Keys to a Great Client/Agency Relationship

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CLIENT AND AGENCY BEST PRACTICES

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Expectations can't be met if they aren't understood. Whether you are a company that has just hired a digital marketing agency for the first time, or you're an experienced agency embarking on a new project with a repeat client, it is important that everyone involved is on the same page: about project goals, expected outcomes, and how you are going to get there.

In this guide, we have identified five building blocks of a client/agency relationship. We've also provided some best practices from both perspectives to help ensure your next project delivers a positive experience, successful results, and you avoid becoming the next digital marketing horror story.
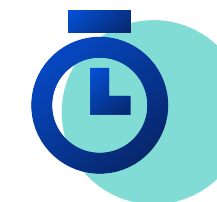
Goals and KPIs

Overall goals. Key Performance Indicators (KPIs). Targets. Establishing what you want to achieve and clear ways to measure progress must come before anything else.

CLIENT:

Identifying your KPIs is a good start, but you also need to set targets to make them meaningful. Specific KPI targets help avoid confusion, or worse, ambiguity.

Establish an agreed-upon time frame for your goals. How long will you have to prove success? Let your agency know, so they can build a strategy to achieve results within those parameters.

In addition to establishing your immediate desired outcomes, share your big-picture goals and KPIs with your agency. The more information they have about how this project fits into your larger strategy, the more successful they will be.

AGENCY:

Do not underestimate the discovery process! Making sure you understand where your client is coming from helps you better determine a true goal, as opposed to what the client might *think* they need.

Do your competitor research. Make sure your client understands who they are actually competing with, not who they assume they are competing with. And help align goals and KPIs accordingly.

Tell clients when their goals are unrealistic. Working toward outcomes that aren't feasible leads to frustration and sets everyone up for failure.

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Budget and Scope

No matter how large or small a project is, the budget is always a sensitive topic. But it's something that has to be discussed right off the bat.

CLIENT:

Come to the agency with a clear understanding of what you want, and what services you need.

Have some goals in mind to help articulate what you're trying to achieve.

Establish a preliminary budget., even if it's a ballpark; this provides a realistic starting point for negotiating scope of work. It also allows your agency to dial in their recommendations to something attainable within your budget parameters.

AGENCY:

Be prepared to lead with a budget recommendation. If a client hasn't worked with a digital marketing agency before, or if they aren't used to managing a budget like this, they might need some help.

Make sure that your project's budget and scope of work are directly related to your client's engagement goals. This allows you to easily justify resource allocation, and provides tangible results to measure against.

Confirm that you have an accurate understanding of your client's resources and capabilities, and a clear expectation of the division of labor. Knowing who will be responsible for different components of a project will help form a more realistic budget.

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Time and Resources

One of the biggest sticking points between agencies and clients is a misunderstanding of the amount of time a project will take, and the resources needed (and available) to complete it.

CLIENT:

Be realistic about your company's internal bandwidth available for things like client input, review periods, turnaround times, etc.

Be sure to include the appropriate stakeholders in conversations that would benefit from their expertise, and make sure you have designated staff on the project that has power over decision-making and implementation.

Establish priorities early. Being clear about what is time-sensitive and what can wait will help your agency understand what is important to you, and prioritize their work accordingly.

AGENCY:

Do not overcommit or set unrealistic deadlines for your work; establish feasible turnaround times for both you and your client.

Ensure you have identified the appropriate client resources for decision-making, implementation, etc. to streamline the process.

It's key to walk clients through what your workflow will be like, so they know what to expect, and when.

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Communication

It's not just about how often you communicate, but WHAT you communicate as well.

CLIENT:

Start your project with a unified direction and vision (e.g., understanding internal politics, capabilities, ownerships, etc.) This guarantees that your company's stakeholders are on the same page about things from the get-go.

Establish your internal points-of-contact for the agency as soon as possible. Understanding roles and responsibilities will streamline communication efforts between everyone.

Confirm your process and deliverable expectations with your agency upfront; this helps avoid frustration and future scope creep.

AGENCY:

Prioritize face time! In-person meetings build rapport and help avoid miscommunication, (the misunderstood tone of an email, anyone?) And if being in the same location is tricky, opt for a video conference over a lengthy email chain.

Learn which deliverable and reporting formats work best for the brand and do your best to mirror them. It's all about speaking your client's language!

Celebrate wins, even if they are just milestones toward the larger goal. Showing impact and giving credit boosts engagement and builds client loyalty.

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Transparency

Open and honest conversations and feedback are vital parts of a successful business relationship. No ifs, ands, or buts.

CLIENT:

Be upfront about your concerns, or any past horror stories that have still got you shaking. When your agency knows about any negative experiences you've had, they can help mitigate those fears.

If you disagree with a suggested change that you don't want to implement, tell your agency, and why. Don't leave them guessing. And if you don't understand a recommendation, ask for more information on how it will affect your goals and budget.

Sometimes, internal goals change. If that happens, make sure your agency is aware of the shift, so they can adapt their time and strategy appropriately.

AGENCY:

When suggesting changes for your client to implement, be forthcoming with the "business impact" or value proposition, and how the work will create change in their marketing channels or user experience to help them toward their goals. What might seem obvious to you, might not be to them.

If mistakes are made, acknowledge them quickly. And regardless of who is responsible, come with a solution, or a plan to find the solution.

Remember that sometimes your clients won't, or can't, be transparent. Keep your eyes and ears open for indicators of bigger issues that might potentially impact the project.

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Conclusion

Whether you work for an agency or you represent a client looking to hire a digital marketing team, keep these five building blocks in mind when you begin your next project. Following these best practices will go a long way in setting goals, budgets, and expectations, and establish open and honest lines of communication between all stakeholders.

Avoid becoming a digital marketing horror story; focus on building a mutually-beneficial partnership that sets everyone up for success, and builds positive relationships that last. And leave the scary stuff to the movies.

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