CLIENT-CONSULTANCY PARTNERSHIP CHARTER AND GUIDELINES FOR CODE OF CONDUCT

GUIDELINE 2: BUILDING A COLLABORATIVE WORK ENVIRONMENT BETWEEN CONSULTANCY AND CLIENT FOR MUTUAL RESPECT

Preamble:

With the PR industry growing rapidly, a professional, ethical, and respectful client and consultancy relationship is the cornerstone for driving professional services in a collaborative environment. The nature and scope of services provided by PR firms to their clients is diverse, ranging from basic services to strategic consulting for brand and corporate reputation.

The objective of setting these guidelines and rules for engagement is to encourage a culture of mutual respect and ethical behaviour, creating a better professional environment for raising the bar and witnessing collaborative and compelling work from the industry.

Statement of Purpose & Framework:

As an industry representative, adhering to these guidelines to build collaborative work environment, both the PR consultancies and clients, affirms, their commitment to fostering enduring partnerships, transparent processes, and the highest ethical standards of professionalism, that will also lead to progressive benchmarks and mutual respect for everyone in the communications industry.

Recommendations For Clients and Consultancies:

1. **One Team Spirit**
   a. It is recommended that the client should:
      - Create an environment of inclusivity for consultancy partners and treat both in-house and consultancy teams with the spirit of 'One Team', demonstrating mutual respect, equal opportunities, and responsible participation.
      - Every quarter, healthy discussions should be conducted to review the successes and failures of the entire team and productive feedback should be appreciated. Opportunity to learn together can be identified to strive for excellence and knowledge gain.
      - Equal opportunities for training should be explored, especially for large project, through access of information, subject matter experts and leadership team for best outcomes.
      - Team gaps should be addressed through candid discussions within corporate communication leader and consultancy lead, fostering a solution-oriented

mindset for best interest of working teams within their respective organizations.

- Companies with large in-house teams should establish timely checkpoints to ensure that the 'One Team' philosophy is stemming from the top and reaching all levels of the organization.

b. It is recommended that the consulting firm should:

- Have members of the servicing team available and willing to learn and demonstrate the highest level of professional acumen.
- Review of performance should be considered to identify any gaps.
- Demonstrate passion and commitment to the client's brand and steps taken by servicing team to understand client's business.

2. **Onboarding Process**

a. Client and consulting firm will spend the first seven to 15 days in onboarding and assimilating information, meet relevant experts and stakeholders in order to create plans, and messaging for the client. This could be extended basis the readiness of the client and mutually agreed upon.

b. It is recommended that the client should:

- Share all documents pertaining to the company with the consultancy in a structured manner and take them through the materials to ensure they are well-versed in the corporate and brand guidelines.
- Set up briefing meetings with relevant stakeholders in order to get the firm's team up to speed on the client requirements. Provide hands-on experience of the products of clients, help gain knowledge about the product and exposure to working experts, through show and tell is advisable for knowledge transfer.
- Additionally, it is essential for clients to offer meetings with the CEO and other C-suite executives who will be critical stakeholders and having an increasingly important role in setting the expectation in reputation building efforts by the wholistic PR team.

c. It is recommended that the consulting firm should:

- Make all team members who pitched for the account and are part of the servicing team available for briefing meetings and information exchanges. Senior management/partners should participate in these meetings based on the requirement.
- Post the consultancy shortlist, transparent alignment between client and consultancy is strongly recommended about the actual service team on the account, with no room for surprises.
- Get the servicing team to spend time to understand the client's business and sector as far as it is available in the public domain.

3. **Regular servicing engagement**

a. **I**t is recommended that the client should:

- Provide regular briefings which could be monthly, quarterly or annual depending on priorities and developments which impact the PR and communication campaign.
- Set up insiders' meetings with important stakeholders on key campaigns or focus areas for an effective communication strategy development.
- Whenever possible, use written templates or presentations for briefs to minimize misunderstandings.
- Offering relevant research/company data may be useful for deeper business understanding.
- Define mutual goals and metrics to campaign and strategy so outcomes can be reviewed and measured scientifically. Media output should not be the only metric, especially with integrated programs. Shift in perception, impact on specific target groups, and actions can be well documented.

b. It is recommended that the consulting firm should:
- Share feedback and input on the campaign undertaken by them. This ideally should be done monthly for tactical-level initiatives, quarterly for key achievements and learnings, and annually for impact analysis. Make all servicing, and planning team members available for these meetings and engagement.
- Share a template for these reviews, plans and outcomes that have been mutually agreed upon with the client.

4. **Team resourcing and role definition**
   a. In the RFP, the client should define the team requirement in terms of:
   - Number of team members required (with locations if possible).
   - Years of experience of the team members required.
   - Special expertise if required.
   b. Capacity of the team required for the mandate. It is recommended that the consulting firm should:
   - Provide the names of the team members along with their respective experience levels, not necessarily described best by designations.
   - Address the discrepancy between promised dedicated resources and the reality of team members balancing responsibilities across multiple locations by implementing stricter resource allocation policies and regular workload assessments.
   - Implement a robust mechanism to track senior leadership involvement at the strategic level, beyond just crisis management and initial pitching stage. Additionally, establish performance metrics tied to strategic leadership engagement to ensure accountability and drive continuous improvement in this area.
   - Give adequate notice (at least 15 days) to the client in case of departure of a team member. Either provide a replacement resource with similar experience level within a mutually-agreed timeline with the client or ensure a bench strength of

people in sync with the size of business and attrition rates to meet client replacement requirements are within reasonable timeframe.

5. **Team Communication Within Client-Consultancy**
   a. It is recommended that the client should:
      - Ideally, aim to conduct all communications during mutually agreed-upon working hours with the consulting firm. However, given the nature of our profession, exceptions may arise in particular times of crisis.
      - Crisis Management: During crises, it's crucial to provide strong support, even if it means deviating from standard procedures. This entails offering quick access to consultations and rapid response times from the PR consultancy and firms. Additionally, it's important to recognize the challenges faced by Indian corporates and MNCs operating in various time zones. PR consultancy partners should be flexible and prepared to work in different time zones during crises. should be tackled with a mechanism of people rotation to ensure workload and sensitivities are well managed.
      - Use professional tone and language at all times with the members of the consulting firm.
      - In case of any disagreement or lack of response, escalate to the senior leader/management of the consulting firm.
   b. Allow the consulting firm sufficient time to respond to deliverables as agreed upon in the communication and outlined in the SLAs. It is recommended that the consulting firm should:
      - Respond to client communications in a timely manner as required and mutually agreed upon.
      - Be respectful and professional in all client communications, whether written and verbal.

6. **Campaign Development and Engagement**
   a. It is recommended that the client should:
   b. Allow the consulting team sufficient time to obtain information, clarification, approvals and inputs for conducting an effective communication campaign. Provide access to necessary resources such as reports, research materials and stakeholders, including spokespeople, to enable the communications team to function efficiently. It is recommended that the consulting firm should:
      - Make available relevant team members to attend these briefings and engage with the client.
      - Ensure that the team members are adequately briefed and updated on the client business.
      - The role of senior leadership in the consultancy should be clearly outlined in the statement of work (SOW) and actively tracked, especially for major campaigns.

7. **Mutual Respect and Collaborative Behaviour: Business Code of Conduct**

a. As a high demanding profession, and due to always-on digital and social media, defining communication cycles, traditional timelines and work timings are under question. Achieving a work-life balance for a consultancy and client is a mutual responsibility. Consultancies and clients are both coping with the pressures from the business as well as the possibility of opportunities or crisis within communications at any point in time.

b. In order to achieve have a healthy work-life balance, will should help build collaborative and respectful culture and keep the workforce productively and efficiently engaged. It is thus recommended:

c. It is recommended that clients should:
- Clearly define timelines with the consultancy and the team, which are mutually agreed and are in sync with work timings on both sides, and shifting the mindset towards realistic timelines on both sides. Incidents of late night, early hours should be avoided and realistic expectations should be cultivated, except in case of genuine crisis where rotational shifts of staff bench should be created.
- Clearly define work expectations over weekends and the responsibility should not be skewed towards consultancy staffing alone, and a mutual team representation, rotation of staff at consultancy is highly recommended for fair play of time and respecting employees' personal time on both sides.
- Respect the scope of work and in case of significant increase, look to enable the consultancy to manage the asks by either providing additional budgets or reducing other campaigns/activities which might be running in parallel.
- Use of decent and professional language and behaviour is always recommended. Abusive language, shouting and rude behaviour is a zero-tolerance zone and in difficult situations related to non-performance or disagreements between both parties should be dealt with maturity and formal feedback and productive criticism.
- Get senior members of the team to address client related issues/complaints, rather than the junior members, who are not experienced enough to take feedback as well as not likely to be empowered or skilled to address them.

d. It is recommended that consultancies should:
- Consider implementing measures such as roster rotation, extra manpower and team rotation to meet the demands of situations that require significant time commitments, such as crisis, big launches and projects. Establish Service Level Agreements (SLAs) on both sides, ensuring adherence to agreed-upon turnaround times to prevent spillover into late or weekend hours.
- As a best practice, consultancies should commit to building archives to alleviate the need for clients to repeatedly address the same issues. In this regard, ensuring that teams possess the requisite capabilities is essential to reduce turnover and the need for multiple revisions, thereby minimizing the impact on working time for both teams.
- Assign senior members of the team to address client issues instead of having junior-level staff interact directly with the client. Respect and adhere to agreed practices of employee leave, silent hours and follow the concept of business hours.

8. **Emerging Technologies, including Generative AI:**
    a. **Ethical Use:** The use of emerging technologies, such as generative AI, should be guided by ethical considerations, avoiding misinformation, and ensuring responsible and respectful application.
    b. **Training and Compliance:** The consultancy should commit to keeping teams updated on the latest technologies and ensuring compliance with industry standards and legal requirements concerning emerging technologies.
    c. **Technology insights:** Rigorous measurement and assessment of the impact of emerging technologies, aimed at providing insights into their effectiveness in achieving communication goals, should be undertaken from time to time jointly by the client and the consultancy.

9. **Influencer Engagement:**
    a. **Authenticity and Alignment:** Both the client and the consultancy bear the responsibility for authenticity of claims and proof points for all communications materials, approved under the due diligence process established irrespective of traditional and new age media or influencer engagement, clearly laid out as part of the contract process. Consultancy partners, on their part, should not restrict themselves from raising necessary red flags with documented evidence regarding content and data points if they seem to be inauthentic.
    b. **Transparency:** Clear guidelines on disclosure and transparency in influencer collaborations and content creation should be maintained, adhering to industry standards and regulations, including records of payments and full disclosure for monetary or barter engagements for the produced or published content.
    c. **Disclaimers:** Clear disclaimers are recommended for content or any part thereof that are created through automation technologies such as generative AI, etc. Consultancies are advised that curated generative AI content should always be supervised and approved through manual inspection and approvals for data sanctity, as well as potential issues related to emotional sensitivities and brand harm.

10. **Performance Metrics:**
    a. The consultancy should provide transparent and universal metrics for campaigns and ongoing measurement, ensuring measurable impact and effectiveness aligned with client goals. It is recommended to move away from AVE, and the consultancy and client should agree on well-defined metrics that measure the impact and outcomes.

11. **Continuous Improvement and Adaptation:**
    a. **Learning and Development:** Consultancies/consultants should commit to continuous learning and development, ensuring teams are equipped to leverage evolving technologies and adapt to changing communication landscapes.
    b. PRCAI members and their clients are advised to keep aside a fixed percentage of their budgets and/or manhours for learning and development in the emerging fields.

c. Based on our SPRINT Annual Industry report, the investment in training is relatively low and it is recommended firms should invest 1.5-2.0 percent of their revenue in training of people within their consultancies.

d. Clients are recommended to offer opportunities to training of consultancy team members where possible for knowledge transfer and required industry sector skills.

e. Consultancies and clients are advised to periodically review their communication strategies and tools, with a commitment to adapting and evolving in response to industry advancements and client requirements.

f. PR consultancies with global affiliations should share learnings and best practices from international affiliates and different domains.

g. Consultancies could explore the possibility of organizing an annual learning retreat involving client and vice a versa, to foster the 'One Team' spirit and collective team learning.