

PRCA **Communications Management Standard (CMS)** for Agencies

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Introduction

Communications Management Standard (CMS) is the mark of communications professionalism worldwide. Created by the PRCA in 1997, it is based on ISO 9001 and Investors In People, with criteria specifically tailored to the needs of public relations consultancies.

Independently audited on a regular basis by Redfin Management LLP (Redfin), CMS is the accepted kitemark of PR excellence and professionalism. It helps to enhance the efficiency and profitability of PR consultancies, while also assuring both clients and employees that audited firms are properly run, and are accountable.

Consultancies that wish to be part of The PRCA's 'Find A PR Agency' (FAPRA), or 'Find A PA Agency' (FAPAA) service need to have passed a CMS Audit within the last two years, in order to benefit from the wide range of new business opportunities managed by the PRCA. CMS has now been adopted by 15 international PR professional bodies.

CMS covers nine business areas:

Leadership & Communication

The auditors look for evidence that the consultancy is well-managed. Responsibilities of the senior team must be defined clearly, and communicated effectively to all employees. The competencies required within the senior team should have been identified and appraised formally. Effective leadership requires good communications inside and outside the consultancy. Evidence of a communication strategy will therefore be sought.

“CMS has now
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Business Planning

The consultancy must prove that its business plan is a realistic, long-term programme based on a clear view of its direction and potential. It must define business goals that are specific, measurable, achievable, realistic and time-framed. The plan must be used systematically by management to run the business.

Business Improvement

CMS demands a programme of continuous business improvement, with evidence of long-term goals and the steps the consultancy is taking to achieve them. The standard's key values are trust, excellence, professionalism, growth, development, enthusiasm, commitment and ownership. All of these affect the quality of the consultancy's service to clients and must measurably be enhanced over a three-to-five year timescale.

Financial Systems

The consultancy's systems are evaluated on financial forecasting and management of financial fundamentals. Checks and balances must be in place, enabling the consultancy to withstand periods of low or negative economic growth. Key financial information is scrutinised by the senior team to ensure that the consultancy can and does invest in its future.

Campaign Management

The consultancy must demonstrate systems for planning and managing programmes against agreed targets as well as for measuring and evaluating results -where possible- in terms of ROI.

Client Satisfaction

Client Satisfaction must be tracked on a consistent and continuous basis to ensure that consultancies continue to exceed client expectations.

“Ensure that consultancies continue to exceed client expectations....”

New Business

There must be proof that the consultancy conducts negotiations with new clients and offers service agreements which reflect the high standards expected by the professional Codes of the PRCA, and complies with current best practise in the public relations profession.

People Management

The consultancy must have a clearly defined and universally understood system of appraisal, training and career development for all employees. Evidence must be given that high standards and an appropriate level of investment are in place at every stage from recruitment onwards.

Diversity

There must be fair and transparent recruitment processes and workplace practices in regard to diversity and equality.

Scoring

To attain the standard, consultancies must score at least 75% overall. A detailed breakdown of the scoring under each section will be provided with this briefing document, which will assist in the preparation for the audit. The first time consultancies take the Diversity module, the score will not contribute towards their overall CMS score, but they will receive a Diversity kite-mark if they get 75% in that module. However, the Diversity module will contribute to the overall score in subsequent audits. Following the audit, Redfin will submit a detailed report to the consultancy, including a full breakdown of their performance in each of the nine areas against the detailed breakdown of the scoring. The re-assessment period for CMS is every two years.

1 Leadership and Communication

1

1.1

Have the management structure and responsibilities been defined and communicated in a way that the wider team will understand. (up to 10 points)

All management responsibilities should be defined and communicated throughout the consultancy so that the whole team understands them.

Communication can be achieved through the use of organograms, management structure diagrams, job and role descriptions etc., and should demonstrate the appropriate division of responsibility between individual members of the management team.

The consultancy should be able to demonstrate that this has been communicated and understood by the whole team. This could be achieved by carrying out an employee survey.

1.2

What leadership skills do you look for within your Senior Team. (up to 10 points)

The consultancy should be able to list the key behavioural competencies/skills required for each of the senior team roles, and show where they are included within the job description. They should also be able to demonstrate the senior team's use of the competencies/skills via the individual's annual appraisal and personal development plan.

1.3

Is there a system to ensure effective communication to internal and external parties? (up to 10 points)

The consultancy should have defined and implemented a strategy to cover its communication to internal and external stakeholders.

A communication strategy is defined in Wikipedia as follows: “a communication strategy is a plan that details how information and issues are presented in order for people to understand and respond to them. It is a selection of appropriate communication objectives by which information relating to an organisation is communicated both externally and internally.”

The strategy should include the types of issues and news information that

should be communicated, as well as timescales for its communication. External stakeholders will typically include: shareholders, the media, the local community, clients, new business agencies, government agencies, non-government agencies, trade associations, professional bodies and educational establishments. Internal stakeholders will be all staff employed within the consultancy.

The communication strategy should document the above along with the appropriate authorisation levels for different levels of communication.

The consultancy will need to demonstrate that the communication strategy is understood and is being followed by the consultancy.

“All management responsibilities should be defined...”

2 Business Planning

2

2.1

Does the consultancy have a business plan? (up to 10 points)

The consultancy must demonstrate a business plan that sets out the short-term and long-term goals and objectives for the consultancy. This plan must be the engine that drives the search for continual improvement. The business plan is normally produced annually and is developed alongside and reviewed against the consultancy's statement of visions, values and long term improvement activities. See *section 3.1*.

The business plan will typically include the following:

- New and existing market opportunities
 - Financial goals and objectives (e.g. target fee income, profitability etc.)
 - Business goals and objectives (e.g. ranking in the marketplace, sector and specialist offerings etc.)
 - Any major improvement projects
 - Identification of future resource requirements as well as associated training, recruitment, IT etc.
- Summary of market trends
 - Financial status of the consultancy
 - An analysis of strengths, weaknesses, threats and opportunities

2.2

Does the business plan define clear goals and objectives? *(up to 10 points)*

The plan should define business goals and objectives that are SMART:

- Specific
- Measurable
- Achievable
- Realistic
- Time-framed

2.3

To what extent is the business plan communicated to all levels of the consultancy? *(up to 10 points)*

It may not be appropriate to communicate the entire business plan to all employees, but at the very least, the consultancy must be able to demonstrate that the key goals and objectives have been communicated throughout the consultancy.

2.4

Is the consultancy's performance compared to the business plan's goals and objectives? *(up to 10 points)*

It is important that the consultancy's performance is monitored and compared against the goals and objectives established in the business plan. Depending on the specific goals and objectives, this comparison can be carried out monthly, quarterly or annually.

To help achieve the plan, any deviations in goals and objectives between current performance and desired performance should be reviewed, and corrective action should be taken where possible. Minutes should be prepared recording deviations from the plan, the reasons for the deviations, and any action taken.

2.5

Is the business plan reviewed regularly for adequacy? *(up to 10 points)*

It is up to the consultancy to determine the frequency of the business plan reviews, but they should be sufficient to cover the period of the business plan, i.e. an annual plan should be reviewed quarterly or at least six monthly, and long-term goals (three to five years) should be reviewed annually.

At review, it may be necessary to change the business plan due to external influences (e.g. changing market circumstances) or internal influences (e.g. change in business direction, loss of key personnel or loss or gain of clients). The consultancy should produce evidence of such review processes in the minutes of the review meetings.

3 Business Improvement

3

3.1

Does the consultancy have a clear vision and set of values shaping its purpose and long-term goals? *(up to 10 points)*

The vision and key values for the consultancy will typically be expressed as a simple statement of the overall aims and objectives of the consultancy. They should directly link with the long-term goals of the consultancy.

The consultancy's vision statement is an important component of its brand definition and may refer to the following elements: client satisfaction, people management, performance, key values, and quality of service.

Key values may be expressed as trust, excellence, professionalism, growth, development, enthusiasm, commitment and ownership.

This statement should ideally be developed with employee involvement and signed by senior management. It needs to be underpinned by strategies and policies that address proactive, long-term improvement consistent with the consultancy's business plan.

3.2

To what extent does the consultancy involve staff at all levels in business improvement activities? *(up to 10 points)*

The consultancy should involve staff in improvement initiatives, in order to foster their ownership and commitment.

Examples of business improvement activities are:

- Suggestion schemes
- Away days
- Competitions
- Recognition schemes

- Presentation of improvement ideas at team meetings/team development workshops
- Best practice workshops
- Continuous improvement groups

3.3

Does the consultancy carry out benchmarking as a means to business improvement?
(up to 10 points)

Benchmarking is defined in Wikipedia as:

“the process of comparing something or someone with best practice.”

The consultancy should define clearly what it will compare, and whom to compare against.

On “What to Compare” there are three types of benchmarking:

- **Performance** – comparing performance levels against

other consultancies, in order to position the consultancy against the rest of the industry e.g. the PRCA Benchmarking Survey.

- **Process** – identifying best practice processes, and comparing the consultancy’s processes against them, e.g. PRCA Best Practice Papers, or the latest HR industry data on graduate recruitment.
- **Strategic** – identifying the strategic policies of competitors, and comparing the consultancy’s strategies against them, i.e. benchmarking your acquisition or growth strategy against key competitors.

With regard to “Whom to compare against”, there are the following types of benchmarking:

- **Internal** – against different teams and division within a

consultancy or within a group company of consultancies.

- **Competitive** – against competitors, e.g. other consultancies or sector specialists.
- **Generic** – against companies in other industries, e.g. management consultants, brand or change consultancies.

3.4

Is there a system to manage improvement projects?
(up to 10 points)

Examples of improvement projects would include: IT or capital investment, developing new markets, and the launch of a new service.

The project’s system should include:

- Sign off for the preparation of a project plan

- A project plan to include:
- Defined responsibilities
- Establishment of procedures to fulfil plans
- Defined approval stages throughout the project
- Milestones and deliverables
- Final review and sign off of the plan
- Implementation plan

Projects implemented must be consistent with those included within the business plan.

3.5

Is there a system for collecting, reviewing and utilising key information to increase management control and maximise business efficiency?
(up to 10 points)

Management should identify and manage all key business information, and define the system to ensure that necessary

information is communicated up and down the consultancy’s structure. Key business information includes:

- Business improvement activities
- Review of business plans
- Management accounts
- Review of campaign management activities
- Review of client satisfaction performance
- Service delivery performance
- Recruitment, development and retention of personnel

The system should identify clearly what meetings are held, and detail their scope, frequency, agenda and attendance. It should ensure that the information is of appropriate quality, on time and communicated to the necessary personnel.

“Trust, excellence, professionalism, growth, development, enthusiasm, commitment and ownership...”

4 Financial Management and Systems

4

4.1

Does the consultancy prepare adequate monthly management accounts? *(up to 10 points)*

The consultancy should produce regular relevant financial management information, for example: profit and loss accounts, balance sheets, debtors, key ratios/indicators and benchmarking. This information should compare the actual results with the business plan, to track performance against the business goals (as included in 2.4 above), as well as including monthly forecasts of fees by client and profitability for the following 3-6 months.

4.2

Does the consultancy have a consistent and effective process for calculating fees for client work? *(up to 10 points)*

The consultancy should demonstrate that there is a standard process for preparing client fee proposals. This should include details of how estimates are made of expected time on client work, which may include for example discussing the work involved in advance with the proposed team or reviewing past time records on similar work. Proposals should either be prepared by the senior team, or signed off by them prior to them being sent to the client.

4.3

Does the consultancy have effective client billing and credit controls systems? *(up to 10 points)*

The consultancy should demonstrate that it has effective systems to ensure accurate and regular client invoicing takes place, and that there is a process to chase client payment within the consultancy. The consultancy should make available relevant information, for example: billing and credit control procedures, examples of notes on outstanding debts, client credit evaluations, aged debtor lists and, if applicable, evidence of provision for bad debts.

4.4

Does the consultancy have effective systems and processes to manage staff time and to report on utilisation and over/under client servicing? *(up to 10 points)*

The consultancy should demonstrate systems and processes that provide appropriate control over the management of staff resources on client and non-client work. Plus, that there is a process for regular review and sharing over/under-servicing information within the consultancy so that action can be taken where appropriate.

4.5

Does the consultancy have an effective system for control of capital? *(up to 10 points)*

It is recommended that every consultancy maintains a cash balance equal to at least 3 months of the monthly overhead cost. Although this is not a requirement of CMS, the consultancy should be able demonstrate systems for control of capital such as: cash flow controls, investment decisions, equity management, and currency controls.

5 Campaign Management

5

5.1

Does the consultancy have an effective system for capturing client requirements? *(up to 10 points)*

From receipt of the client's brief (whether an existing client or a new business enquiry), the consultancy should have systems in place to capture client requirements covering:

- Reasons for the client changing consultancy
- Client's objectives
- Critical success factors – the key activities necessary to ensure a successful campaign
- Key performance indicators
- Milestones and deliverables
- Client approval processes

5.2

Does the consultancy have an effective planning system to ensure delivery to client expectation? *(up to 10 points)*

The consultancy must demonstrate use of planning activities such as:

- Pre-campaign research
- Campaign planning
- Allocation and availability of appropriate resources: time, competent personnel, and budget
- Development of strategy
- Communications processes: points of contact, feedback on progress and meetings

5.3

Does the consultancy have effective information control? *(up to 10 points)*

The consultancy should have effective systems for the identification of critical information, for example: electronic and manual filing, handling, back-up, retrieval, disposal and security. Critical information will include: email/ paper correspondence, approvals, photography, logos, proposals, plans, complaints, reports and invoices.

5.4

Does the consultancy ensure the consistent delivery of services by suppliers? *(up to 10 points)*

The consultancy must demonstrate that its suppliers go through a process of

selection, approval and monitoring to ensure adequate and consistent of service. An effective system may include the following:

- Processes for evaluation, approval and review (to include credit checking, professional indemnity insurance etc.)
- Approved lists of suppliers
- Performance monitoring
- Evidence of partnering and building relationships with preferred suppliers

5.5

Does the consultancy monitor campaign performance and take appropriate actions? *(up to 10 points)*

The consultancy should demonstrate regular campaign performance measurement to ensure effective implementation

of the campaign plan, so that clients' requirements are met, and that the consultancy's reputation is maintained or enhanced. The consultancy should identify and agree with the client the most appropriate forms of performance evaluation such as setting the key performance indicators, critical success factors, milestones and deliverables. (See 5.1)

Where performance falls short of expectations, appropriate corrective action should be identified and taken. Significant failures should be investigated fully to identify the root cause, and system improvement activities initiated to prevent re-occurrence. Evidence of campaign performance monitoring will include: status reports, minutes of internal meetings, and minutes of client meetings.

6 Client Satisfaction

6

6.1 Does the consultancy have a system to measure client satisfaction? (up to 10 points)

The consultancy should have a system for measuring client satisfaction, which encompasses all clients. This system should be appropriate to the size of consultancy and the complexities of the client relationships.

The system will typically include some of the following activities:

- Regular review meetings
- Regular informal meeting or lunches
- Formal annual or six monthly reviews
- Perception surveys/questionnaires
- Complaints systems
- Reviews from other account directors within the consultancy

The system should indicate the frequency of the review activities, the forms of measurement being used and it should set key performance indicators for client satisfaction.

The consultancy must document the outputs from its client review system.

6.2 Does the client satisfaction measurement address all elements of the service? (up to 10 points)

In order to ensure that the client's perception of the consultancy's service matches their expectation, it is important for the consultancy to understand all aspects that will impact on client satisfaction. The client review system should measure the consultancy's performance service levels on the following:

- Understanding the client's expectation
- Meeting the client's expectation
- Communication with the client
- Market knowledge
- Creativity
- Strategic thinking
- Team work
- Timeliness of delivery
- Quality of service delivery
- Client's overall perception of the service provided

6.3 Is the client satisfaction measurement implemented effectively? (up to 10 points)

The consultancy must demonstrate that client satisfaction is measured against the performance targets set in 6.1 above, and that actions are taken as a result. Results must be communicated throughout the

consultancy, and action points agreed with staff as appropriate. It is important that results of the surveys are communicated back to clients, and individual feedback may be appropriate with particular clients.

6.4 Does the consultancy periodically compare client satisfaction across accounts? (up to 10 points)

The consultancy should conduct regular management reviews of overall client satisfaction performance through the consultancy. This should be at least every six months and include trend analysis of satisfaction levels across accounts and account teams. It should also address how effective the system is in monitoring client satisfaction.

“Ensure that the client's perception of the consultancy's service matches their expectation...”

7 New Business

7

7.1

Does the consultancy have a strategy for business development, to achieve its goals and objectives? (up to 10 points)

The business development strategy must be derived from the goals and objectives outlined in the consultancy's business plan. The strategy will include the following:

- Marketing plans (to include how leads will be generated as well as how additional work could be obtained from existing clients)
- Defined responsibilities with targets
- Business cases, i.e. analysis of the market or sector opportunities
- Performance monitoring
- Communication of the strategy to the full team

The strategy may also include a plan for different sectors. This will be required when target market sectors requiring different development strategies have been identified, e.g. where a consultancy has identified that it would like to move into a new sector or specialist service offering.

7.2

Does the consultancy have an effective system for the management of its enquiries and sales? (up to 10 points)

The consultancy must be able to demonstrate an effective process for the handling and management of all enquiries, proposals, credentials meetings, pitches, contracts and sales. An effective system will include:

- Logging, handling, follow-up and closing of all enquiries and proposals
- Issue and signing of the PRCA standard consultancy contract to all new clients
- Analysis of successful and lost credential meetings and pitches
- Briefings to new business agencies and intermediaries
- Management of prospect relationships including database maintenance and periodic review of lost pitches and accounts

“The consultancy must be able to demonstrate an effective process for the handling and management of all enquiries, proposals, credentials meetings, pitches, contracts and sales....”

8 People Management

8

8.1

Are the processes for selection of prospective employees determined according to the needs of the position? *(up to 10 points)*

The consultancy should demonstrate that its recruitment is determined on the needs of the position. This can be shown through the use of: job descriptions, role profiles, competence analysis, capability analysis, consultancy values and training and development plans.

The employee selection methods used by the consultancy may include:

- Review of qualifications
- Relevant experience
- Psychometric/personality profiling
- Testing of PR and other relevant skills
- Structured interviews

8.2

Is a general induction conducted for new employees in their first week of employment – if so, is it signed when completed by the employee, and are exit interviews conducted when staff leave. *(up to 10 points)*

The content of the induction will vary depending on the position of the new employee and may include introduction to the following:

- Consultancy background, values and credentials
- The make-up of the team, with individual line management and reporting structures
- Relevant clients
- Internal systems and processes
- Client handling system
- Criteria and methods for campaign planning, research and evaluation

- Human resources
- Health and safety
- Pension and finance issues
- PRCA Professional Charter and Codes of Conduct
- PRCA Communications Management Standard

Where exit interviews are carried out, they should be conducted by a person that is independent of their line manager.

“The consultancy should demonstrate that its recruitment is determined on the needs of the position....”

8.3

Does the consultancy have a formal appraisal system? *(up to 10 points)*

The consultancy should demonstrate that it has a formal appraisal system which is designed to review performance against the personal objectives and targets of each member of staff. These objectives and targets will include both business and personal development.

The consultancy will determine the frequency of formal appraisals, but must demonstrate the occurrence of appraisals, review of follow-up action and that it feeds into the consultancy's recognition and reward systems for retention of key staff.

8.4

Does the consultancy conduct training needs' analysis, and are personal development plans prepared based on the training needs? *(up to 10 points)*

The consultancy should demonstrate that it conducts a needs analysis to identify the training necessary for specific roles within the consultancy. The training needs' analysis should be sufficient to implement the business plan at company, team and individual levels. It will focus on what training is required to meet business needs, rather than what individuals would like to be trained in.

A training needs analysis will include a review of tasks and job descriptions and a review of existing competencies to assess what technical and behavioural training is required.

The consultancy should demonstrate that personal development plans for individual staff match the consultancy's training needs analysis. Effective personal development plans will contain SMART objectives and targets for employee training and development.

The consultancy should give evidence through records of training delivery for both internal and external training activities.

8.5
Is training performed in accordance with personal development plans and are the training courses consistent across the consultancy?
(up to 10 points)

The consultancy should demonstrate through its training records that there is evidence of the training provided, and that it is in line with personal development plans. The auditor will ask for verification of training activities through written proof of attendance, provided by training providers.

The consultancy should demonstrate that there is consistency of training across the business, especially in client-facing and people-management areas.

“The consultancy should demonstrate that there is consistency of training across the business....”

9 Diversity

9

9.1
Is there a diversity and equality policy that demonstrates best practice? *(up to 7 points)*

The organisation should be able to demonstrate that best practice is being followed by ensuring there is a diversity and equality policy in place, in order that staff members are clear about the requirements.

The policy can be a stand alone document or part of the employee handbook and should include the following elements:

- Fair treatment in terms of recruitment and employment
- A process to pro-actively seek a wide demographic pool of candidates
- The organisation is free from harassment and bullying or any unwanted behaviour
- Equal right to contribute by all – therefore no workplace discrimination

9.2
How has the organisation supported managers and employees with diversity and equality practices? *(up to 3 points)*

The organisation should be able to demonstrate that diversity and equality practices are included as part of manager training, that it runs dedicated training sessions, and it has developed specific guidelines for managers in order that they are clear about their responsibilities.

The organisation can also demonstrate they carry out other activities for staff to ensure their understanding and buy-in to diversity and equality:

- Internal and external recognition schemes
- Internal events
- Internal communication
- Training and reporting

9.3

Does the organisation ensure diversity and equality practices are followed when recruiting? (up to 7 points)

The organisation should be able to provide evidence the policy is being followed in terms of recruitment, in particular:

- When preparing recruitment agency briefs or internal adverts they should ensure the terminology used does not discriminate against individuals and is specific to the role being advertised
- Copies of recruitment agency briefs should be kept, showing they have specifically asked for a wide pool of diverse candidates
- Proving that the selection process is fair and consistent by demonstrating that a documented process for each

role is in place, based on a set of generic questions or scenarios

- Relevant measures/scoring system used to select the right candidate with the skills required for the role. The scoring system forms part of the documented process and all recruiting managers will have been trained in the process
- All results of the process are fed back to successful/unsuccessful candidates in order that they are clear how they have performed during the process
- They actively recruit from areas that contain a wide pool of demographic groups e.g. certain education institutions or specific parts of the country

9.4

Does the organisation ensure diversity and equality practices are followed throughout the new starter process? (up to 3 points)

The organisation can demonstrate that the new starter form allows for relevant diversity and equality information.

Once completed, it should be documented within individual personnel files and other employee data.

There is also evidence that the organisation collates, summarises and reviews this information on a regular basis.

9.5

Does the organisation measure diversity and equality among its current employees? (up to 6 points)

The organisation can demonstrate various measures of diversity and equality, in particular:

- Regular salary surveys are carried out
- KPIs are in place to measure diversity as a whole such as demographic data, employee surveys, recruitment and promotion, maternity leave returner rates and cultural measures
- Their diversity figures show that they are performing better than the most recent PRCA's Census results

9.6

What adaptations does the organisation make in terms of diversity and equality? (up to 4 points)

The organisation must demonstrate that modifications have been made for those who are disabled, whether staff or visitors, in line with company policy and also the Disability Discrimination Act.

They can also show evidence that they accommodate different religions and beliefs by ensuring flexibility in the working day, prayer arrangements etc.

They review all maternity/paternity returner requests e.g. flexible working – part-time, job share, home working etc.

9.7

How does the organisation recruit interns in terms of diversity and equality? (up to 8 points)

For interns, the organisation will be required to demonstrate that there is full line management for the individual, a structured training plan, as well as exit interviews on leaving. The organisation's website should include all internship and graduate recruitment policies.

Interns (as defined in the PRCA Internship Guidelines) should also be paid at least the National Minimum Wage or London Living Wage, in accordance with the PRCA guidelines.

For the purposes of the PRCA Diversity CMS module please consider the following classifications:

Ethnicity

- White British
- White non-British
- Mixed / multiple ethnic groups
- Asian / Asian British
- African / Caribbean / Black British
- Other

Disability

- Physical impairment (such as difficulty using your arms or mobility issues which mean using a wheelchair or crutches)
- Sensory impairment (such as being blind/ deaf or having a serious visual/hearing impairment)
- Mental health conditions (such as depression or schizophrenia)

- Learning disability (such as Down's syndrome or dyslexia)
- Cognitive impairment (such as autism or head injury)
- Long-standing illness or health condition (such as cancer, HIV, diabetes, or epilepsy)

Sexual orientation

- Heterosexual
- Lesbian
- Gay
- Bisexual
- Other

Gender

- Male
- Female
- Transgender

Nationality

- UK national
- EU national
- Non-EU national

Dependents

- Disabled dependents
- Elderly dependents
- Other

Age

- <18
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+

Religion

- Christian
- Muslim
- Hindu
- Sikh
- Jewish
- Buddhist
- Other
- No religion



Redfin Management

Redfin Management LLP (Redfin) is a business that specialises in advising PR agencies and a range of other marketing communications agencies in business management.

Redfin is proud to be involved with the PRCA, and to play an active role in both the auditing of PRCA members, and in the future development of the Communications Management Standard.

All Redfin's auditors have worked within PR agencies, so understand how they work and the issues they face. Their background covers a variety of disciplines including business management; account handling, finance and HR. Heather Scales is available to discuss any questions you may have regarding the Communications Management Standard, she can be contacted on the following:

Heather Scales
T 0207 060 0242
heather.scales@redfin.co.uk

A Guide To The Audit Process

We suggest that you first go through the CMS document and the detail scoring template associated with it.

This will allow you to rate your consultancy against the criteria. If you are satisfied that your company will meet the criteria, and the pass rate 75% overall, then please contact Heather Scales on either 0207 060 0242 or heather.scales@redfin.co.uk , who will provide you with a quotation and book a convenient date for the audit.

Preliminary Gap Analysis (optional)

You can if you wish, opt for a preliminary assessment/gap analysis. This can range from a few hours to a whole day visit by a Redfin auditor to discuss all the elements of the Standard, assess your state of readiness, discuss areas of interpretation, and generally answer any questions you may have about the process. This may assist you in your final preparations. It is an optional service at additional cost, and Redfin can provide a quotation on request.

Once you have agreed with the PRCA that you are ready for your first audit, or that a renewal audit is due, Redfin will contact your nominated representative and agree a mutually convenient date for the visit. Redfin will agree the date and time for the audit and all of the details will normally be confirmed in writing (including, when appropriate, details of any fees due). The number of audit days will depend on the size and turnover of the consultancy.

On the day/first day of the audit, the auditor will arrive at the agreed time and there will be an opening meeting of approximately 15 minutes duration.

“Rate your consultancy against the criteria...”

The purpose of the meeting is to explain how the audit will be carried out and reported, and to answer any questions there might be. You can invite as few or as many people as you want to this meeting.

It is useful to provide the auditor with a room or desk that they can return to during the audit, to write notes or plan the next interviews.

Typically, the day will start with the senior management looking at Business Planning, Financial Management & Systems, Leadership, Business, Improvement, People Management etc. The remainder of the time is spent sampling the accounts and clients selected, and sitting with the people and teams involved, usually at their desks as most of the information will be held on their computers.

It would be useful to have ready some of your standard documentation at the start of the audit, for example if applicable:

- The business plan
- Mission and values statement
- Business strategy documents not included within the business plan
- Management accounts and other regular management information including aged debtors and aged creditors
- Organogram or list of management, and staff structures and responsibilities
- Internal process or 'ways of working' documents
- Staff handbook
- New joiner induction pack
- Evidence of regular management and staff meetings, forum and communication
- List of current staff, with joining dates and leaving dates over the last 6 months
- Client list and associated account teams

Frequently Asked Questions



Q:

How can we best prepare for the Communications Management Standard audit?

A:

There is no “off the shelf” solution to this question. Consultancies adopt different approaches, though in our experience, it is more effective if someone owns the project to achieve the Standard and drive it through. Some consultancies appoint “section champions” to take specific sections and review the question template to look at how the consultancy meets the CMS criteria. Others have business improvement initiatives and teams looking at this, or organise an away day to brainstorm it. A lot of what is required will already be happening, but may not be as evident or formalised as it might be, so the task is often not as daunting as it first appears.

Q:

What help and advice can we get during the preparation phase?

A:

Redfin are more than happy to provide assistance and answer questions or queries during the preparation phase. You can contact Heather Scales on 0207 060 0242 or heather.scales@redfin.co.uk at any time and she will provide assistance. Alternatively, you can opt for a pre-assessment/ gap analysis.

Q:

How do we arrange an audit when we think we are ready?

A:

Contact Heather Scales at Redfin on 0207 060 0242 or heather.scales@redfin.co.uk and ask for a quotation. A quote will be provided based on the size of the consultancy (by turnover and number of office sites) and ask you for an indication of timescales. Please note that lead times can sometimes be between 4-6 weeks.

Q:

How much will it cost?

A:

Redfin and PRCA have agreed a scale of charges depending on the size of the consultancy. All quoted prices are subject to VAT at the prevailing rate, but

fully inclusive of all attributable expenses. Most audits last for half or one day’s duration, but larger or multi-site consultancies will require more time.

Q:

When will we know the outcome?

A:

The auditor will write up the report shortly after the audit, and advise the outcome of the audit within 5 days.

Q:

What is a typical audit programme for the day?

A:

You will be contacted prior to the audit and a schedule for the day and timescale for the visit agreed. Your Redfin auditor will agree detail of the audit programme in the opening meeting.

Q:

Do we need to prepare a folder/ portfolio of evidence?

A:

As mentioned above it would be useful if much of the standard list of information is available at the start of the audit. The auditor will also search and ask for the information during the audit however, bearing in mind the question template, it would be useful to have to hand information that you feel may be relevant to the audit. For clients/accounts, the auditor will sit with the account team and view documents/electronic information as necessary.

Q:

How detailed is the financial section of the audit?

A:

The Redfin auditor is both trained in the requirements of CMS and has good experience of working in PR Agencies. They are expected to ask questions and review the evidence presented with a degree of financial competency. However the auditor is not necessarily a fully trained accountant and is therefore expected to use their judgment to decide whether the evidence presented appears to meet the requirements. The finance section of the CMS should not be compared to the requirements of a statutory audit or due-diligence review.

Q:

Who needs to be involved?

A:

Senior management, people with specific responsibilities for certain sections (e.g. Financial, HR, New Business etc.) and those people involved in the management of the client accounts selected. Other people may well be interviewed during the audit but it is unlikely that all employees will be involved.

“It is more effective if someone owns the project to achieve the Standard and drive it through...”

Willow House
Willow Place
London SW1P 1JH

T 020 7233 6026
F 020 7828 4797
www.prca.org.uk

