Year Outlook Survey, as well as their own perspectives for agencies moving forward this year.

### Major Market Trends & Predictions from CMOs and VPs of Marketing

Mark Sneider leads a live panel of senior level marketers:

- **Ken Rhoman**, CMO of Wind Creek Hospitality
- **Alyssa Lahham**, Global Marketing Director of Cloud Blue (an Ingram Micro Company)
- **Saverio Spontella**, Senior Vice President of Sales of Mizkan Foods

These experts will share their perspectives in what is sure to be a lively discussion!



## OPTIMIZE YOUR AGENCY

TUESDAY, 2/9

### Defining Your Agency's Positioning, And Using It To Close Business

RSW New Business Director Beth Finn and RSW Digital Marketing Manager Steve Taggart offer two perspectives on the questions and challenges surrounding the definition of your agency's unique sales proposition. The session will cover defining and refining your agency's positioning, leveraging your agency's differentiation to guide content generation, and honing your message to drive relevant prospecting touchpoints.

### A Look Under The Hood Panel With Leading Agency & PR Thought Leaders

Lee McKnight Jr. leads a live panel of prominent agency and PR thought leaders as a companion to the day 1 "Boots On The Ground" panel, with **Gini Dietrich**, founder and CEO of Spin Sucks, **Drew McLellan**, an advertising veteran of 30+ years at Y&R, and currently McLellan Marketing Group, and CEO of the Agency Management Institute (AMI), and **Chip Griffin**, a serial entrepreneur in the PR and marketing community and creator of Agency Leadership Advisors.

### A View From The Eye of the Marketer – What They See And Do Everyday

Mark Sneider leads a live panel of senior level marketers: **Jen Brady**, Director of Brand Strategy and Corporate Communications of Consumers Energy, **Michael Dorington**, Vice President of Sales & Marketing of AMAROK, and **Jon Romanow**, Director of Marketing of Quest Consumer Products, as these thought leaders share their perspectives and experiences that come from working with agencies every day.

# VIRTUAL CONFERENCE HIGHLIGHTS

Full listing can be found on our [agenda page](#).

## TACTICAL TRAINING

WEDNESDAY, 2/10

### Converting Prospects To Clients - How To Create A Winning Program For Your Agency

New Business Directors Brandon Buttrey and Liz Lindley will outline how to maximize your effectiveness by establishing a proven prospecting strategy. You will take away skills that can be implemented today, along with a better understanding of pre-call preparation to improve each sales interaction and give you confidence to lock in new business! We will discuss specific elements including, creating an ideal client profile, crafting emails, phone outreach, increasing deliverability, pre-meeting planning, and navigating the first prospect interaction.

### Real Life Lessons From RSW New Business Directors You Can Apply to Your Own New Business Programs

- Using Multiple Channels In Concert With Each Other To Land Chipotle: Carrie Shoemaker (New Business Director, RSW/US)
- Key Takeaways To Winning Tourism Business Via Conferences: Kerry Moss (New Business Director, RSW/US)
- Winning Organic Wine Business With A Longer Sales Cycle And Successful Horizontal Agency Positioning: Pauline Echols (New Business Director, RSW/US)
- How Respectful Persistence Won the DuraFlame & Cowboy Charcoal Business: Brandon Buttrey (New Business Director, RSW/US)



## CLOSING NEW BUSINESS

THURSDAY, 2/11

### Where Others Fail: What To Do After The First Meeting

RSW New Business Director Rhonda Ford and RSW Director of Marketing Communications Miguel Trejo offer perspective on the importance of post-meeting follow-up in new business and provide actionable recommendations to improve long-term prospect nurturing. The session will include tactics and strategies to employ in follow-up communications immediately after a first meeting, the type and tempo of content to share with prospects to continue engaging with relevance, and the considerations to make when building long-term agency-prospect relationships.

### What Marketers Want And What They Get

Mark Sneider leads a live panel of senior level marketers who talk about some of the hard-to-believe experiences they have had in dealing with marketing agencies trying to win their business. **Jason Klinghoffer**, Senior Vice President of Direct to Consumer at Cinch Home Services, **Jolisa Johnson**, VP Marketing and Communications for Black Bear Diners, and **Joe Wood**, CMO at Sendik's Food Markets, join the conversation. Mark will help agencies identify what marketers really want from agencies during first calls and meetings to help them better their chances of winning new business.

# VIRTUAL CONFERENCE HIGHLIGHTS

Full listing can be found on our [agenda page](#).



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