# STACEY ON  ADVER-TISING

stacey | singer

One of the joys of starting my business has been sharing my thoughts regarding clients, agencies, and their unique relationship. This anthology represented my favorite work. I hope you enjoy it. Feel free to share it with the agency enthusiasts in your life. I want to hear your insights, ideas, and recommendations. You can reach me at **stacey@staceysinger.com**.

Enjoy!

Stacey

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# What the Bachelor Can Teach Us About Client-Agency Relationships

I admit it. I watch a lot of Reality TV. I cry at *Say Yes to the Dress* and restage half my house after each episode of *The Property Brothers*. However, I draw the line at *The Bachelor*. I am clearly in the minority, as the show has run for 23 top-rated seasons.

I refuse to watch because it is the least real of any reality shows; while a soon-to-be bride usually leaves with a dress, and a couple gets a beautiful home, 23 seasons of The Bachelor have resulted in two marriages (and a third to a runner-up after dumping the woman picked on air).

Why so little success? Because the basic premise does not work. A person who shines on a fantasy date—like a hot air balloon ride with champagne and caviar— does not necessarily shine in real life.

**Here's the dating reality show I'd like to see:**

For their first date, the couple sets off on a two-hour drive to a mountain cabin for a digital-free weekend of hiking and relaxation. They hit traffic, and the trip takes six hours, including bathroom stops by the side of the road. The cabin bears no resemblance to its online pictures, and it rains all weekend.

On the next date, the couple has to furnish a room from IKEA. They must select the furniture, get it home, and put it together. They end the date sitting on the floor.

On the third date, it gets serious—a friend, parent, or pet is sick. It's helpful to see when the going gets tough, if your date gets going—as in, gone.

I am not saying that couples that ace these dating challenges will get married and stay married. I am saying that if they succeed here, they have a better chance of long-term success because these dates resemble real life.

Which brings me to the agency pitch. The pitch is *The Bachelor* of the advertising world. It meets some emotional needs but is not the best way to select a long-term agency partner.



**Because the skills and behaviors required to win a pitch are different than the skills and behaviors to keep and grow business. Here's why:**

For agencies, pitches are an opportunity to win new business. A winning pitch creates great buzz and can lead to more pitches.

For agency staff, pitches are exhilarating. The best and brightest get to brainstorm without the limits of budgets or legal reviews.

For clients, pitches are an opportunity to get new ideas and invigorate the brand.

They feature big ideas, grand gestures, cutting-edge thinking, and great food.

**Pitches are the hot air balloon, champagne, and caviar date of advertising. Sadly, they don't predict the long-term success of a client-agency relationship.**

Any agency (or date) can be at their best for a few weeks. The real test is how the agency holds up over time in the real world, despite its limitations and frustrations.

Once clients award the business, they have the day-to-day experience of working with the agency. They know the quality of the work and whether it's fulfilling their needs. They know whether they look forward to agency meetings. They know if their brand is in trouble, whether their first call would be to the agency. Or not.

In fact, when a current agency is thrown into a review situation, a great presentation should not override months or years of bad experiences. The reverse is also true: a less-than-stellar presentation should not outweigh actual positive experiences with the agency.

That's why assignments should be awarded based on current agency performance.

This change could have a profound effect on the client-agency dynamic. If new assignments are awarded based on ongoing performance, agencies are encouraged to invest their best talent and resources in current, not potential, clients. Agencies would focus on client satisfaction and experience, brand growth, organic growth, and long-term partnerships. The agency would be incentivized to continue the most expansive part of a pitch—stepping outside everyday assignments and imagining the future direction of the brand. Clients would be happier, more engaged, and focused on brand stewardship rather than agency management. I've seen it happen. I've helped it happen, at several agencies.

Most importantly, it would value long-term partnerships over the quick win. I can even imagine a time when reality TV gets the message: *The Bachelor* celebrating not an engagement or wedding but staying married. That is finale material.

# Client Satisfaction Surveys: 5 Ways to Blow Them. And How to Ace Them

Client satisfaction surveys have become SOP for many businesses. Every call to my bank or stop at my Starbucks is followed up by an automated survey. (By the way - if a visit to Starbucks is the "best part of my day," I consider it a pretty bad day).

Agencies have started to send client satisfaction surveys, too. It's a great opportunity to receive valuable insights on how the agency can improve its work and relationship with clients, creating a foundation for a productive conversation about agency strengths and areas to improve.

Unfortunately, many agencies send client satisfaction surveys so they can check that box, instead of learning and improving. Some agencies rationalize and refute the results as soon as they get them. Their responses include:

**1. *"The results only reflect the past few months, not the entire year."*** That may be true. An agency might earn a positive review in the first part of the year, and then after some staff changes, missed deadlines, or errors, receive a negative review. It may not seem fair, but if it accurately reflects how the client feels now, it has to be responded to as the way things are.

**2. *"The negative feedback is from junior clients. The senior clients love us."*** All clients are important, and all client feedback is meaningful. If the junior clients are unhappy, they will tell their bosses—who eventually will accept the feedback or let them explore other agency options to reduce the noise. Even if senior clients protect the agency, eventually these clients will move on, and the junior clients will take on more responsibility, and likely decide to change agencies. Every client, no matter how new/young/inexperienced, matters. And you may be interacting with them a lot longer than a senior client who may move on, up, or retire.

**3. *"I spoke to the client. We are good."*** Sometimes agencies react to reviews by meeting with clients and explaining why their feedback is wrong. Often, the clients may appear to understand and even agree with the agency. Don't be fooled. Chances are, the client is not in agreement, but has decided not to get into a debate with the agency, since it probably won't matter—after all, the agency asked for feedback and rejected it. Think of it like going to a restaurant and having a bad experience—poor service, bad food—and when the waiter asks how everything is, you say, "fine." Not because it is fine, but because you are not coming back to the restaurant and are not emotionally invested in their success. I once saw a fantastic sign behind the counter at a department store famous for its outstanding service. "Nobody ever won an argument with a customer."

**4. *This is 'as good as it gets.' The client doesn't give positive reviews."*** It's true that reviews can be subjective, and some clients are easier graders than others. And some clients will never give a perfect score for fear that the agency will become complacent. However, in most cases, the less-than-perfect reviews come with real, actionable feedback on how to improve. Ignoring that feedback and assuming your agency is being graded on a curve is a missed opportunity.

**5. *The client doesn't get it."*** Certainly, agencies *can* highlight completed work, awards won, and even sales results, as evidence of their outstanding performance. While these metrics are necessary, they are not sufficient for success. Client reviews reflect the way the client experiences the agency. While it includes the quality of the work, it is primarily a reflection of the way the agency behaves, in both critical moments and everyday interactions, that can earn the clients' loyalty, trust, and confidence, or whittle it away.

If you accept the feedback and respond openly and sincerely, the client who is invested in the agency's success (or even one who isn't) will be impressed and feel that the agency is invested in *them*. Ignoring or rationalizing client input is a signal to clients that the agency is not interested in learning—or the relationship—and is often a precursor to losing the business.

These behaviors can also be applied when clients conduct their reviews of the agency.

So listen calmly. Respond graciously. Discuss ways to improve. Then take action. The next feedback you receive will have a much more satisfying outcome—for both clients and agency.

## Dear Client: I Am Not Your Partner

I have been in advertising for a long time. Somewhere along the way, clients and agencies started referring to each other as partners. I don't remember the month or year, but I feel like the use of the phrase increased as the business became more transactional. I assume this was supposed to make the agency feel better about our changing relationship with clients—the equivalent of renaming second mortgages home equity loans to reduce the stigma of borrowing.

Now don't get me wrong. I have been called worse. When clients refer to me as a vendor, I feel like I should have a stall at a flea market and sell knock-off Nikes. I once met a client whose title was "Commodity Specialist." Her job was minimizing my life's work—that hurt.

By comparison, partner is more acceptable, but I still object to the term, for three reasons:

**1. It is disingenuous.** Clients and agencies are not partners. In accounting or law firms, partners jointly own the business and share in the profits. In marriage, partnership means joint decision-making, like whether we should have children. Or shared decision-making, as in, I pick the movie, and my husband picks the restaurant. There is no client equivalent. I can never say to a client, "You pick the creative campaign, and I get first dibs on the media plan."

**2. It sends the wrong message about the agency's responsibilities and client expectations.** I recently met with an agency to discuss an upcoming client meeting. The team informed me that there was no "prep" needed.

We were partnering with the client to brainstorm new ideas. I explained that the client was flying across the country for this meeting and it is our job to ensure a successful session by brainstorming before the meeting and preparing a variety of ideas for discussion. The client's role is to challenge and build on our ideas so they can get better and stronger. I explained that while we might work together to solve the problem, our roles are different, and the client expects and deserves our leadership.

**3. I am proud of the role we play with clients.** Our job is to assemble an experienced team and provide the best counsel, to help clients grow their business by addressing challenges and taking advantage of opportunities. We function much like a law, accounting, or consulting firm and should be proud of it.

We are not partners. We are trusted advisors.


# Goldilocks and the Secret to Breakthrough Advertising

In psychology, the inverted U theory is used to explain achieving optimal performance. The theory states that there is a relationship between performance and pressure, and the ideal performance occurs when there is just the right amount of pressure—too much or too little can reduce performance.  A similar theory is used in economics and sports. The axes are different, but the "just right" Goldilocks' principle is the same. To create breakthrough work, agencies should consider the inverted U.

All too often, they don't, or can't. Clients often task agencies with assembling teams with deep brand and category knowledge and strong client relationships. Clients consider category and company knowledge and shared goals to be so critical that they are now a central part of the rationale for the increasing number of in-house agencies.

The inverted U theory, and Goldilocks, suggest that too much is not always a good thing.

**1. Market Knowledge:** Team members with in-depth market knowledge are invaluable. They can quickly recite the brands' strengths and weaknesses, the user journey, and seminal events in the industry. They are often the voice of reason. They can also be the voice of "no"—what can't be done, what will never work, what's been tried and failed. They stop the team from dreaming.

Just the right amount of knowledge—enough, so teams understand their brands but not so much that they limit the possibilities – and mixing it up a little— is the key to success. That means refreshing the lineup with successful people from other categories, enforcing "no bad ideas" during brainstorming, and encouraging leaps of faith that, at the very least, display true passion for the business, and might result in a spectacular idea. Consider this: it was not a hotelier that created Airbnb or a retailer that developed Rent the Runway.

**2. Client Relationships:** A strong client relationship is the foundation for great agency work. There must be mutual trust and respect and a healthy dose of empathy. Good agencies understand their clients' perspective, goals, concerns, and challenges and can build a bridge between the clients' world and a big idea. On the other hand, we all know agency people who are too connected to the client. They don't just understand the client—they identify with the client. They mistake their relationship for friendship; they're afraid of losing a friend. It is the agency version of Stockholm Syndrome, and the risk is increased with in-house agencies. These people know their client (in this case, their brand manager) so well they anticipate their reaction and may even hesitate to bring a great idea to presentation. They are afraid to push back for fear that it will hurt their relationship.

Agencies benefit from just the right amount of relationship—enough that there is confidence in the agency and comfort in taking a risk, but not so much that being liked is the primary goal.

**3. Business Tension:** Good agencies know they have to earn the clients' business every day. They understand that other agencies are waiting in the lobby and eager to take their place. Successful agencies use this tension to motivate their teams by encouraging the development of new ideas, without waiting for the terror of a review or pitch. Letting the relationship become complacent—too little tension— also kills agencies, when a crisis catches them napping. For in-house agencies, whose jobs are (relatively speaking) more secure, the lower level of risk can backfire.

Just the right amount of business tension—something in between fear and comfort—produces the best results.

These are essential considerations as agencies build teams. There are benefits to adding the creative with little category experience or moving the account person who was the best man at the client's wedding. In-house agencies have a more significant challenge. The very traits that are valued by their proximity may ultimately work against them. These agencies may find themselves too insular, too comfortable, and too friendly to serve as honest brokers.

Agencies who consider the inverted U when assembling teams have a better chance of creating breakthrough advertising, or as Goldilocks would say, "advertising that is just right."

## Psst! There Are No Client Secrets

Unhappily married couples often try to hide their marital issues from their children. They believe that if they spend lots of time together, or don't argue in front of the kids, they will never know the marriage is troubled. If you talk to their children, most will say the secret was out. Some heard their parents fighting behind closed doors. Others noticed their parents only spoke to and through the kids and not each other.

Agencies believe this, too. They think if they try to maintain appearances, that clients will not detect any issues, with people or processes that everyone at the agency knows are a problem. Talk to clients and the secret is out. They know whatever we know.

**The A-hole:** I worked with a strategist who was very smart but lacked people skills. Everyone at the agency avoided working with him. Somehow, we thought clients would feel differently, or that he would be on better behavior. He was not. He was short with clients and argumentative. He was insulting if the client did not agree with or understand his point of view. He didn't have the emotional intelligence to acknowledge the client's thinking and effectively present his point of view or make an effort to incorporate the clients' perspective. Before long, the client indicated this person was no longer welcome on the business.

**Inefficient processes:** Some agencies have processes and procedures that seem to create friction or delay at every turn. Getting a budget to a client for a routine project takes days. Making a small type change can cost thousands. Ask anyone at the agency, and they will say it is impossible to get things done. It's no surprise that their clients say the same thing—it feels difficult to work with the agency.



**Warring Agencies:** Agencies are often asked to collaborate with other agencies who manage various aspects of the clients' business. These partnerships can create tension as the agencies compete for resources and attention. Everybody acts like they're playing nice in the sandbox, but the stress or animosity is often communicated with clients in other ways. We roll our eyes when members of the other agency speak or give knowing looks to our colleagues. We say things like, "*Our* team prepared our recommendation last week. We are *waiting* on input from the other team, before sharing with you." Despite our efforts, we end up short-handing to the client that we can't work with others on their behalf.

**Disappearing Staff:** Agencies sometimes pull senior staff for new business or to help with peak activity on other accounts, often "juniorizing" with less experienced staff. We include the original team members in the occasional client call or meeting to reinforce their involvement on the business. If the client calls to speak with them, we remind them that there is a lot of work that goes on behind the scenes and that the person they are asking about is busy taking care of their business. I had an account person who was fully dedicated to a client ask me if he could work on a pitch to give him some variety. The pitch was in one week. I thought the change would be positive, and given the timing, go unnoticed. By the end of that week, the client was calling me and asking about the account person's whereabouts. They questioned if he was full-time on their business and why he was not attending meetings or calls. They noticed, and fast.

There are no secrets. The client always knows. Clients know when agency people or processes are problematic. They know when staff are not involved in their business or when we are not working well with others.

The truth is that whatever happens inside the agency communicates itself beyond the agency. We can't avoid it. But what we *can* do is make sure that we are honest with ourselves about issues and address them quickly so that what is happening inside the agency transmits positive signals to the client.

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## "Yes, and" or How to Say No and Make it Sound Like a Yes

An irate client called me from the floor of a convention. He hated the convention panel we had produced and said, "it looks like an impossible-to-read eye chart full of small type." I promised to investigate and get back to him. I told him we would try to redo the panel, and also identify what went wrong so we would not do it again.

I quickly met with my team who were confident in their work. They brought copies of client emails and texts which showed the requests and feedback that led to the development of the panel that the client was displeased with, particularly regarding the small type. Case closed, the team thought.

Looking at all the comments revealed to me:

**1. Legal had added several words of conditional language throughout the copy.** The product would "*help*," which grew into "*may help*." Other additions were "*virtually*," "*making it possible*," "*could*," "*should*," and so on.

**2. The brand team had requested that more product features and benefits be added.** They wanted to make sure the panel addressed all of their target audiences' needs.

**3. In the name of serving the client, the agency team did exactly as the client asked.**

Case reopened.

I questioned our team on their thinking. They told me they had seen two options—saying no or yes. They felt "no" would irritate the client and was not in keeping with our commitment to client service. So they picked "yes."



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I explained that while an outright "no" was not appropriate, "yes" was not either. The result of saying "yes" was a call from a very unhappy client.

I suggested a different approach: "Yes, and…" This approach is often used in improv or brainstorming to drive creative thinking. It can also spur creativity to solve this kind of situation.

**1. "Yes, we can change the booth panel to accommodate the feedback. This is how it will look."**

This approach signals to clients that you hear them, and their input is important. Rejecting the clients' feedback outright is likely to make them defensive and closed to other ideas or suggestions. By sharing a mock-up of the work, the agency can help them understand the impact of their decision—too much copy, resulting in too-small type, and a panel that is difficult, if not off-putting to read.

**2. "And, we have explored other options that meet your objectives and may work better in a convention environment."** The agency can show how these options look and why the agency thinks they might work better to meet the clients' goals.

This approach signals to the client that the agency is thinking ahead, is not merely an order-taker, and has the client's and the brand's best interests at heart.

It also places the client firmly in the decision-making role. When given this choice, most clients will say "Yes" to the second option—no one wants materials that are hard to read or don't convey a clear message—"And" it will result in a stronger relationship where the agency is recognized for its advice and proactivity.

# What Your Email Style Communicates About Your Agency

Is your agency full of email non-responders? Commentators? Forwarders? If so, your agency probably has employees that are very busy but don't get much done. It does not bode well for staff, clients, or long-term success. Here's how I know:

I work with agencies to help them keep and grow business. My work requires a deep understanding of an agency's culture. I rely on all sorts of data to get to know an agency, including employee and client interviews, satisfaction studies, HR and financial data, and believe it or not, emails. Granted, email practices and patterns can be a bit more subjective, but I find them highly indicative of how an agency works.

**These six email personas are a sign of trouble:**

**1. The non-responder:** Does not reply to emails. I am not talking about responding to your long-lost cousin in Nigeria who needs your bank account information. I'm talking about not responding to colleagues and contacts (the non-responder usually treats clients differently). More junior non-responders are often poorly trained or over-whelmed.  Senior-level chronic non-responders want to control attitudes, activities, and accountability. By not replying to emails, the non-responder is communicating—that they are busy and in-demand, that your request will have to wait. They put the burden on the sender to follow up. And because non-responders allow a decision to pass, they have no accountability. If someone else makes a decision, one can only hope it goes well because the non-responder will remind everyone that they "never approved that."

**2. The late responder:** Takes days or even weeks to reply. I am not talking about someone offsite or knee-deep in a presentation, which could explain an occasional lapse in timeliness. I am talking about chronic late responses. This behavior could be due to lack of organization or discipline—or, as with the non-responder, a control issue. And don't be surprised if this practice reflects a larger agency concern, because behaviors spread. If the late responder is never penalized, or worse yet, gets promoted, people figure out: this behavior is acceptable.

(A word about prompt responders: I've found that well-run and successful agencies usually have leaders who are highly responsive to email.)

**3. The forwarder:** Unlike the non-responder, the forwarder replies to every email, explaining that they can't help but will forward your email to someone who can. The forwarder has little authority. They can't decide or advise. Sometimes the forwarder isn't the problem, but a sign of a bigger problem—a hierarchical, bureaucratic agency where only a few people can make decisions. And if the forwarder's emails end up with the non-responder—you guessed it—nothing gets done.

**4. The cc'er:** The cc'er includes lots of people in an email, and everyone is confused. Is everyone required to respond? Is 100% agreement needed? Does not replying equal agreement? I am all for soliciting different points of view and keeping the team in the loop. Broad email distribution requires thoughtful writing—addressing key team members, so everyone knows "the decider," "the advisor," and, most importantly, the person who needs to act next. Unreformed cc'ers can delay decisions as various people weigh in. Excessive cc'ing is often a sign of CYA. Agencies with many cc'ers will claim they are a family, and I agree, a dysfunctional family.

**5. The attacher:** The attacher likes to cross things off their list without considering the impact. Ask the attacher for a budget update, and you will get nine project estimates, four revised estimates, and three emails on the merits of the original budget. Except you requested an update, *not* the information needed to prepare the update. Rampant attachers are a sign of team members who are either overworked or poorly trained and an agency that is not client-centric.

**6. The commentator:** The commentator is usually a very senior person. They reply to all emails to appear engaged, except their comments don't add to the discussion. Instead of offering advice or help, they respond with statements such as "interesting," "too bad," or "disappointing." The commentator leaves recipients wondering what they mean or how to respond.

**To sum it up,** these email personas are not conducive to success. If you are considering an agency exhibiting them, think long and hard before joining. If you work in an agency and recognize you or your colleagues in these personas, start by changing the email etiquette with your team. Establish clear guidelines about sending and responding to email (such as a 24-hour rule); call out staff who don't comply. After a while, the email behavior will change, and the shift will have a positive impact, keeping people and projects moving forward. And movement is what emails are intended to accomplish.

# Clients Are from Mars.
# Agencies Are from Venus.

I am often asked to act as an intermediary between clients and agencies. It is the advertising equivalent of the old *Ladies Home Journal* column, "Can This Marriage be Saved?" I am usually called upon when the relationship is near its breaking point in a last-ditch effort to salvage it. Much like "Can This Marriage," I start by speaking to the agency and the client separately to try to understand each one's point of view and then bring them together to find common ground and a way forward.

I've come away thinking that clients and agencies can avoid much of this tension if they acknowledged the differences in their expectations and focus from the start.

Here are the three main differences:

**1. Agencies focus on the work. Clients focus on the process.**

Typically, agencies highlight the brand strategy they developed, the insight that drove their thinking, and the creative that carried it out. The agency's emphasis on tangible assets is not surprising given the focus on creative in pitches and ongoing work. As proof of their success, agencies cite business results and industry awards.

However, clients expect their agencies to deliver great work, and for that work to drive business. That is why they hired them. For clients, preferring one agency over another is often based on how the client experiences the agency on a day-to-day basis and in critical moments. While clients demand good work, they also want the process of developing that work to be smooth. The classic client comment is, "while the result was good, getting there was painful." No matter how "successful" the creative, clients will also recall the challenges in nailing the idea, team turnover, missed deadlines, and going over budget—to them, evidence of poor performance.

Yes, some agencies acknowledge bumps along the way, but they see those bumps as insignificant in the big picture. For clients, that is the picture.



**2. Agencies focus on what went right. Clients focus on what went wrong.**

We all have cognitive biases that impact our judgment and our recollection of events. The client-agency misalignment is frequently a result of self-serving and negativity biases. The self-serving bias protects self-esteem. We give ourselves credit for success and blame others for failure. We are the hero of our own stories. As a result, agencies tend to take credit for smart work and blame clients for lackluster results. Of course, clients do the opposite; strong work is a result of their guidance and input. Weak results are the failure of the agency.

The negativity bias suggests that negative experiences have a greater effect on our psychological state than neutral or positive experiences, even when the two are of equal intensity. If an agency delivers two creative presentations, and one is spot-on, and one is not, the client will focus on the presentation that missed the mark. If the agency delivers five strong creative presentations and one weak one, the client will focus on the weak one. Clients expect the agency to deliver every time—and the misses are magnified.

Agencies tend to minimize these missteps, particularly if the result was satisfactory. Agencies highlight the "hit or miss" nature of creativity and remind clients, "it's a process." This is not to say that agencies don't also have a negativity bias—they do. They remember every negative thing that the client said or did—which, in turn, helps reinforce their self-serving bias.

**3. Agencies focus on facts. Clients focus on feelings.**

To minimize the self-serving and negativity biases, agencies focus on objective measures when evaluating their own performance. Agencies track the number of projects delivered on-time, on-budget, and error-free. They track savings and the number of incremental projects completed by the team. This quantitative assessment is designed to provide perspective, the agency's way of reminding the client that while one project may have had issues with legal, most did not. It is the agency's effort to make the review fairer.

This exercise is only useful to a point. It neglects that we are human and react emotionally—even when the facts don't fully support our point of view. Yes, maybe only one project had an issue with legal, but perhaps that was the project the client hoped would get them promoted. Agencies pride themselves on service and understanding the human condition. They need to apply those skills to their clients and think about how the agency's actions impact the clients' feelings of trust and commitment.

These differences are not insurmountable. If agencies and clients try to see each other's point of view and acknowledge their shared goals, it will give them insight and empathy into their partner.

The marriage can be saved. And it is so much easier than a messy divorce.

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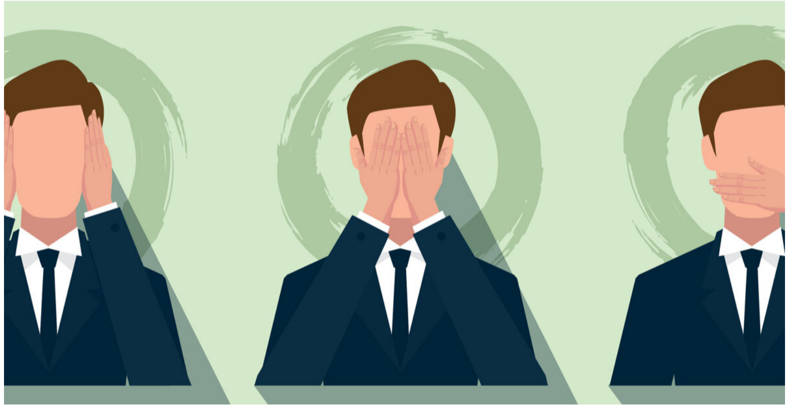


# Client Feedback: When No Response Is a Response

There is a saying that "no news is good news." When it comes to client feedback, this is not true.

Many agencies send surveys regularly to get client input. Done right, these surveys can generate critical insights about the agency's work and relationships. Done wrong, it is easy for the agency to misinterpret the data and focus its efforts in the wrong places.

One of the frequent mistakes that agencies make is not being more attentive to the clients who don't respond to surveys. Agencies assume these clients are too busy to answer the survey, are survey-averse, traveling, or that they have already told the agency everything it needs to know. In some cases, this may be true. In other cases, the lack of response may signal a low level of engagement with the agency. These clients are not interested in giving feedback because it's likely they are not invested in the relationship. Sometimes, they have already decided to move on and don't want to waste their time discussing the details. It is the client version of ghosting.

This behavior may seem unfair, but it is not uncommon. Consider if you have ever gone to a restaurant and had a bad experience. You wait for your table, the staff is rude, the service is poor, and the food is cold. When the waiter asks, "How is everything?" You respond, "Fine." You say this, not because it is fine, but because you don't care and have decided you are never going to this restaurant again. Sometimes a client's non-response is a "fine." It is a way not to engage, and it is bad news. Statistically, clients who do not respond to surveys are less likely to work with the agency in the future.



Agencies cannot force clients to respond to surveys, but there are things an agency can do:

**1. Talk to your clients about the importance of feedback and your willingness to receive it, good or bad.** Encourage them to complete the survey and, if they do, acknowledge, and act on their feedback. The only thing worse than not asking for feedback, is asking for feedback, and then not doing anything with it.

**2. Review response rates by company, office, and brand.** Sometimes agencies celebrate a positive overall score, only to find that the results do not include responses from many clients in a large office or aren't from every account. Without complete feedback, the results may be worth acknowledging but not representative of the overall business. Agencies must conduct a white space analysis to determine gaps in the review and pay attention to areas with little or no feedback when reviewing results.

**3. Review past feedback, if available, and see if it was more robust.** A declining response rate might signal survey fatigue (clients are receiving surveys from many agencies, as well as their gym, dog walker, and doctor.) Diminishing returns often reveal the need for continued communication of the importance of the survey and assurance of the agency's response. Declining client feedback is another warning sign of a declining relationship.

**4. Engage non-responders in meaningful discussions about performance.** It is critical to solicit feedback from these clients. It is also essential to ask questions that solicit more than the "fine" response. For instance, you could ask, how does our agency compare to others you work with currently? Do they envision working with your agency in the future? Would they be willing to recommend your agency to others? Specific questions like these are likely to generate a more meaningful discussion, again, provided the agency has established that they are open and receptive to the answers.

If agencies take these steps, they are likely to get more feedback, accurately interpret it, and respond to the feedback they receive. Then they will avoid another saying: "out of sight, out of mind."

## Let's Make Agency Meetings Great Again!

In the last few years, there has been a movement to reduce the number of agency meetings. Many internal meetings are considered a waste of time, energy, and money. The trend has also extended to client meetings, aided by the ability to meet online rather than in person.

I agree with the need to eliminate bad meetings—whether they are live or online, internal, or with the client. However, I think agencies are missing an opportunity—that is, to encourage great meetings.

Great meetings have many benefits:

**1. Connection:** My most meaningful client relationships are the result of spending lots of time together discussing the brand's challenges and opportunities. Our interactions resulted in a deeper understanding of each other, lots of adventures, and inside jokes. Conference calls rarely create this type of bond. Agencies often lament the decline of client-agency relationships. I suspect the deterioration reflects the decline in spending time together.

**2. Concentration:** Participants on conference calls often multi-task. It is difficult to get their full attention (or avoid the sound of typing). This lack of focus is unfortunate for the agency that prepared the work and the client who paid for it. If a meeting is live, clients are more likely to focus—and the agency has more recourse. I remember one client who kept checking his phone and texting during a meeting. I stopped the presentation and told him we understood if he needed a few minutes' to take care of other work. It let him know that our team deserved his full attention. This exchange wouldn't have been possible if we hadn't been together in a room.

**3. Context:** It is very challenging to gauge a client's response to an idea or recommendation on a conference call. A video conference is a bit better, but still less than ideal for detecting micro signals like a furrowed brow. In a live setting, the agency can read body language and redirect the meeting. A comment such as, "I sense you disagree, tell me why" can change the course of the discussion and the outcome.

**4. Chance:** When I am on-site with a client, I often learn new information, which makes the agency and me a better partner. In person, clients are likely to share more information, ask me to sit in on other meetings, and introduce me to new people. All of these lead to better work and more opportunities.

**5. Comic relief:** Great meetings should have an element of fun. Clients have very stressful jobs, and agency meetings have the potential to break the script. I am not suggesting that a budget session is a laugh riot, but agencies are unique in their ability to create an engaging meeting.

Great client meetings should incorporate many of the best practices used for pitches:

- Have clear objectives and an agenda. Every agency attendee must understand the purpose of the meeting and their role in attending.
- Include the smallest number of attendees to accomplish the goal. If the meeting has too many people, often, no one decides or is accountable. Include too few people, and critical expertise could be missing.
- Practice meeting hygiene. Start and end on time. Book the right size room. Make sure all needed equipment is there and working. Assign someone to take notes. If food is served, consider everyone's dietary requirements.
- Smooth out any wrinkles. Rehearse the presentation. Have all research available. Send pre-reads in enough time to be read. Scenario plan the agency's response to the clients' comments and Q&A.
- Recap and follow-up. Meeting notes should be sent within 24 hours, with a clear summary, action items, owners, and timing. Make sure all items are completed.

You'll learn the only thing better than having a great meeting is enjoying the great results.

## To Have A Big Impact, Agencies Must Sweat the Small Stuff

Self-help experts have long instructed people not to sweat the small stuff. The basic philosophy is that by not focusing on life's little annoyances, we can reduce stress and improve our lives. This might be true for individuals but not for agencies. For agencies to succeed, they must do the opposite: they must sweat the small stuff. Every client interaction—every phone call, email, invite, estimate, and meeting—must be as error-free and on point as possible. Why? Because the small stuff has a big impact on clients' perceptions of the agency. This may seem unfair, but it is true, and can't be avoided because:

**1. The small stuff happens all day, every day.** No matter how large and active an account, the number of deliverables is small relative to the number of agency interactions. A busy account might have 100 interactions a week, including calls, emails, teleconferences, invites, meetings, workshops, etc. This equates to over 5,000 interactions a year. Every client interaction is an opportunity to impress or distress. Every client interaction speaks volumes about the agency's character and competence.



While I have worked mostly on the agency side, my experiences as a client have been enlightening. An agency I worked with on a complex project did a great job on the core deliverables but drove me crazy. They were late for every call. Emails were full of errors. Invoices were incorrect. Eventually, I fired them. Was there one major thing that killed the relationship? No. It was death by a thousand paper cuts.

**2. The small stuff is a proxy for the big stuff.** Clients assume that if an agency can't successfully manage the little things, it can't handle the big things. The logic goes that if the agency's emails have typos and grammatical errors, it is hard to trust them to write a website. If the agency can't manage a planning meeting, can they be trusted to manage the sales meeting?

The agency could argue that emails are sent quickly and without the benefit of being proofread. This argument might hold for an occasional error, but not chronic sloppiness. And anything written by computer has a built-in spell check to catch at least gross errors (cue the red underline). Can you think of any other field where poor performance on everyday tasks yields bigger, more critical work? Imagine hiring a painter to paint your home after doing a poor job on your bathroom.

**3. The small stuff is a trigger.** Clients are human. Agency interactions often cause emotional reactions. Clients are paying the agency and expect and deserve a high level of service. Logically, they may know that an agency that is late for a web conference may be having technical issues or finishing a call with another client. But emotionally, the message is, the agency does not respect me or my time, the agency is not committed to my business, or the agency is not competent (hence, the tech issues and poor planning).

Agencies must:

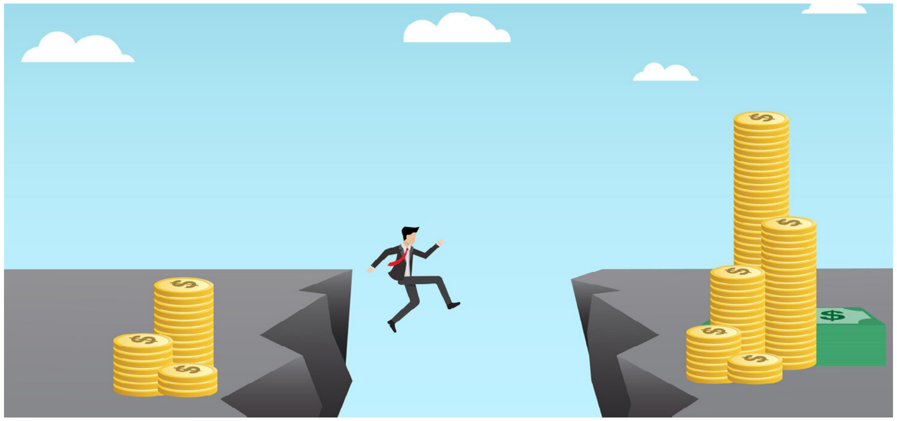
Embrace the idea that every client interaction counts. Don't accept or rationalize behavior that might portray the agency negatively

Set expectations and standards with staff. Let them know the criteria for a good meeting or a proper email. Have regular workshops, if necessary

Model the desired behavior. Leaders who are late or poorly prepared can't ask for more from their staff

Ensure that your systems, services, training, and incentives all reinforce excellence and success. If your outsourced accounting services save the agency money but routinely send invoices with errors, the agency is signaling what counts, to both its clients and staff. Make sure every link in the chain is strong

Agencies that have mastered the small stuff are much freer to land and keep the big accounts.



# Agencies: Hate Project Work? Act More Like an AOR.

Most agencies hate project work because it's less predictable and harder to manage and staff. What's more, agencies believe project work negatively impacts the agency-client dynamic, with agencies treated more like vendors than partners, and their contributions focused on tactics rather than strategy. The relationship can feel transactional and shorter-term.

And in truth, many agencies have experienced business declines as project work has increased. In my view, these declines are not from an increase in project work, but more about the detrimental way agencies respond to it, such as:

**1. Managing project budgets in isolation.** Of course, this is the very definition of a project-based relationship. Each project is budgeted and managed independently. For clients, the intent is to increase the transparency of agency costs, help them better manage their budgets, and determine the relative value of tactics. Agencies that have embraced this model are carefully managing every change in assumptions, thereby triggering a budget increase.

So is it a win-win? This approach's upside is that it holds clients accountable for any changes, ensures proper staffing, and often drives revenues and profits.

It could be a win-loss. The downside is that it ignores the fundamentals of client-agency relationships. Each transaction does not exist in isolation. Each is part of a broader context that includes everything that came before, and everything expected going forward.

The focus on budget encourages many agencies to discuss compensation before anything else. The message clients receive is that the agency's business is more important than the client's and that the agency does not value the relationship.



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I once worked with an agency that lost a very large account after the client asked for additional framed copies of an ad, and the agency responded by preparing an estimate. The agency allowed $200 framed ads to blind them to the larger picture.

**2. Staffing each project independently.** Agencies may argue that the shift to projects has made it more challenging to staff. True, it can be difficult to predict needs longer term and account for peaks and valleys in the work. These agencies use the increase in project work to justify continuous staff shifts to maximize utilization and maintain margins. Unfortunately, this approach causes agencies to give up a critical competitive advantage—brand knowledge.

Historically, agencies have maintained staff on an account over time. Changes were orderly and viewed as natural transitions. Agencies often helped onboard new clients with everything from competitive reviews to brand history, which clients valued and appreciated.

The current pick-up game approach to staffing is less efficient and prone to error since the staff is not expert on the brand. This practice reduces the cost of clients changing agencies since they are likely to have to onboard the agency team, current or brand new.

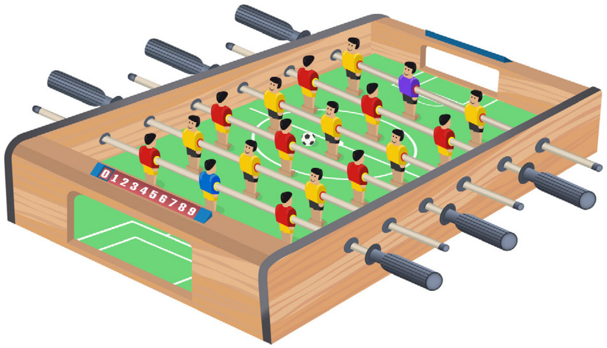
**3. Managing the project, not the result.** Many agencies handling projects consider their work complete when they hit "send" on a deliverable. The client is left to determine if the project has met its objectives, or if refinements are needed. Agencies argue that they are not being paid enough to stay involved in the project or monitor its effectiveness.

Again, it's a missed opportunity because evaluating performance is a chance to demonstrate the agency's commitment to the brand and identify opportunities. It also ensures that the agency will be tapped to build on the work going forward.

**So what should agencies do? Act like an AOR.** Think of it as new business without the competition. Staff the brand as consistently as possible and require staff to know the client, category, and brand. Offer market monitoring and program evaluation as standard operating procedure. Even if clients are not willing to pay for them, the incremental work they generate will more than cover the cost. Consider client requests and changes in the context of the total relationship. (As my dad says, "Don't step over dollars to pick up pennies.")

Finally, remind staff that clients embrace project-based work as a billing mechanism, not as a framework for the relationship.

Agencies that have a project mentality signal to clients that they are not committed to their business. Agencies that show they are committed will grow their own business.



# Will COVID-19 Destroy Your Agency Culture or Reinvent It?

Culture is the only sustainable competitive advantage that agencies have. After all, most agencies produce the same types of work the same way—and often with the same people (we all know it is a small industry). That is why an account, strategy, or creative person can move from one agency to another and immediately contribute. Culture is one of the most important differentiators—it makes one agency succeed and another fail.

A well-designed culture benefits staff, clients, and the agency itself. Companies with well-designed cultures have more engaged employees. High employee engagement is correlated with better employee health, happiness, productivity, and retention. In turn, high employee retention drives team continuity, deeper brand knowledge, and enduring relationships—all of which promote greater client satisfaction, revenue, loyalty, and growth. That impacts the bottom line. Companies included on Forbes' "Best Places to Work" list significantly outperformed the S&P 500.

**Unfortunately, many of the traditional ways to communicate agency culture are gone, at least for now.**

Agencies typically relied on their physical office space and in-office rituals to short-hand their culture. Glass partitions signaled openness. Ping pong and foosball tables equaled fun. Dogs and new babies visiting the office meant family-friendly. Conference room names were signals, too. Some rooms were dedicated to great innovators—others were named for people who demonstrated the qualities the agency valued most. I know an office where teams sat at round tables to reinforce their commitment to a 360 approach and democratic leadership.

The sudden shift to working from home and Zoom has robbed agencies of many of these in-office cues. Given that agencies will likely be WFH for many months (and may never return to having all employees together in the office), agencies must reestablish their cultures for a remote environment.

To do this, agencies should answer three questions:

**1. What are the agency's values?** Values are the shared beliefs that guide agency and employee decision-making. Agency values should be unchanged by COVID. However, it is probably a good time to check-in and review. The fewer and more specific the values, the better. Some agencies value "*resisting the status quo*" or "*going all out*." Others highlight a "*better together*" community or encourage an "*entrepreneurial mindset*." All are important attributes that can differentiate agencies, provided the values are clearly articulated, actionable, and demonstrated in agency behaviors big and small.

**2. Do your agency behaviors still bring your values to life?** "*Going all out*" can still be expressed by staff being on time, on camera, and professionally dressed (from the waist up) for all client Zoom calls. An agency that places high importance on the team might make extra efforts to ensure that all departments are included on calls, emails, and sign offs on critical documents. Team check-ins and activities can continue, only virtually. After all, culture is the sum of an agency's actions.

Agency behaviors may need to be reexamined or communicated to reflect the "new normal." When employees were on-site, norms were communicated through a combination of written agency policy and observation. Employees quickly figured out how things worked, from meeting etiquette to managing conflict. With everyone working from home, it's essential to make sure norms are established and communicated. There may also be "new norms" necessitated by these clearly abnormal times: Are employees expected to work from 9 am to 5 pm? Can employees flex their hours to accommodate personal demands? Are expectations different for employees with children at home? Aging parents needing care? Isolated singles? There are no uniform or easy answers to these questions. Agencies should look toward their values for the appropriate response.

**3. What are the agency's rituals?** Rituals and recognition encourage behaviors that bring the culture to life and strengthen relationships among staff. I worked at an agency that valued community and commitment. Every year on an employee's work anniversary, they would receive flowers with one rose for every year of employment. The ritual was always the same. The call from reception ("We have something for you"), the proud walk back to your desk with your flowers, fellow staffers congratulating you on your milestone, and team members reminiscing about "memorable" colleagues and clients. The simple act of receiving anniversary roses set off a chain of connection and good feeling. So how to replicate that during COVID? Agencies must be very deliberate about deciding what rituals and recognition should be kept, updated, discontinued, or started. There are opportunities to be creative. One agency sent an employee celebrating their 10th anniversary a video of clips from teammates recalling their top ten list of special moments.

COVID has robbed us of a lot (seeing a movie on the big screen) and given us a lot (the joy of doing a puzzle). It does not have to rob us of agency culture. In fact, it can be the impetus for creating something more meaningful and enduring.

## Zurprise and Zelight: Surprising and Delighting Clients in a Zoom World

In the old days (about 12 weeks ago), agencies focused on surprising and delighting clients. They understood (the good ones, at least) that delivering work on time and on budget was the price of entry. Client retention and growth required a higher level of thinking, service, creativity, and connection.

Understandably, when agencies closed their offices, the focus shifted to delivery. Agencies made sure that employees had the equipment and tools needed to produce client work. The results were a huge success. Most agencies reported that the transition was seamless. Their teams worked together (sometimes better than in the office), and work was delivered on time and on budget. Clients were hugely appreciative and quickly became accustomed to working this way.

Some agencies considered this "mission accomplished" and turned their attention to new business. However, agencies cannot take existing clients for granted, especially since some budgets are shrinking due to the pandemic's effect on the economy. Agencies must maintain their focus on driving their current clients' business in what still are challenging times.

**Having mastered remote delivery, agencies must focus on mastering surprise and delight in a Zoom world.**

This is unchartered territory. It is up to the best agencies to create. Here are some ideas:

**1. Set strategic goals:** It is easy for the team to default to delivery and lose sight of longer-term strategic priorities. Agencies should work with clients to set monthly goals to address brand challenges and explore new audiences, channels, ideas, and messages.

**2. Keep it fresh:** While many of us are enjoying the benefits of working from home, the days can become monotonous. One Zoom meeting blends into another. Agencies should use their inherent creativity to add some zip to Zoom meetings. Just as agencies are experimenting with new approaches to pitches, current clients deserve the same attention.

**3. Take advantage of the new intimacy:** Agencies pride themselves on their ability to develop deep client relationships. WFH creates new opportunities as you view everyone's bedroom, office, or children in the background. You may discover that your client loves cats, plays the guitar, or collects stamps. Lean in. Create a connection by sharing personal videos of new team members, planning an occasional icebreaker (show me your shoes!), or competing for the most diverse bookshelf, oldest office supply, etc.

**4. Remember the real world:** With so much of our lives managed in front of a screen, there is a craving for old-fashioned experiences where we can see and touch things. Send clients sweatpants and face masks with agency logos. Frame a copy of the latest ad. Send balloons and a cake to celebrate the most recent launch.

**5. Manage strategy the way you do tactics:** Clients' most frequent critique pre-COVID was that agencies did not generate business-building ideas proactively. Today's economic climate makes this activity a must. Agencies should use the discipline, tools, and planning they use to implement tactics (weekly status meetings, project management, resource management) to ensure ongoing strategic thinking. Agencies must assess program results, industry news, competitive activity, and market dynamics for new learnings and recommendations.

**6. Rethink assumptions:** The events of the last few weeks have radically changed consumer thinking and behavior. We do not know if these changes are temporary or permanent. Agencies should partner with clients to understand new consumer mindsets and implications for brands. It is an opportunity to help clients create their next normal.

And yours.

## Agencies Are Great at Creating Narratives. Now They Must Write Their Own. Carefully.

Agencies sometimes create aspirational ads and press releases as a tool to help clients envision a successful, alternate future. *Now* we can imagine headlines like, "M&M's redefines retail in Times Square," or "CVS takes a stand on health by eliminating cigarette sales." But before these were realities, they were possibilities—and research suggests that *seeing* a possibility makes it easier to achieve.

When done well, these aspirational exercises are rich in detail and create an overarching narrative—about the change in approach, the process forward, the challenges, and the outcome. They are compelling stories that people can visualize, remember, and share. Later (when the plans have been implemented and are successful), these stories become the foundation for corporate communications, reinforcing the company's culture, history, and values.

We have all heard compelling corporate stories. A Zappos sales representative stayed on the phone with a customer for 10 hours. Neiman Marcus once refunded a customer for a set of tires, although the store doesn't sell tires. Both stories illustrate the companies' commitment to customer service and define expectations for customers and employees.

Early in my career, I worked for an agency whose founder started the company with big aspirations. He leased a large space to reflect his dreams but had no money for furniture. The founder often recounted that in the early days, every time a client visited the agency, he moved the furniture in from his home and had his relatives sit in the office, posing as employees. I have no idea if the story was true, but it was repeated often enough to reinforce the company's origin story and the importance it placed on resourcefulness and positive thinking.

In the midst of COVID-19, agencies are rewriting their narratives. Like the agency that immediately shifted all their clients' communications online, with appropriate COVID-19 messaging. Or the agency that created job shares so employees could home school their children or take care of sick loved ones. The agency whose senior team cut their salaries to keep the rest of the staff employed. There are other stories, too, on the flip side—of the agency that immediately furloughed staff, leaving clients who are already unsettled to work with a new team. Or the agency that interpreted the shelter-in-place order as an opportunity to expect employees to work 15-hour days and penalized those who resisted.

This is not to say there will not be difficult decisions, as this crisis continues—there will be. Sometimes organizations need to sacrifice a foot to save the rest of the leg. Much of this situation is out of our control, but agencies do have control over how they treat employees and clients. Their leaders can be open, honest, and empathetic, communicating in virtual town halls, emails, and small group discussions. They can present options and work with staff and clients on solutions. The decisions agencies make now will become their story for a future article, "*How Our Agency Handled the 2020 Pandemic*."

What should agencies do? They should do what they have done for clients for years—create a vision for tomorrow. Write the narrative from the perspective of 2021 and contemplate how the agency handled the crisis of 2020. Imagine the article printed in Ad Age or the details recounted on Glassdoor.

<u>Then agencies should ask themselves:</u>

1. Is the narrative from the future consistent with our current actions?

2. What does the narrative say about the agency's culture and values?

3. What does the agency need to start doing? Stop doing?

The answers to these questions will help inform the story and confirm your path forward. It is a narrative we never expected to write—but now we must imagine it to achieve the best possible future.

## Notes, thoughts, and ideas…

## About Stacey Singer

I love agencies and believe, when they are at their best, they are unmatched in the value they can bring clients. My 25+ year career has given me a unique perspective on what drives client retention and growth.

I have successfully led and grown multiple agencies specializing in different marketing disciplines from advertising to market research—and in varied business situations from a 3-person start-up to a 1,000 person turn-around.

Before starting my consultancy, I developed and led an industry-first global, client satisfaction program for the world's largest marketing communications company. This work gave me great insight into what clients value most and how agencies can differentiate themselves.

I now help agencies keep and grow business. My work includes consulting and training on an account, office, network, or holding company level.

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