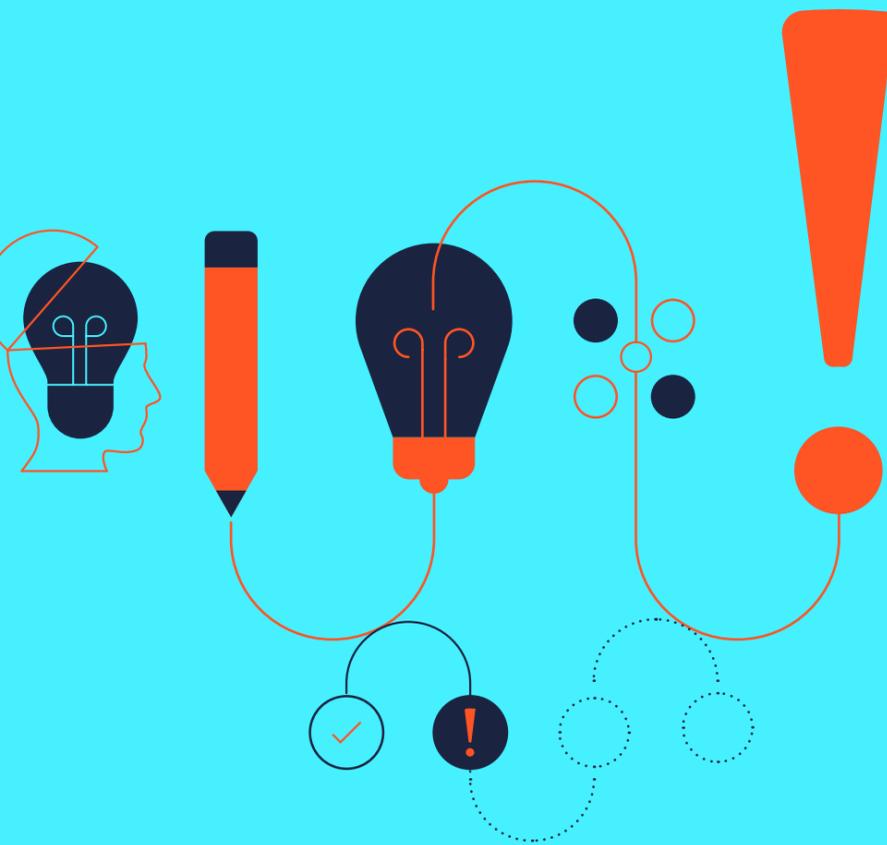




Pinwheel

pinwheelcontent.com
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How to partner with a creative agency

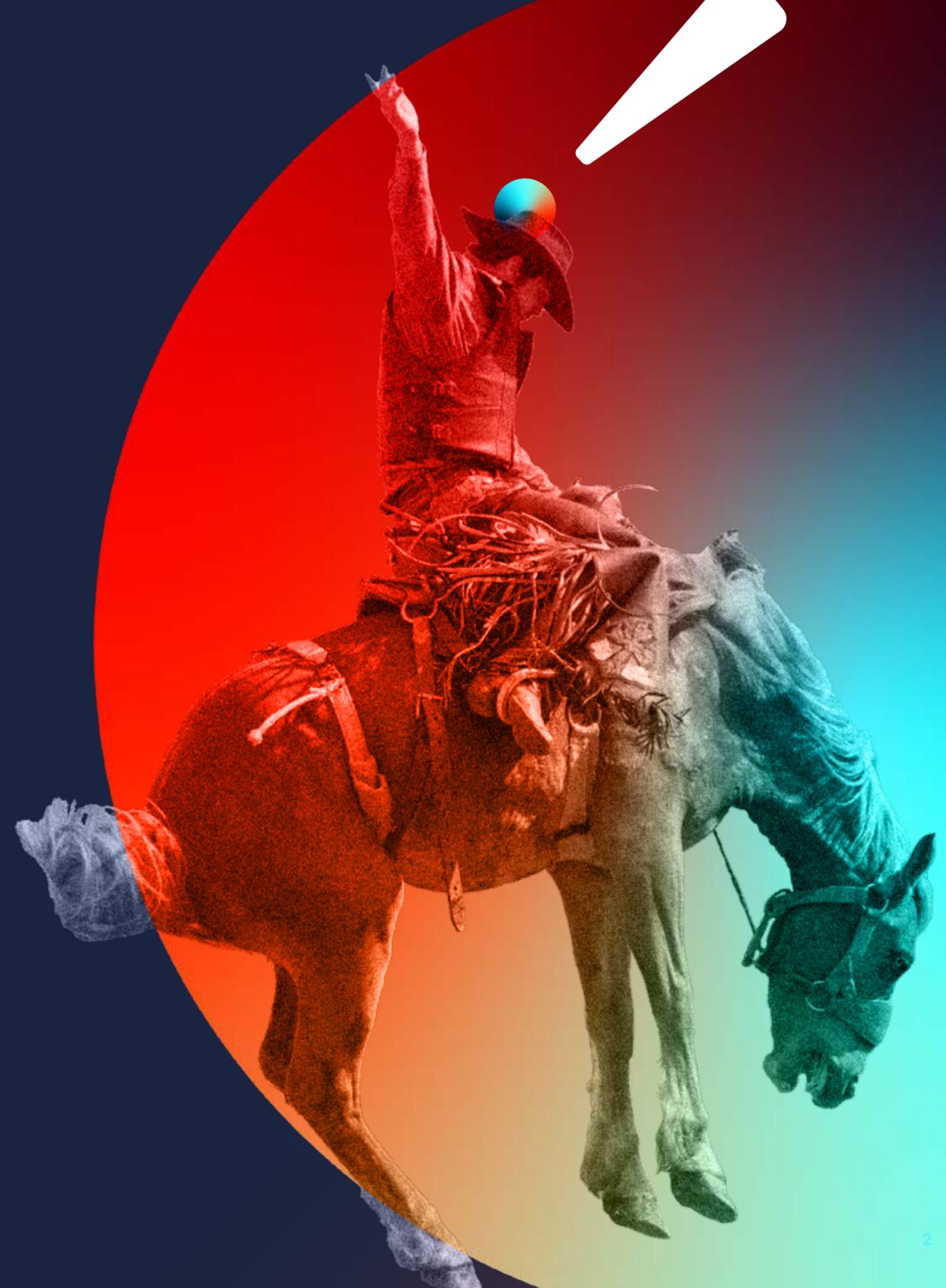


Agency management... it's a whole thing.

Creative agency management is a legitimate skill you can find on job descriptions for VP Marketing types and CMOs. That's because established companies have learned that managing these relationships properly has everything to do with how much money they spend, how powerful the work is, and how quickly that work gets done.

It's not uncommon for clients to walk away frustrated from relationships that they themselves have mismanaged (though there's often culpability on both sides). It's a huge waste of money and time.

This guide will help you avoid that situation and ensure your projects are the envy of all your peers.





**It's a
relationship
built on
trust.**

Hiring an agency can be tricky. You have to decide rather quickly whether they are to be trusted. If you're wrong, it will cost your company money, time, and maybe even its reputation. Obviously, this will make you look bad. Conversely, a good agency well-managed can make you look like a flippin' rock star.

When choosing your agency, focus on the ones that:

- Ask astute questions and truly listen to your answers
- Show an aptitude for learning your world quickly
- Speak with you, not AT you
- Readily admit what they can't help you with
- Have multiple long term relationships with clients
- Don't use a lot of hyperbolic language to sell you
- Have been recommended by people whose judgement you trust

Once you choose an agency, it's a good idea to tip-toe into that relationship one project at a time until you know they're trustworthy. Pick something meaty, yet manageable. Something in the \$10K range perhaps.

What you should look for in an agency.



Great ideas



Straight talk



**Full
transparency**



**The full
attention of
senior people**



**A good
understanding
of strategy**



**Open ears,
open minds,
helping hands**



**Once you choose
your agency, focus
on managing that
relationship well
so you don't waste
time and money.**

Let's meet your agency.



Creatives: Designers, copywriters, animators, illustrators, and editors. These people are social scientists, psychologists, philosophers, persuaders, advocates, comedians, fixers, and makers all wrapped up into one person. Their job is to get the audience's attention and deliver results.



Accounts: Your counterpart on the agency side. Their job is to understand you, manage your expectations, help you reach your marketing goals and ensure the projects are profitable for the agency.



Producers: The puppetmaster. This person's job is to set projects up for success, run them, and ensure they're delivered on time. They're often the ones peppering you with logistical questions.



Strategists: Their job is to understand your audience, inspire the creative team, and improve the thinking in your plans, briefs and the creative work itself.



Owners/GMs: At a small agency, these folks might be wearing some of the other hats mentioned here

as well as finance, people opps, recruiting, and new business. As you can imagine, they tend to be spread thin. They're motivated by making you happy, making their own people happy, doing great work, helping to make your brand famous, and improving agency profitability.



We'll go through each one of these in the pages to follow, but to summarize, here is how you ensure a successful client agency relationship that produces great work on time and on budget:

Understand your role as a client

Onboard your agency right

Give them a sense of your budget

Understand the creative process and mindset

Start every project with a well-crafted brief

Have kick-off meetings

Allow them time to do good work

Minimize the number of approvers

Learn how to give useful creative feedback that makes the work better

Invite a healthy debate

Remember that you hired professionals

Know when to keep them and when to fire them



**How to
manage
your agency.**



Your role as a client.

As the client in this scenario, your role is to set your agency up for success. This includes, but is not limited to:

- ✓ Providing the right information going into the project
- ✓ Helping to shepherd the work through your organization while minimizing rounds
- ✓ Providing on-time feedback
- ✓ Helping the agency to drive the project forward

Onboard your agency right.

The agency onboarding process is key to ensuring success, and that your projects go smoothly and are done in a relatively short amount of time. Most clients do a giant data dump... and this is fine. Know that the agency has to digest that information. Give them time to do that.

In addition, you'll want to provide them with information to help them operate seamlessly with your organization. This removes friction and makes projects cheaper, faster and better. Brand guidelines, org charts, internal processes, working styles, technology preferences, and so on, will all be helpful.

They should be providing you with information about how to work with them, too.



Why agencies need to know budget.

Creative work is about working within a set of constraints, and your budget is one of those constraints. Some clients, on the other hand, feel that divulging their budget will make them vulnerable to agency greed—that the agency will mysteriously estimate the project at the precise amount of the aforementioned budget, minus \$10.

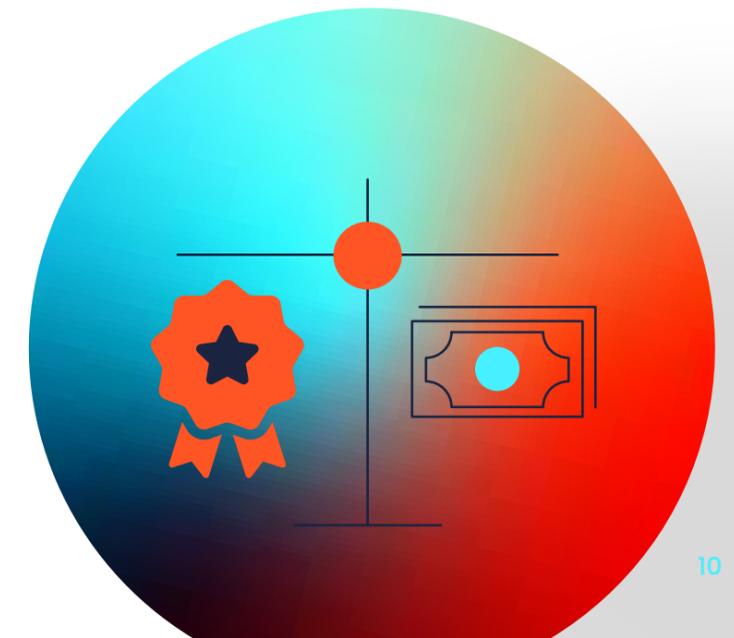
In this classic catch-22 scenario, most agencies toss out a reasonably decent price to do an average job. Or, alternatively, the client low-balls the agency with their budget

in an effort to flush out what the agency's floor might be. In both of those two likely scenarios, you will get crap work.

Part of the time, and therefore the budget, should include exploring the world of possibilities, incubating a good idea, and workshopping the execution. A lot of client work is missing these key ingredients—this thoughtfulness—because the agency didn't value their worth enough in the budgeting process or the client was trying to get the work done as cheaply as possible.

If you want great creative that will last, you can't leave that out. Which means you can't limit the budget to a range that precludes the great ideas.

The better question is, how much are you willing to spend to be successful?



Process dictates everything.

Bad process leads to more rounds of revisions, project delays, work product you can't use, and relationship friction all while driving up the cost of projects. You don't want that and you probably can't afford it either.

Good process is carefully designed to help you avoid the extra revision rounds, give creatives the opportunity to do their best work, keep projects on time and on budget and ensure the relationship is a positive one for everyone.

What this looks like is that project owner thinking carefully about their project request, articulating it well, allowing the agency to determine the schedule (if possible), and having an intelligently-architected approval structure.

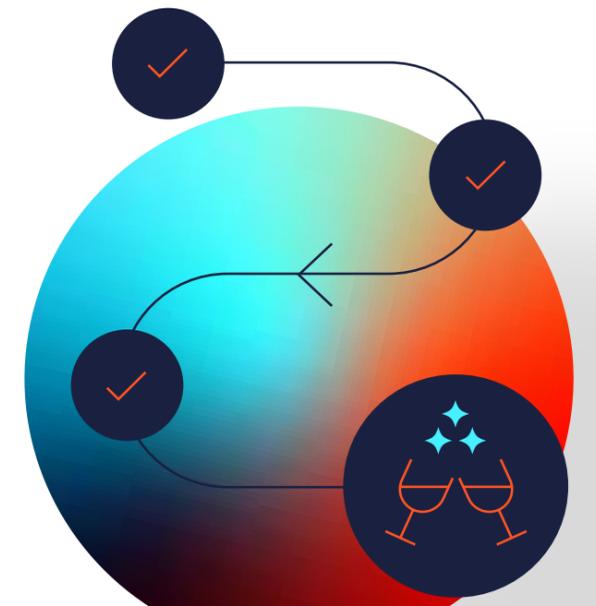
Things that interfere with good process include:

- Bad creative briefs
- Miscommunication
- Too many fire drill projects
- Too many approvers
- The swoop and poop (execs with major last-minute changes)
- Mid-project scope or strategy changes
- Strategy changes

Part of good agency management is good project management.

The agency is half the equation, too. They need to ask the right questions, properly scope the project, set clear expectations with their client, create realistic timelines, staff the project with the right people, manage them, adapt when necessary, and communicate well at every stage.

When it works, it's a beautiful thing. Once you have the machine well-oiled and humming, you can start to feel the momentum in your business.



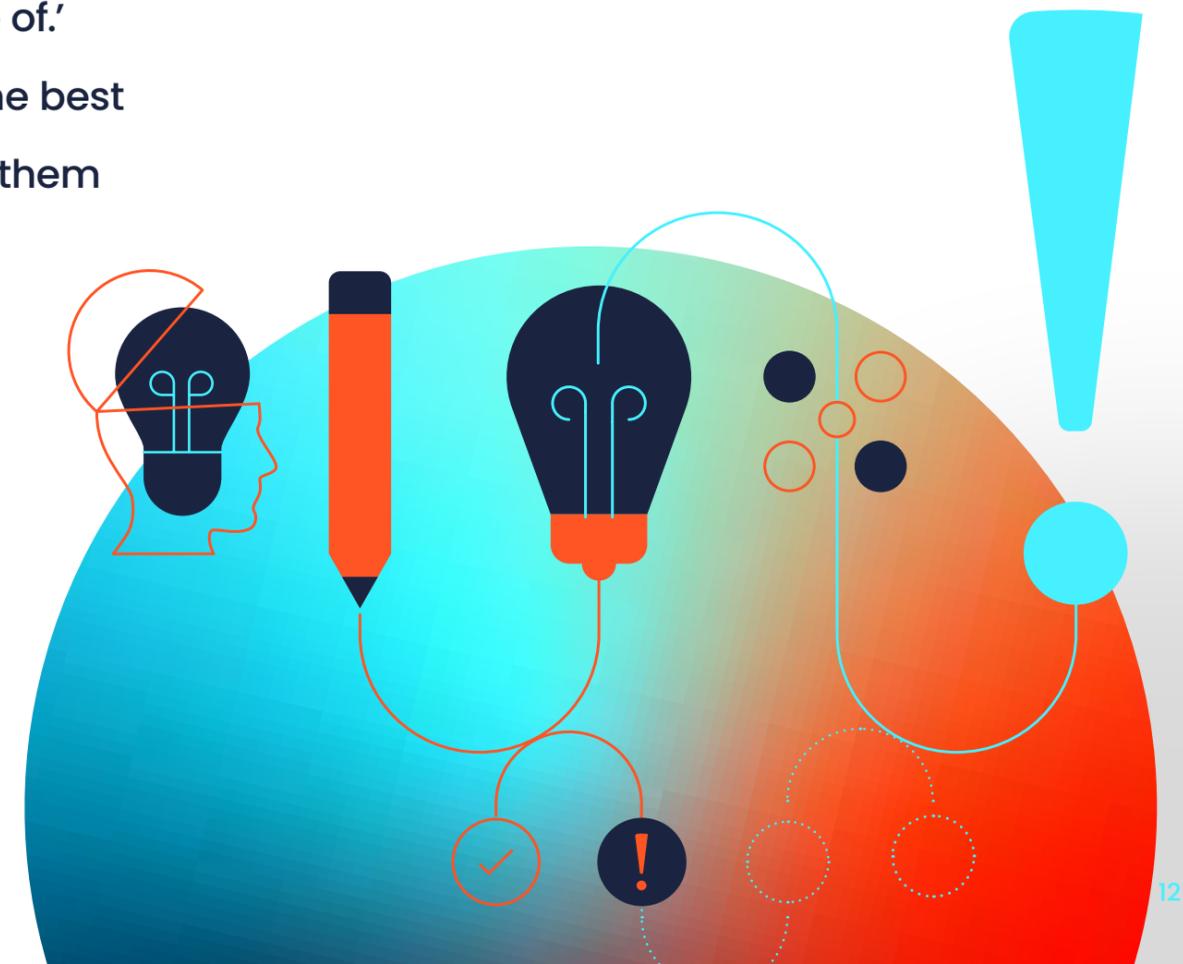
Understand the creative mindset.

Agencies hire talented, creative folks like copywriters, designers, art directors, illustrators, etc. Having worked with hundreds of them through the years, I can tell you... they are not your standard flavor of ice cream. If you want to partner with these strange and exotic creatures, you'd be wise to understand their quirks and predilections so you can help coax the best work out of them.

They're explorers, artists, judges, warriors, and perhaps most especially rebels. Yes, they'll skylark in your meetings. They'll doodle on your presentations. They pummel you with

questions. They're inherently unruly and sometimes hard to understand. The best ones are a willful, thoughtful kind of cantankerous sort. Malcolm Gladwell observed that all innovators depend on a fundamentally disagreeable nature. They're not obnoxious as such, just 'willing to take social risks – to do things that others might disapprove of.' They're an acquired taste. And to get the best work out of them, you very much need them to have their heart in it.

They might just make you famous.



How good creative is made.

Clients who are well informed about the creative process help ensure that projects run more smoothly. Projects that run smoothly tend to cost less, make work more fun, and lead to better quality, more effective creative.

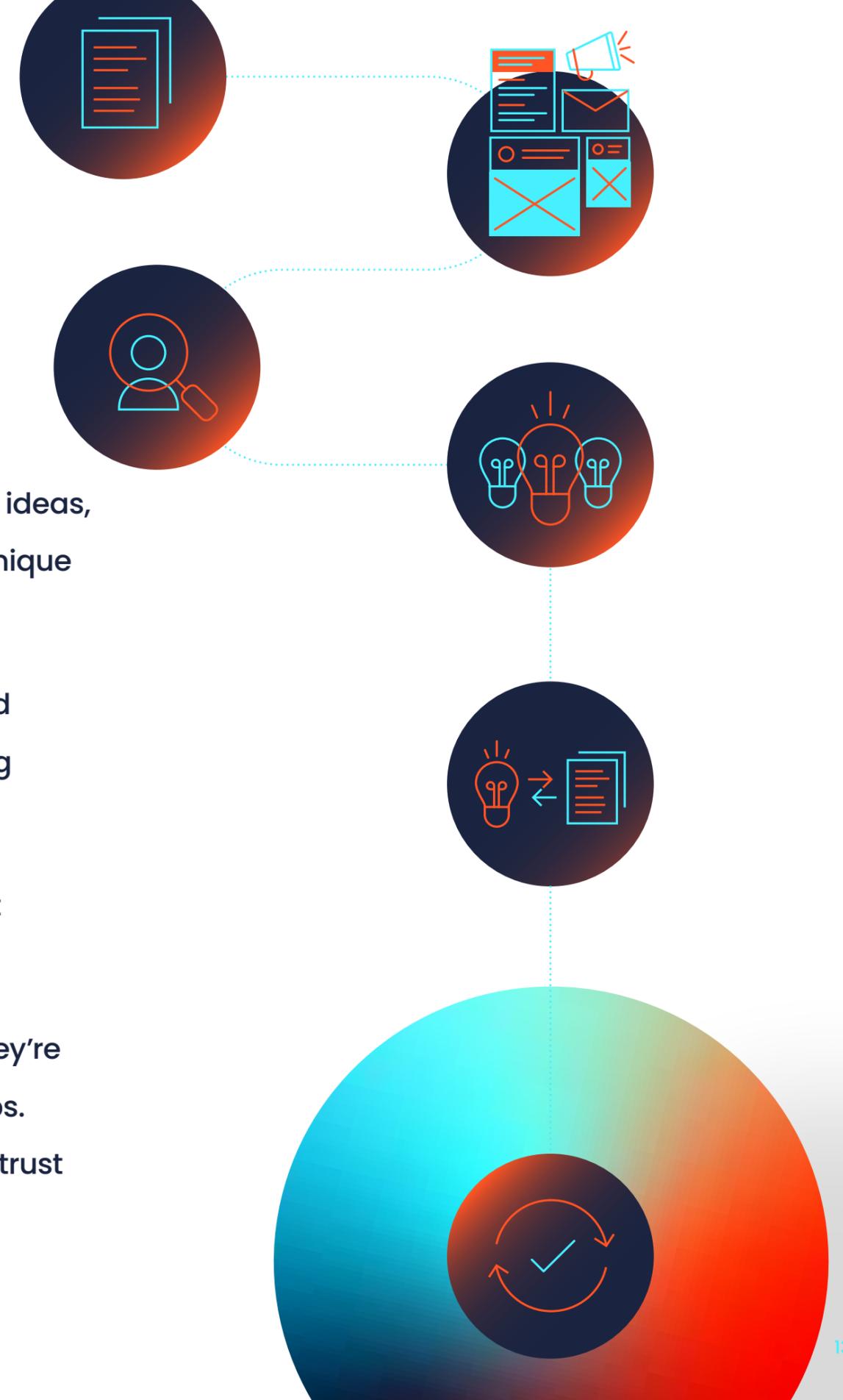
It isn't magic and it isn't art - it's a craft.

Understanding proper process will help you understand the craft. So ask your agency what their creative process looks like. Here's Pinwheel's:

1. Client briefs us in.
2. We work hard to understand the project and all of its dimensions.

3. We think about the audience... a lot.
4. We spend time exploring the world of ideas, looking for concepts that are fresh, unique and mesmerizing - and on brief.
5. We present our ideas to the client and discuss them as a group - comparing them against the brief.
6. We iterate from there until the project is done.

Many companies think that, because they're in a hurry, they can skip or combine steps. We've seen this movie many times and, trust us, it does not have a happy ending.



A person's hands are shown holding a dark blue book titled "THE CREATIVE BRIEF". The person is wearing a dark top. The background is a gradient of blue and green. The book is held up, and the title is clearly visible on the cover.

THE
CREATIVE
BRIEF

Creative solutions come from an agreement (aka, the brief).

Before your creative agency starts its work, they need to be clear on the problem: the goals, the audience, the message and the assignment as a whole. In case you haven't guessed yet, I'm referring to a thing called "The creative brief."

If you don't have a creative brief or know how to write one, your agency can certainly help you there. But the important thing is that you all agree on the problem, audience and strategy first before they do the work. Otherwise, you wind up with a muddle.

Pinwheel's now famous (not really)

[Creative Brief template](#) is available for free.

Tried and true briefing tips.

Luminous, not voluminous. A data dump is too unfocused. Just include information pertinent to the project.

Accuracy is critical. The brief is the bible for the product, so every tiny detail matters.

Provide context. Your creative team needs to know what we've said to the audience already, what we want them to do next, and how this piece fits into the entire communication stream.

Offer audience insights. The real meat of the audience section of a brief is about how the product or service would fit into the audience's life. Why would they want it? Why would they want to change what they're doing already? You need at least one core human truth.

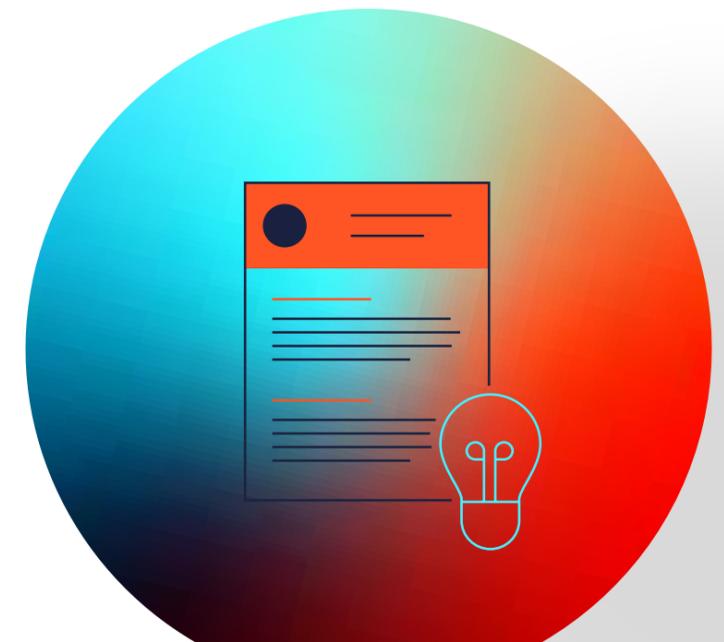
Make it simple. The best creative briefs use raw, simple language your mom could understand.

Have a single-minded message. You can be brilliant with one simple message - maybe two. Any more than that and you get a muddle. For example, "Fast" and "Easy" are two messages.

Check your thinking for consistency. Is your strategy aligned with your objective? Does the single-minded message line up with the proof points? Does everything map back to the key audience insight?

Meet face-to-face. Give your creative partners the opportunity to probe your brain and you will be rewarded with the best ideas.

Get the brief approved internally. If someone hasn't seen the brief, then they don't have the context they need to properly assess the creative.



You haven't truly briefed the creative team until you've done it in person (video chat counts).

For the creative team, the kick off meeting is an opportunity to ask clarifying questions, probe creative strategies, and get all of the information they need to complete their mental model of the project.

Very often, it's something that is said in these meetings that sparks the brilliant idea that generates the results that gets you noticed and leads to your success.

So don't skip 'em.



Have kick-off meetings.

Minimize the number of approvers.

Clients can be very democratic and often don't want to leave anyone out of marketing projects. But the democratic approach leads us on a long, expensive journey. More changes, more rounds, more time, and more money. The quality of work also suffers because no five people are going to agree exactly. This invariably leads to unnecessary compromises that dilute ideas and more rounds of revisions.

Savvy clients use the RASCI model and assign various co-workers the following roles on projects:

- **Responsible** for the job. Typically one person who PMs the project from the client side.
- **Approver**. Would be best if this was only one person, and this role should be assigned up front.
- **Support** the project team.
- **Consult** for their point of view. This feedback is optional.
- **Inform** about the outcome of the project. Not part of the process.

With **RASCI**, everyone gets a role, everyone feels included, and the project runs smoothly. High fives all around.



When I explain the RASCI model to clients, I see their eyes light up. Because, with RASCI, you can still seek other people's opinions. But it doesn't mean you have to agree."

—Paul Burns, Former Agency Executive, Client Trainer

Sometimes the agency's first swipe at a project is bang on. But more often, getting to great is a collaborative process between client and agency. When the agency presents its work, it's an opportunity to collaborate with them on what the solution should be. Here are some tips for ensuring the work gets better instead of worse.

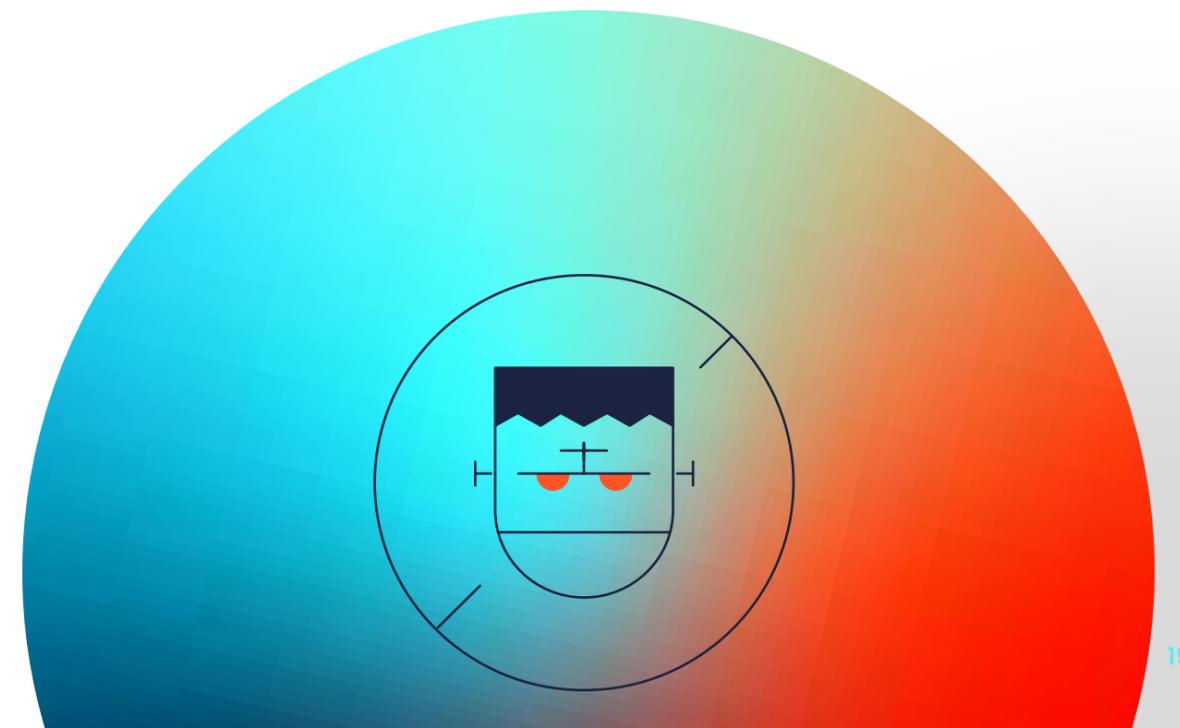
- 1.** Ask the team to explain their rationale. How did they get to the solution and why do they like the idea.
- 2.** Start with what you like about the creative work. This is useful for the team to know.
- 3.** Remember: It's not really about what you think, it's about what the audience would think.
- 4.** Consider whether your feedback is objective or subjective and avoid offering subjective feedback.
- 5.** Consider posing your feedback as a question.
- 6.** Be specific and give the reason for your feedback.
- 7.** Ask yourself how (and whether) the creative executes against the brief.
- 8.** Ask yourself if it's consistent with the brand.
- 9.** Don't solve the issues, just point them out.
- 10.** Be kind, but be honest and direct.
- 11.** It's okay to say, "I like it. No change. Approved."

11 tips for giving creative feedback.

Avoid Frankenstein solutions.

When a client likes more than one idea the agency has presented it's tempting for them to take aspects of each and mush them together into one. Sometimes this can happen when two or more client stakeholders like more than one idea and an attempt is made to compromise by taking aspects of each and weaving them into a single solution. Everyone feels included (yay!) and yet the work is a monstrosity (boo).

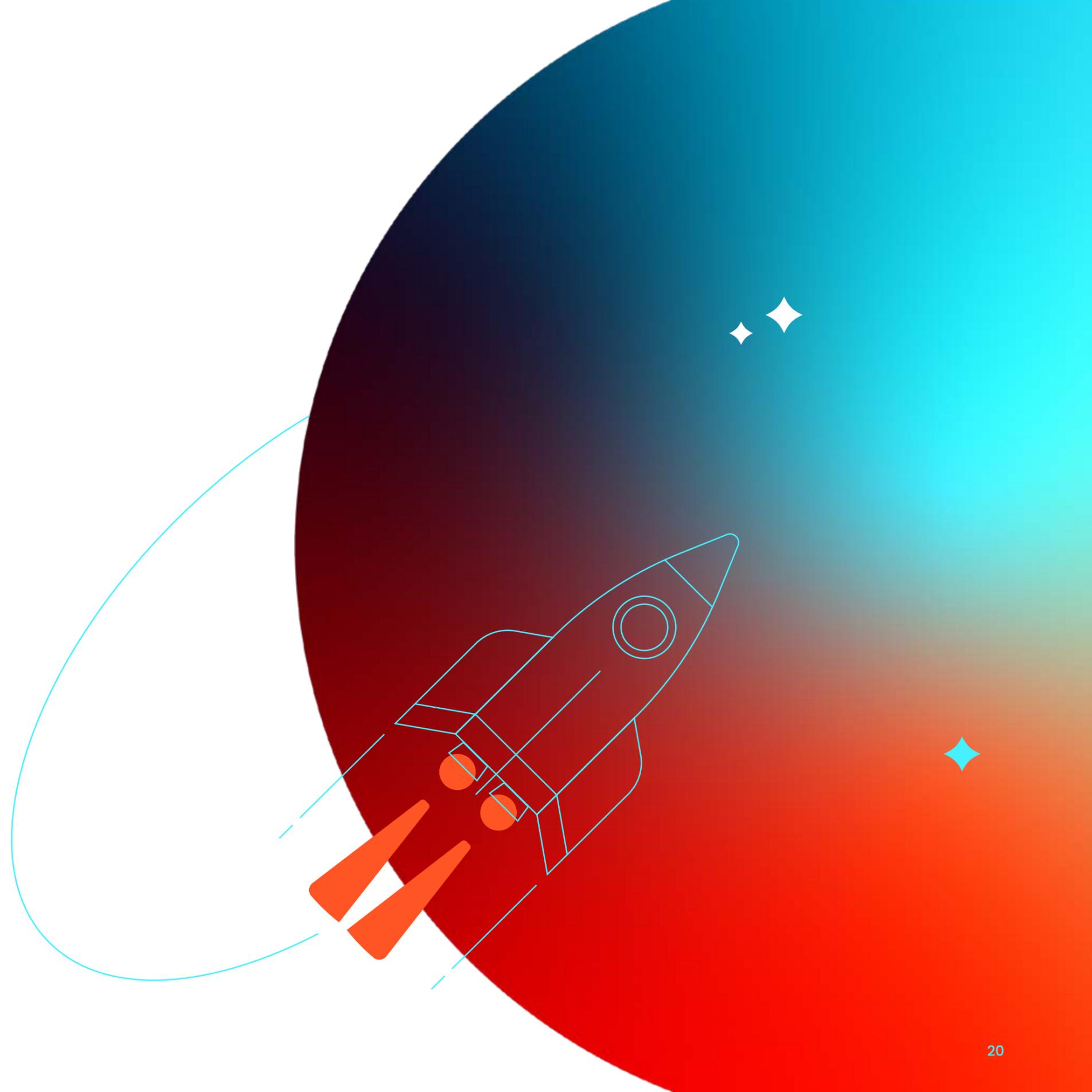
Speaking generally, each concept is a self-contained unit – a cohesive whole – where every aspect has been thought about in relation to every other aspect. This goes for the copy, design and creative strategy in general. By treating them like one big buffet of things, clients often create an ungodly mess. It walks and talks, but it does not make sense.



How the work gets better.

Sometimes clients assume that providing feedback means pointing out what they see as flaws. But course correction is only one small part of it. The feedback step is also an opportunity for client and agency to develop a better mutual understanding. Ask them about their decisions and they'll be happy to explain their thinking. Feel free to share your philosophy about what works and what doesn't.

Each time you go through this process both agency and client should be better informed for the next project. As mutual understanding blossoms, the work gets better and can be done more quickly.

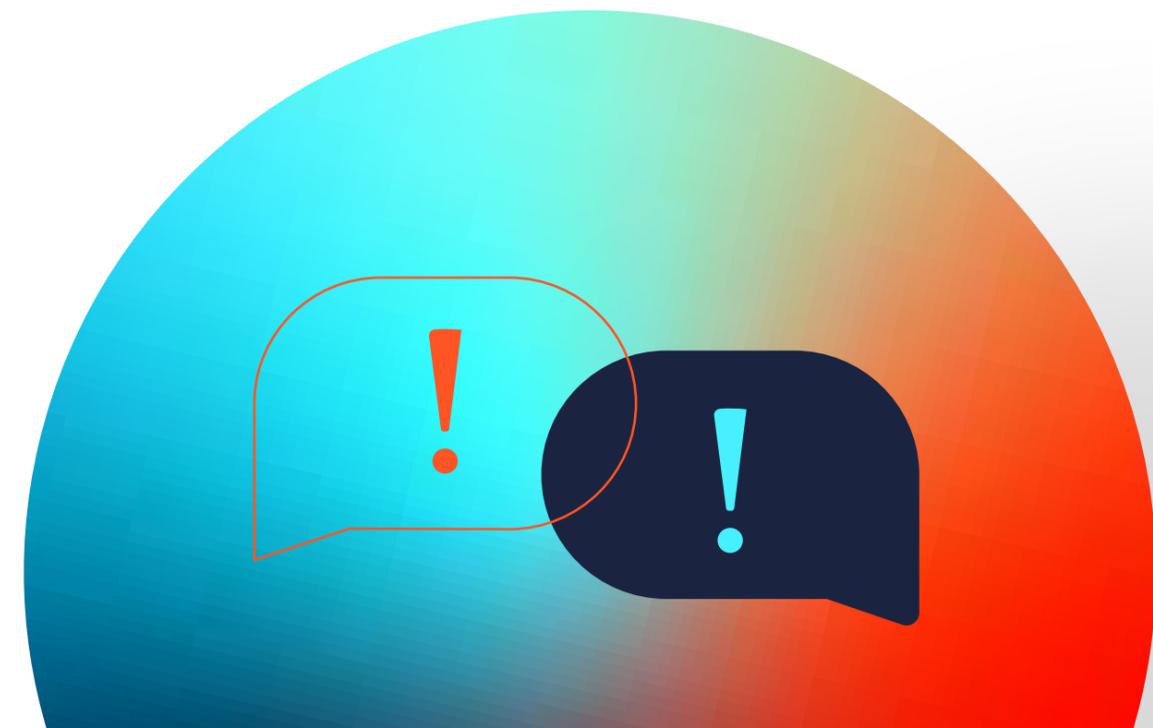


Invite a healthy debate.

For the most part (and contrary to popular belief), agency egos are not THAT fragile. They really just want to get it right. Create a safe space and invite disagreement. Don't be afraid of hurting their feelings and they won't be afraid of hurting yours. As with Socrates, the goal of such disagreements is not to win an argument but to arrive at the truth together. The client relationships that lead to the best work are the ones where there is healthy debate.

One nice benefit of these little debates is that it often helps the client understand the creative team's thinking and choices, which often are not readily obvious when looking at the work.

To harness the wisdom and passion that everyone in the team has to offer, you need a spirited exchange of ideas. True collaboration includes some discord and the best solutions often require trading strongly held opinions in a respectful way.



Good work takes time.

We don't know much about accounting, so we're unclear how many hours it takes to do our taxes.

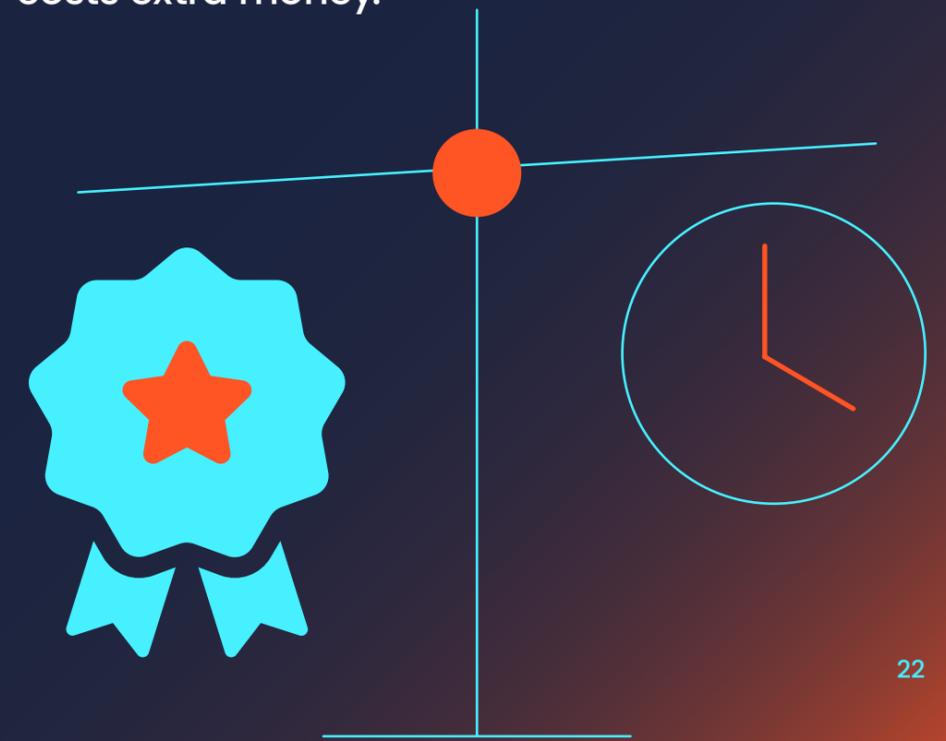
Similarly, consider the fact that you may be unaware of all of the steps that go into doing a good job on your company's marketing. There's ideation, iteration and culling down of concepts. There's writing, design and collaboration between the two. There's proofreading, quality assurance, and creative direction. There's project management, meetings and revisions, revisions, revisions. Agencies have already explored every

shortcut imaginable to get to the schedules that they propose. They know how fast you can push something before it starts to shake apart.

And let's not forget about the client's role in the process. One of the most common mistakes clients make is to assume that they just pass a project off to their agency and check the box. Unfortunately, that's not how it works. As a client, you will need to review the work, shepherd it through the appropriate reviews at your company, and organize the feedback. When clients fail to take this into

account, it causes mayhem in their work schedule, delays the project and causes anxiety for everyone.

It can also cost your agency money because they've spent time organizing resources around a particular schedule and slotting the work into the matrix of agency projects. Schedule slippage might require them to onboard new resources to the project which costs extra money.



How to judge the creative work.

Clients often subconsciously pretend that they're the audience for the work. By doing that, they substitute their own sensibilities, opinions, preferences, biases and perceptions for those of the expert AND the audience (and, in doing so, often stray from the brief). When you add five client approvers to the mix, all with their own subjective lenses, the work tends to suffer quite a bit. But if you can't use your own opinions to judge the work, then how do you judge the work?

Two suggestions:

1. Channel your audience: Creative work is only as good as it is interesting and persuasive to your audience. Your feedback to the agency should be grounded in your perceptions of what the audience might think.

2. Use the brief: The creative brief was the bible for the project. It was the way in which you set your agency up for success. So if they strayed from the brief or perhaps misinterpreted parts of the brief, that's where you help them course correct.

Fresh, intriguing, captivating and truly unique creative work is an incredibly fragile thing. It's easy to kill. Like a beautiful little lamb. It needs protection. It needs a police escort. It definitely does not need personal feelings about the color blue.





**Remember
that you hired
professionals.**

You're a smart person who's been around the block. But if you want to be successful, you first need to surrender to the notion that you actually need the help of professionals. Doing compelling creative work takes certain skills and a whole lot of practice.

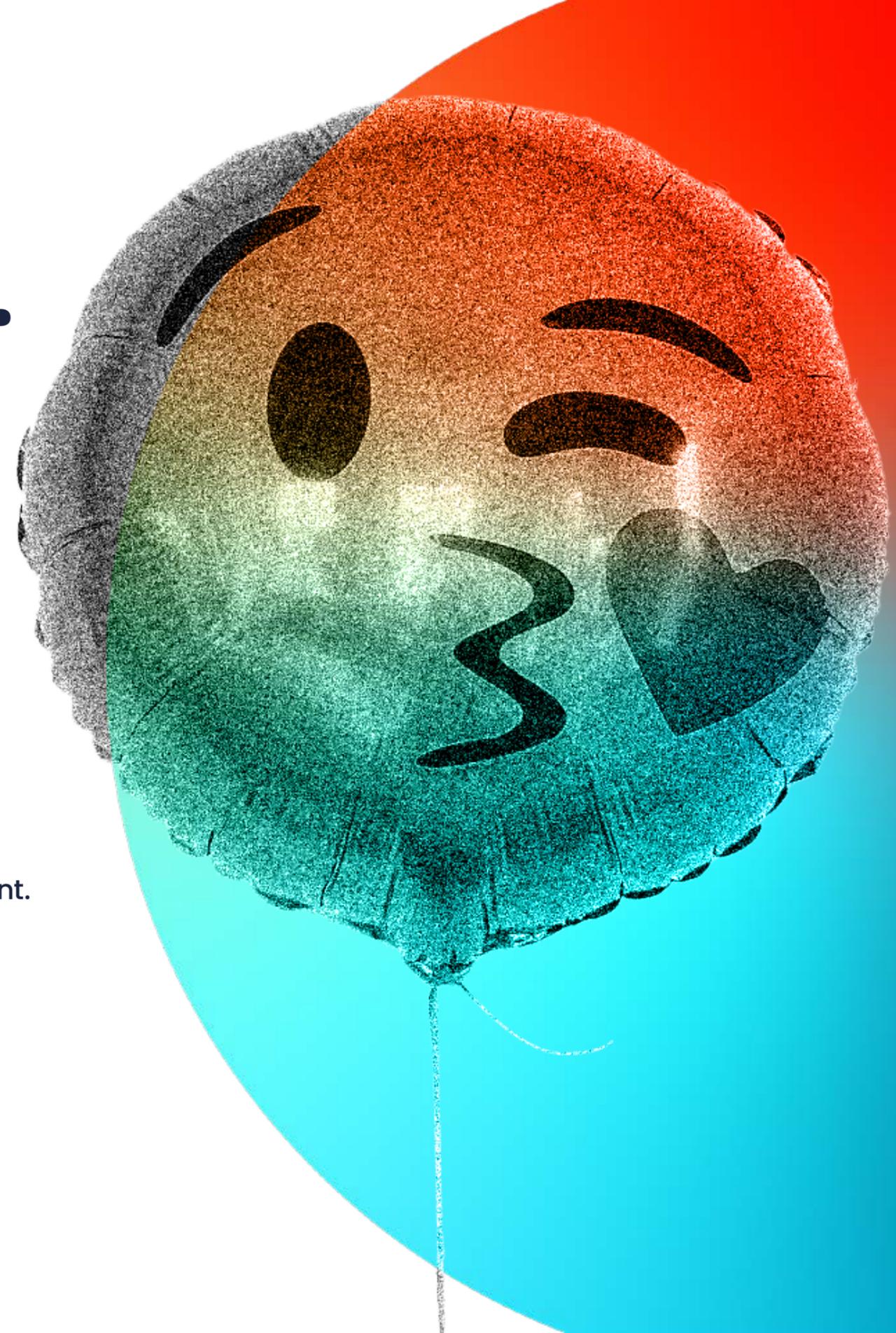
It's also worth noting that you and your team may be too entrenched in the business to see things clearly from your audience's perspective. The creative team is trained in what the Japanese call "Shoshin"—or beginner's mind—the ability to step back and see the world through the eyes of a newbie (i.e. your audience).

Creatives are highly emotive and empathetic people who spend a lot of quality time trying to feel their way into the audiences' world. They can't do your job and you can't do theirs. It takes both of you to do good creative work that works.

8 signs the relationship is working.

When a client/agency relationship works, it's a beautiful thing. Here are eight signs it's working: As mutual understanding blossoms, the work gets better and can be done more quickly.

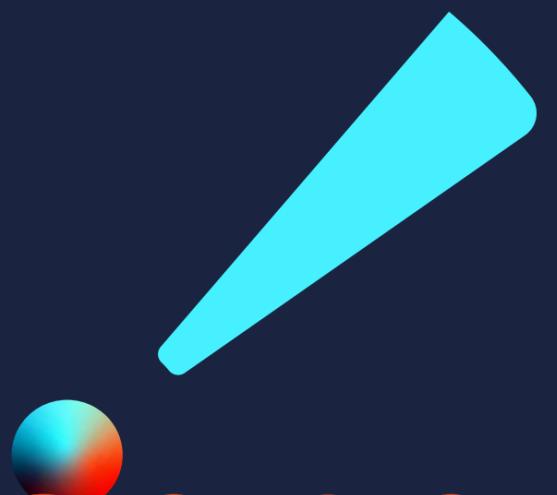
1. You're having fun.
2. There's mutual trust and respect. It feels like a partnership, not a vendor relationship.
3. The work is gradually getting better.
4. There are few fire drills, deadlines are being met and communication is frequent.
5. The agency feels comfortable asking you lots of questions.
6. You know what you're spending when you're spending it.
7. There's healthy debate.
8. Everyone is accountable for their mistakes.





5 signs you might need a new agency.

- 1. They're the wrong experts:** Agencies are notorious for taking on work they aren't entirely proficient at. In this case, you'll be paying for them to learn. Look for agencies that will be forthright about what they're good at and what they are not good at.
- 2. You've outgrown them:** Your business needs have grown and your agency can't keep up.
- 3. Lack of strategy:** You have given your agency the budget, time and freedom to bring better, more strategic ideas and they continually return with something expected.
- 4. Consistently clueless:** Whether it's frequent turnover, poor onboarding, or sheer overwork, your agency team cannot seem to retain knowledge about your business. You complain and there are no improvements.
- 5. Lack of trust:** They consistently miss deadlines without forewarning, fail to set expectations, don't follow their own process and don't take accountability. It's time to have the talk.



**“Creativity is an agency’s
most valuable asset,
because it is the rarest.”**

—JEFF RICHARDS, Chair of the Department of Advertising + Public
Relations at Michigan State University

ABOUT THE AUTHOR

S. Todd Anthony

Todd Anthony has managed hundreds of agency+client relationships from multiple sides. An award-winning copywriter, creative director and the founder of the creative agency Pinwheel, he has 25+ years experience working with dozens of brand powerhouses including Coca-Cola, Gillette, Lego, Twitter, and Amazon.

Todd has agency stays at Ogilvy, Young & Rubicam, JWT, and McCann Erickson as well as creative leadership stints at global media companies CBS and Yahoo.

In 2014, Todd founded Pinwheel, a brand storytelling and content agency focused on health, wellness and fitness. We help brands develop deeply loyal followings so they can grow and flourish.

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Talk to us!

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That's all Folks! 

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