

*why principals/owners need to be*

# BIG-PICTURE THINKERS

SPRING 2017

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*trendwatch*

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## REFRESH, RENEW, RECOMMIT

Spring is a time of renewal, which may account in part for why we feel more light-hearted and energetic. That extra spring can boost our efforts for tackling internal processes, pushing harder on new business, and developing new services that deepen client relationships.

In this issue, we delve into how to cope with uncontrolled growth in your agency, including the purpose of an agency business plan, and the leader's role in managing growth. We review the proofreading process—why a formal proofreading process is essential, setting up your process, and how embedding that process in the agency's daily workflow affects culture and mindset.

Our fancies lightly turn to thoughts on new business, specifically how prospecting is like pitching to a cat, and why finding the right catnip can intrigue prospects into taking your call. We examine why employees may not fully adopt agency management or workflow systems... and why being fluid and flexible about system compliance is perfectly OK.

We offer thoughts on why agency principals should be their firms' big-picture thinkers, and how helping your clients strengthen their customer retention programs can bond clients to your ad agency.

Finally, we share highlights from our recent SAIL 2017 owners/managers conference held at the Walt Disney World Resort® in Florida.

We hope this thinking puts some extra Spring in your agency's step.

Laurie Mikes, COO



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*why principals/owners need to be*

# BIG-PICTURE THINKERS

*by Deborah Budd*



**F**or many agency owners, the advertising business was the most fun when they were smaller—just a few people kicking ideas around and doing great work for good clients. But unless you choose the stay-small route, the time comes when you have to allow the agency to grow. And as you grow, you must begin to cede the daily fun stuff and move into the role of leader.

This does not mean you cannot still be a creative thinker. It may mean, however, that your creativity is now focused on how to grow your business as much as your clients'. You must be the big-picture thinker for your ad agency.



### **Helicopter View**

To foster agency growth, the principals of smaller ad agencies must learn to step back from hands-on activities of the daily agency grind, and assume manager/leader duties. This means becoming the helicopter pilot, the person who hovers above the action and has a whole-agency picture of the entire operation. In practice, standing back often includes delegating authority for daily ops to trusted managers; selectively performing important functions like executive-level attention to key accounts and leading new business pitches; and meeting regularly with managers and the new business developer to keep a finger on the pulse of agency finances, development and management issues.

But the principal also has a role in agency culture that overlaps into human resources—that is management by moving around, or as Walt Disney called it, [pollination](#). Agency owners need to have what amounts to a third-party view of daily agency functions, but still be “in” the business to maintain awareness of issues, morale and attitude. You are the enablers of “smooth runnin’,” the people who set the tone for the whole shebang.

### **Futurist**

Extend that to being your [agency’s futurist](#)—someone who keeps an eye on trends and changes, so the agency can jump on them when opportunity presents itself; or who can begin investing in talent in categories that will soon be in demand. Keep an eye on new technologies (virtual and augmented reality, facial recognition, 3D modeling, etc.) and how these might be used to engage client customers. Watch for category disruptions

that might open doors for new business pursuit, and strive to be a disruptor in your own niches. That said, disruption is not your only job; at times, it will be your role to rein in disruptive impulses if these do not align with brand perceptions or consumers preferences.

### **The First 20% Thinker**

Agency owners play another role: they must lead as innovation thinkers, putting ideas on the table and encouraging managers and employees to run with them. At ZOOMGroup San Antonio 2016, an attendee called this “being the person who comes up with the first 20 percent of an idea.” In this scenario, you serve up higher-level thoughts, then let employees play with and develop them. Suggest new trends and tech to investigate, assign people to do the research and report at the next [creative pipeline meeting](#). Or, propose an idea you think might work for a particular client, and invite the team to explore it further. Principals should move on to the next 20 percent idea, or other duties that demand their attention. But your first 20 percent ideas should flow regularly to keep boosting ideation and innovation among the troops. As principals near retirement and begin phasing more control into the hands of agency successors, your next-tier managers may become the first 20 percent thinkers.

Think of this ideation process as Creative R&D—start your own research and development culture, where employees can bring ideas to the table, too. But be the person who sets the stage for R&D thinking. Jot down some initial ideas to start on, then keep a notebook to which you can add over

time, so you have a steady supply of ideas to play with and hand off when you’ve done about 20 percent of the work. Dedicate regular, weekly time to simply thinking.

Becoming the big-picture person at your agency is as much a matter of self-discipline as an innate talent. Your agency will be the better for your use of the little grey cells. ●

### *Additional reading...*

[Ten Things Every Employee Deserves](#)

[Do You Need a Helicopter Pilot?](#)

[Traffic Rules!  
\(You Got That, Dude?\)](#)



# ANOTHER MISTAKE?

*fix the process*

*by Beth James*

It's another crazy day in the agency. You have three big rush jobs in progress, and numerous small jobs jostling for attention. Phones are jingling incessantly. Your copywriter, creative director and artists are all scrambling to get everything done. And then, a demanding client sends back a text-heavy annual report loaded with changes, marked up in a color akin to invisible ink. The AE is out of the office and unable to field questions regarding the markup. The proofreader has looked at the markup twice and is now squinting. Yes, just another day in the agency.

Unfortunately, unless you have a very strong preventive proofreading process in place, days like this are accidents waiting to happen. Like a full cup of grape juice hovering over a white pile carpet, it only takes a moment's distraction to create a big mess. Divided attention, multitasking, interruptions, pressure, rush jobs, and multiple proofs read by the same individual all provide fertile breeding ground for errors to creep into your agency's work.

### ***First, a reality check***

We all make mistakes, and we all forget to look over work in detail from time to time—especially under deadline/time pressure. Another issue is that we see what we expect to see, missing obvious errors because our eyes “fill in the blanks.” Of course, there is a continuum in terms of how individuals see and perceive text and detail. To a degree, this is a job skill that develops as people work in the field.

But some people are more prone to making or missing what I'll call “small detail” errors. This is not a disaster as long as everyone, including that individual, is aware. The first step to preventing errors is to take ego out of the equation: people need to recognize, and take extra care over their own stumbling blocks. When each individual recognizes his/her skill level, it's easier to improve performance and avoid issues.

One of the nicest, most hard-working individuals I ever had the pleasure of working with was error-prone. She was young, new to the job and industry, and painfully aware of this fact. She also worked very hard to overcome it. As her supervisor, I was aware, and made sure her

## Our Brains Read for Meaning, Not Spelling

We've likely all seen that Facebook meme featuring an entire paragraph of misspelled words, that somehow most of us can read just fine after giving our brains a moment to adjust. The trick is that if the shape of the word plus the first and last letters are familiar, our brains can make sense of it even though the spelling is a typographic hash. That is because our brains are hard-wired to read for meaning, not parse individual characters. It is also why using multiple proofreaders, team proofing, and tactics like reading line by line with a ruler or reading something upside down can be so valuable. These tactics force us to slow down and trick our brains into paying attention to the details, not just the sense of what we're reading.

Proofreaders everywhere, much respect....

work was carefully proofread. Over time, her work improved dramatically and she was able to train others in her job... and in how to prevent errors

### *First, adopt an “error-free agency” mindset*

Making sure your agency's work is error-free is as much a product of your agency's attitude as procedure. Make proofreading integral in creating work, rather than an add-on job (your neglected stepchild) to be dealt with before the work is rushed out the door. As proofreading becomes a set part of your agency's processes, people are much less likely to ignore it or brush it aside. It also becomes a point of pride, a part of your agency values, to deliver error-free work every time.

The error-free-work mindset boils down to one sentence: “nothing leaves my desk until I've checked the entire job—especially all the items that I worked on.” Obviously, the digital artist will not be expected to read or review an entire annual report. But the artist should take the time (ideally, time built into the job estimate) to assure that 1) any text changes are made neatly, without changing the flow of text or omitting/dropping other lines of text; and 2) that any design changes are made exactly to the client's specifications.

In addition to production artists, AEs should spot-check all client contact information (phone numbers, addresses, contact names, and so on), as well as back-checking proofs to make sure all client changes/revisions have been incorporated. Your proofreader needs to review all proofs in sequence, too, as well as checking spelling in headlines and watching for deleted or dropped text, etc. Other proofreaders should have access to the same set of dated, sequential proofs. Add

READ THE TEXT OUT LOUD WHEN  
PROOFREADING. LISTEN TO  
THE FLOW AND LOOK FOR  
GRAMMAR MISTAKES. READ OUT  
LOUD IN YOUR HEAD IF YOU  
ARE IN A SETTING WHERE YOU  
ARE UNABLE TO VOCALIZE.

*Jim Garrison  
Allegra, St. Louis, MO*

fresh eyes at the final proof stage. Ask the client to have internal experts cross-check all specs and product information.

### *Setting Up a Process*

Moving from the people to the process, there are a number of best practices that can dramatically reduce the chances of making (and overlooking) errors. Remember, no proofreader should work alone. Even the most experienced, eagle-eyed grammar guru will miss things.

*Have a clear proofreading path.* As your agency grows, make sure you have a clear proofreading process in place. This may vary from client to client, and job to job, so set a path at the beginning when the job enters the agency, determining who should be involved. As the job progresses, make sure to post all iterations in your project file and notify the necessary people when it's their turn to proof.



Use a proofreading checklist. [Download a sample](#) from our forms library. Customize the list to your agency's (and clients') needs

*Proofreading should be "one step removed."* No one should have to proof their own work, especially just after completion. Copywriters should be part of the proofing process, and may even coordinate the process, but should not be responsible for multiple proofs of their own work. Familiarity can lead to blind spots—some mistakes slip by repeatedly because the reader sees what ought to be there. Include others (Creative Director, the Production/Workflow Coordinator, the Account Executive, etc.) in the process—fresh eyes tend to be sharper. Try team proofing on more detailed projects, where one person reads the content aloud and the second cross-checks revisions.

*More eyes = fewer errors.* We all catch different things. Some people specialize in typos and omissions. Others are grammarians. Still others catch strange alignment issues in headlines and paragraphs. Still others see inconsistencies in applying colors to headlines, point size/type style variations, and inconsistent margins. Five sets of eyes are optimal.

*Designate backup proofreaders.* Different projects may require different levels of work, but all require the same attention to detail. You may have people who reliably catch small errors that others miss. Ask them to proof smaller jobs that need to be done quickly, like marketing emails or small brochures, and back up your primary proofreader on large projects.

## Do You Need a Proofreader?

In a word, yes. Most agencies need a proofreader... at least a few times each day. It all depends upon your agency's volume of work. Since a proofreader does not necessarily fall under the "profit center" designation, how do you justify hiring one? One thing is for certain: you don't want to wait until you lose a client because a key copy point was left out of an ad.

### *Who (and what) should you look for?*

Depending upon your agency's needs, you may wish to begin by advertising for a part-timer or *freelancer*; or contact an employment firm to hire an individual on a temp-to-permanent basis.

If your agency does a lot of text work, or high-level technical/medical/scientific documentation, consider someone with matching *tech writing or editorial experience*. Depending upon volume, a freelancer with industry skills can be a lifesaver. Leverage the funds spent on this higher-level freelancer by having them mentor someone in your agency who has an aptitude for or interest in similar work (an entry-level copywriter or account coordinator with great writing skills).

Moving beyond the "tech pro" level, there are many accomplished *freelance editors* available. Check LinkedIn for editors' groups. Ask for a few sample markups and provide them with a job or two to test them out.

You may also find a "*pre-tiree*"—an experienced person from the ever-churning journalism world, or a skilled professional writer looking for a part-time role.

Yet another option, as you grow, is to hire someone to *fill two or three unrelated agency functions* (i.e., content development and part-time proofreading). Who knows? You may even find a precise-minded person who can do some accounts receivable work and proofreading!

*A caveat:* Beware of individuals who exist only in the blogosphere or on Twitter with a few dozen followers. Be especially careful to weed out those who learned grammar and punctuation online. Do this and "your on you're own their, yo."



IT MAY SEEM LIKE AN  
ADDITIONAL COST, BUT IN  
REALITY, HAVING A DEDICATED  
PROOFREADER ALLOWS MORE  
BILLABLE TIME FOR YOUR  
OTHER STAFF MEMBERS.

Colleen Greene  
Greene Marketing, Bath, PA

*Everyone signs off!* That includes the designated client proofreaders. Date and initial all sign-offs, or attach digital sign-off sheets to pdf proofs. Archive all proofs.

### **A Multi-Stage Process**

*Proof Text Prior to Layout:* Is the project text heavy? First, proof any text before beginning to flow it into layout form. It is much easier to correct errors and rewrite awkward phrases before copy is flowed into a layout. This saves precious design time reformatting work because of errors. The proofreader and ideally two other people (art director or creative director) need to review the text proof. The client should also OK the draft text.

Even if the text is sparse, proof it... *then set it aside (preferably overnight)*. If an ad or piece of digital art contains minimal text, designated people and the assigned proofreader should read it at least twice: one time before going to the client for

approval, and again after any client changes are made. At the final stage, try to set it aside overnight and have everyone look at it one more time the next morning. It is amazing what you may find after a pause.

*Interim Layout Proof:* After the layout is complete and prepped for client review, read and examine the entire piece again. Check verbiage against the initial proof, and, in addition to errors, focus on aesthetics, or what I call (for lack of a better term) general readability. Look for dropped lines of text, strange or unnecessary hyphens, widows and orphans, and other jarring elements. The proofreader, and three or four backup proofers, should review at this stage. Use your proofing checklist!

*Post-Changes Proof:* This is a judgement call, depending upon whether changes are extensive or minor. The biggest issue here is to prevent client changes from causing a cascade of unintended issues (text reflows, odd rags, dropped copy, etc.). Again, back up the proofreader with other individuals. Make sure a client-side “expert” signs off after the agency reviews and signs off on all changes.

*Final Review – Everyone Included!* Then give the entire job a thorough going over before submitting to publication or sending it to a vendor for final production. Refer to sequential proofs and record any final changes. If the job is going to print production, the pre-press proof is one last chance to catch errors. Again, have at least two people check and initial the press proof.

### **Sort out underlying personal issues**

Unfortunately, even with a formalized proofing process, there are people who habitually make

errors and then make it a practice to avoid taking responsibility. At first, you may consider this to be a by-product of rush jobs or slapdash work on an “off” day. But when it goes beyond that.... We’ve all had co-workers who are difficult on many levels, not just in terms of errors and omissions. There are a number of ways to determine whether you are dealing with an error-prone individual or someone who just doesn’t care (or has other issues). Do they defend their errors? Do they become angry and deny or place blame elsewhere—throwing the error back at the client, or manager, or blaming their software program? Do they become defensive or vindictive after someone points out their error(s)? We all have bad days; but when those bad days occur frequently, you may have an employee problem, not an error problem. Offending employees should be put on corrective, performance-based probation and monitored until improvement is achieved—or fired if they fail to improve. As in all HR matters, document the process in the employee’s personnel files.

A formal proofreading process can seem tedious when you are accustomed to doing everything on the fly. But as your agency grows, process can save your bacon. Make a proofreading process an essential ingredient in your workflow system. Sweating the details will reduce errors and improve profitability... and that is a correction that needs no debate.

Many thanks to all of the Second Wind members who participated in our recent [Forums discussion about proofreading](#). So often, the final proofreading can feel like overkill, and yet (and I can just hear our late founder, Tony Mikes, saying this), “Proofreading never seems to be a big deal... until something goes really wrong...” ●



# Come fly with me

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## WHY AMS SYSTEMS SHOULD ADAPT TO USERS

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*By Deborah Budd*

**W**e often hear from ad agency managers regarding the difficulty of getting people to fully adopt and use agency management or workflow systems. Managers want people to toe the line and become super-users of the system, because that makes managers' jobs easier. But many individual users tend to selectively use agency workflow systems, cherry-picking the sections that help them in their own jobs, and ignoring all the rest.

### ***System, Meet System Resistance***

Each agency culture includes many personalities with varied learning and work styles; and many of our people are determinedly individualistic—or just plain stubborn about being asked to fall into line and conform. Creative people tend to be rule breakers—that is why they work in the agency business, rather than making much better money in financial services or a law firm.

Systems are great tools, but managers need to remember that the primary function of an ad agency is to help clients sell stuff. As long as people are fulfilling that function to clients' intense satisfaction, managers may want to rein in their frustration and reconsider their internal systems... and how those systems are used. Here is some food for thought...

### ***Watch Geese Flying in Formation***

In storybooks, geese always fly in a tight V-formation. But watch actual geese flying across the sky some autumn afternoon. They don't fly in tight formations. The leader changes; those following break off and move to new positions; others break off into smaller groups. Sometimes there is a long, raggedy row on one side of the V, and a short, stable row on the other. There are constant changes in which geese are in which angle of the V, and always a few stragglers hurrying along behind the main flock.

The thing is, their alignment is fluid, constantly adapting to changes in airspeed, wind speed, wind direction, updrafts and downdrafts. It's not about perfection, but about collectively getting to their destination, stragglers and all. Obviously, a perfect formation would achieve that goal more

efficiently; but there are many variables affecting the flight, so perfection is not a priority—it's about being responsive in the moment, and still keeping the goal in view.

### ***Keeping It Fluid***

An ad agency's workflow must also function fluidly. People shouldn't have to be in lockstep, but able to step out of formation to answer the needs of the moment, and slip back into alignment as that need is fulfilled.

The same idea applies to culture, hiring and management. In fact, the idea of alignment with flexibility is applicable across all agency functions. Your system outlines the steps, but should not dictate exact compliance. People should be free to eliminate unnecessary steps.

Agency managers need to monitor their AMS to ensure that the most important steps—time sheets, POs, estimates, approvals, CCRs, etc.—are being entered into the system. But they also need to understand that the fluid nature of agency workflow will always encourage people to work around those parts of the system that are more burdensome than helpful. As long as you are getting to your goal of delivering quality creative product that helps the client achieve their goals, you are doing well. The system should be adaptable to the people who use it.

We love to hear how agencies are shaping their internal systems to improve efficiency and be more agile. Share your stories with us at [editor@secondwindonline.com](mailto:editor@secondwindonline.com). Thanks, and keep on flying. ●



# Prospecting Can Be Like Pitching to Cats

Most people love dogs. Dogs wag their tails and greet you like a long lost friend, are cool with kicking back or going out for some fun, and tend to hang on your every word... unlike, for instance, new business prospects.

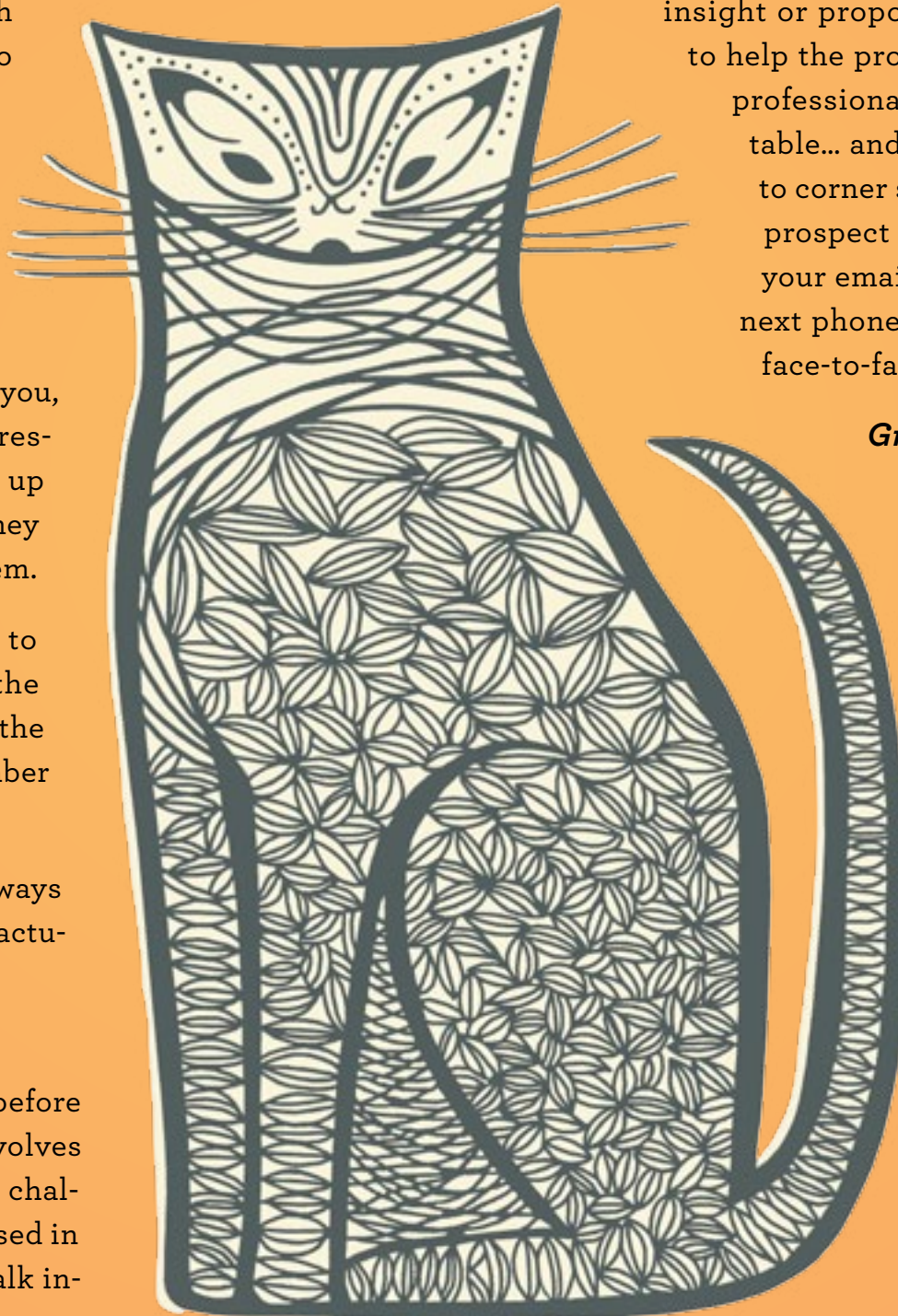
New business prospects are more like cats. Don't get me wrong. I am a cat person. But cats are definitely not hang-on-your-every-word types. Cats often seem barely to acknowledge that you are in the room. If they do deign to notice you, they stare at you with that blank-but-intense expression, then suddenly start taking a bath. Or they get up and walk away while you are talking to them. Or, they give you the skeptical eye for daring to address them.

I sometimes think cats are thinking, "You talkin' to me? Why should I listen, exactly?" ...not unlike the typical new business prospect. The skeptical eye, the inattention, the blank stare—yep, I've pitched a number of cat people.

That is why you need to connect with prospects in ways that engage their attention and interest before you actually have a face-to-face meeting.

## ***Cold Calls, Letters and Emails (oh my)***

We write often about the need to do your research before you try to contact a new business prospect. This involves understanding the prospect's competitors, market challenges and pain points. You should also be well versed in the prospect's products and services, and able to talk intelligently about their industry.



Beyond this background research, you need to develop an insight or propose an idea—catnip, as it were—that serves to help the prospect see your agency as smart marketing professionals with something of interest to put on the table... and not just another bunch of ad people trying to corner some of their budget. If you can intrigue the prospect into listening to your voicemail or reading your email or letter, they are more likely to take your next phone call... and that is the first step to getting a face-to-face meeting.

## ***Grow Your Own Catnip***

At your next new business pipeline meeting, strategize some insights and ideas to use as engagement tools with targeted prospects. If the first one doesn't work, try another. Keep up the drip, drip, drip of contact. The most persistent person often wins the business. Develop or share content that supports your idea or proposal.

Instead of fixing you with the skeptical cat's eye, prospects will be more likely to welcome you with tails wagging. Be ready to expand on the idea, and make sure the rest of the agency team is prepped to move in and close the deal.

You'll have your prospects purring. ●



# CREATE STICKY BOMBS

*for memorable messages*



One of the toughest jobs of any ad agency or marketing firm is creating a message so memorable, it “sticks” in the memories of the people we most want to reach. If we do our jobs really well, the message will be sticky enough to spread beyond our target group and become embedded in pop culture. Just do it. Think different. Taste the Rainbow. Got Milk?

Too often, marketers today are under the gun to deliver stickiness. Time constraints are so tight, creatives grab for shortcuts to get the job done. One of those shortcuts is the use of advertising stereotypes.

Consider posting this motto in your conference room or brainstorming zone:

***Reinforcing negative perceptions and stereotypes is bad; subverting or challenging stereotypes is good.***

Bob Killian of [Killian Branding](#) emailed a post about an *International Journal of Advertising* piece on the use of stereotypes in advertising, and the many justifications for using stereotypes instead of overturning them...

“...including beliefs that stereotypes are based in truth, are attractive to audiences, communicate quickly, simplify processing, prevent distraction, *prevent thinking, and are the obvious solution.*” (The italics are mine – this is why so many people despise advertising.)

Bob summarizes: “The major excuse given for stereotypes was quick communications for instant simple understanding. We’ve only got 30 seconds, they cry. If we put dad in an apron baking in the

kitchen, people will be distracted, wondering if he’s out of work. But Mom in an apron lets us talk about cake mix benefits sooner.”

Only one advertising practitioner cited in the story argued for smashing stereotypes as a way to be more memorable, more “sticky.”

Bob called him a “bomb-throwing creative disruptor.”

I’m reminded of the scene in “Saving Private Ryan,” where soldiers short on arms and ammunition have to dig in at a key bridge and try to hold the line against advancing German forces. Captain Miller (Tom Hanks) explains that the Army Field Manual has instructions for manufacturing “sticky bombs” for blowing the tracks off tanks. You make a sticky bomb by taking “a standard GI sock and packing as much composition B [or TNT] as possible into it. You wire up a simple fuse, then soak the whole thing in axle grease so it should stick.”

Our job is to load Comp B into our ideas, make them as sticky (memorable) as we can, and blow consumer preconceptions off the tracks.

Disruption is only part of the game—if we aren’t sticky, we aren’t changing the minds of our audiences or inciting them to act.

Get out there and explode some stereotypes. ●



# Sail

## HIGHLIGHTS

*By Jennifer Mikes*

This past March we held our annual owners/principals meeting at the Walt Disney World Resort® in Florida. This year's meeting marked the second year of the [Small Agency Idea Lab](#), or SAIL. Here at Second Wind we look forward to this meeting every year, building an agenda that will help attendees move their agencies in new and different directions. It's not unusual for our SAIL attendees to return to their agencies armed with an arsenal of good, usable ideas. I'd like to share some of the highlights and insights from this year's meeting.

Brian Olson of [InQuest Marketing](#) kicked off the event, discussing his agency's tremendous growth, and how they compete in today's fast-paced market. Brian shared his insights, along with four main tenets that allowed his agency to move from \$2 to \$20 million in each year:

- Stay true to what works
- Stay one step ahead
- Take a strong approach to agency finances and management
- and you just be you

Brian also stressed that change in the industry is inevitable—and some of their success stems from being nimble enough to adapt to those changes.

Next, [Sharon Toerek](#) of Toerek Law covered how agencies can turn their intellectual property into additional revenue streams. Sharon correctly believes that agencies are actually in the business of creating intellectual property. Even though much of that property eventually makes its way into client hands, the agency creates its own assets at the same time. Sharon featured a series of examples where agencies capitalized on original processes or systems, from staff training to workflow management to proprietary processes like research and discovery methods. She even showed us how unused or unexecuted assets have led to the creation of licensable products like fonts. She urged all participants to take inventory of their IP assets and to protect and capitalize on them.



I had the pleasure of meeting our next speaker, John Wulfert, at a Second Wind Zoom Group meeting last summer. John's agency, [Motiv8](#), is a very digitally-minded, data-driven shop with roots as a direct-response agency. During the Zoom meeting John mentioned that he believed we were beginning to see online data merging with rich offline data, enabling more targeted and relevant ads. We asked him to speak at SAIL regarding the collision of these worlds. John presented a case study on their omni-channel campaign for Peapod®, an online grocery store delivery chain. Email, direct mail and targeted IP banner ads were served up in various combinations, with different messaging to specific types of households. In the end John and his team delivered great results for the client—proved that digital advertising doesn't have to be just a shot in the dark.

Our good friend Ross Toohey of [2e Creative](#) closed the day. Ross shared the details of Teamshares, his innovative plan for motivating the modern agency. A returning presenter, Ross usually brings a fresh approach to an old problem... and this year was no exception. Under Ross' leadership, 2e Creative has grown by leaps and bounds. Always looking for unique problem-solving methods, Ross wanted a better incentive for his team than traditional (uninspiring) profit sharing. Working with his CFO, Ross came up with what they refer to as Teamshares. The program includes a bonus pool directly controlled by the team via their performance; there is a scoreboard and everyone can affect the number. "Share" price is determined by factors such as growth, productivity and quality. The program, in addition to providing the agency with a new bonus structure, has also worked to promote teamwork and a greater level of engagement in the business. A win-win for all involved.

Refreshed and renewed after an evening of chatting and networking at our cocktail party, we dove right in to day two with ABC Creative Group from Syracuse, NY. ABC Creative is now integrating facial recognition technology into ad testing and development. Partnering with research and analytics firm Dumbstruck, they showed testing for different versions of a commercial using their proprietary measurement tool. Would the audience respond to the male customer or the female customer more favorably? Are viewers' overall impressions of the brand positive or negative? Do parts of the commercial make viewers happy or sad? This technology is clearly effective in gauging audience response as you create and test ads. For more information, check out [Dumbstruck](#) and how [ABC Creative](#) is continuing to use this technology for their clients.

The daily grind of running an agency allows little time for self-reflection. We thought SAIL would be an opportune time for attendees to take some time out to assess key areas of their performance. We also asked attendees to identify goals for 2017, as well as top business opportunities and threats to achieving those opportunities. Once the assessments were complete, [Vince Dong](#) of Ad•vice led the group in a great discussion of the results. As always, increasing new business remained a top goal, as well as succession planning and managing growth.

One of the more personal sessions was a one-on-one with agency owner Dana Pulis of [Kinetic Agency](#). A few years ago, Dana lost over 50% of her AGI literally overnight... every agency owner's worst nightmare. When Dana recovered from the initial shock, she made the courageous decision to begin

rebuilding the agency one client at a time. Dana's story provided attendees with a first-hand survival story. She described personal and professional financial decisions, as well as painful staffing decisions. In a business of uncertainty, where nothing is guaranteed, Dana managed to triumph over tragedy. We greatly appreciate her time and her willingness to be so open about her experience.

Finally, we were pleased to have Rick Carlson, CEO/Founder of [SharpSpring](#), who discussed their platform and the need for agencies to create two-way, hyper-personalized communications. Rick demonstrated the shift in the buyer's journey, from a seller-controlled process to a buyer-powered process. By 2020, buyers will manage 85% of their own purchase journey without talking to a human. Rick believes the future of marketing lies in the ability to bring "previous era human conversations" to "new era digital marketing." Tools like SharpSpring can help agencies build personalized digital content for their clients and their customers. In a world where generic digital ads and content no longer attract consumer interest, agencies need to avail themselves of such tools.

At Second Wind, we enjoy bringing events like SAIL to the small to mid-sized agency community. We certainly had two days of exciting presentations and networking. In fact, we frequently hear from our attendees that, in addition to seminar content, they always look forward to learning from each other—the exact premise that Second Wind was founded on almost 30 years ago! We'd like to thank all of our presenters and attendees for helping to make SAIL 2017 such a success. We are already prepping for SAIL 2018 so be on the lookout for dates and details soon. ●



**W**e should all have such a problem, right? Yet it is not unusual for Second Wind to hear from ad agencies struggling to manage the demands of a booming business environment. That's the agency business: feast or famine.

How do you keep from spinning into chaos when you suddenly have more business than it seems you can handle? When you are dealing with too much business and not enough people, or sudden increases in staff blowing your overhead through the roof, or trying to balance new investment against profits, the daily demands can be overwhelming. After 29 years of watching and working with agencies across the continent, we've learned the trick to handling the feast times: *work your business plan.*

***How does working the plan help with the chaos of uncontrolled growth?***

If you have a business plan—and every agency needs one—you already have certain goals and objectives, a budget, and an idea of the people and equipment you need to execute that plan. This means when new opportunities arise, like a big new account, or a flurry of smaller accounts that demand changes to your people and daily operations, you can check those opportunities against your established plan.

Two things occur when you reference your plan: you either decide the opportunity is not a good fit to help you reach your goals; or, you decide to alter your goals to accommodate the new opportunity. Either way, you are basing the decision on planned growth, rather than just grabbing every brass ring that comes your way and figuring out what adjustments are needed after the fact.

“We can’t afford to pass up any opportunities!” you cry. “If we let one slip away, we may never get another shot.” That’s a dangerous attitude if you hope to stay in business for the long-term. Instead of this sort of reactive thinking, agencies need to adopt proactive thinking, especially with regard to new business and account growth. Proactive planning requires that every aspect of growth be the result of careful consideration. Not every new account is the right account for your agency; not every strategic opportunity is truly valuable to the agency’s long-term stability and profitability.

### ***Proactive planning helps prevent chaos.***

When you get a new opportunity, weigh it against the following:

- Your stated goals/objectives
- Agency values alignment
- Staffing/equipment needs
- Ability to deliver on client demands
- Profit opportunity
- Cost analysis—can you afford it?
- Risk vs. potential gain

Discuss the opportunity among your partners and/or key managers and decide if the scale tips to or away from taking the account. If you decide the brass ring is worth grabbing, ask what adjustments you will need to make to your plan and budget. Need to hire more people? Start looking as soon as you decide you want the business. (Make sure you actually have the business before you hire!) Need to build specific skills? Find strategic partners to strengthen those knowledge areas. Kick your research and planning activities into high gear so your people can dive deep into the new client's world.

What if the new business is not a good fit for your existing plan... but you'd really like to take it because the money is very good, and you'll accrue other benefits like enhanced reputation and valuable connections? Reassess your plan. If all parties to your planning review agree the opportunity requires a change to the business plan, figure out how that will shift your focus and what adjustments you'll have to make to the plan. Above all, have a plan!

### ***Help! Our middle name is already Chaos!***

What if you skipped past plan assessment and are in the midst of a chaotic growth boom? The only way to rein in chaos is to grab the reins with both hands, pull back hard and hold tight.

*Sit down and make a plan.* The hours you dedicate to getting a handle on where you are and where you hope to end up will pay back to your agency in spades. Enlist your entire staff to assess where your pain points are occurring—personnel/HR issues? Equipment and technology? Office space? Skill gaps? Distracted managers? Pick the most critical areas to focus on first, and assign individual employees to work on trouble areas. Do weekly check-ins to assess progress. As you get a handle on one issue, assign people to work on the next most critical problems.

As your team works together to rein in the chaos of uncontrolled growth, they will feel more empowered to deal with problems that arise. They'll identify smaller issues that can be fixed before they become big issues. The team will depend less on you and your managers, and contain chaos into a manageable daily routine. Best of all, you'll have a plan you can lean on to keep chaos from returning.

### ***Remember, your role as a leader is to LEAD.***

Agency leaders must manage the plan. Get out of the trenches as much as possible and command the operation. If you are part of the chaos, you'll never be able to regain control. [Review financial statements regularly](#) and keep an eye on profits and account relationships. A growth trend can reverse all too quickly if you lose accounts because you are running so fast to get up to speed on new

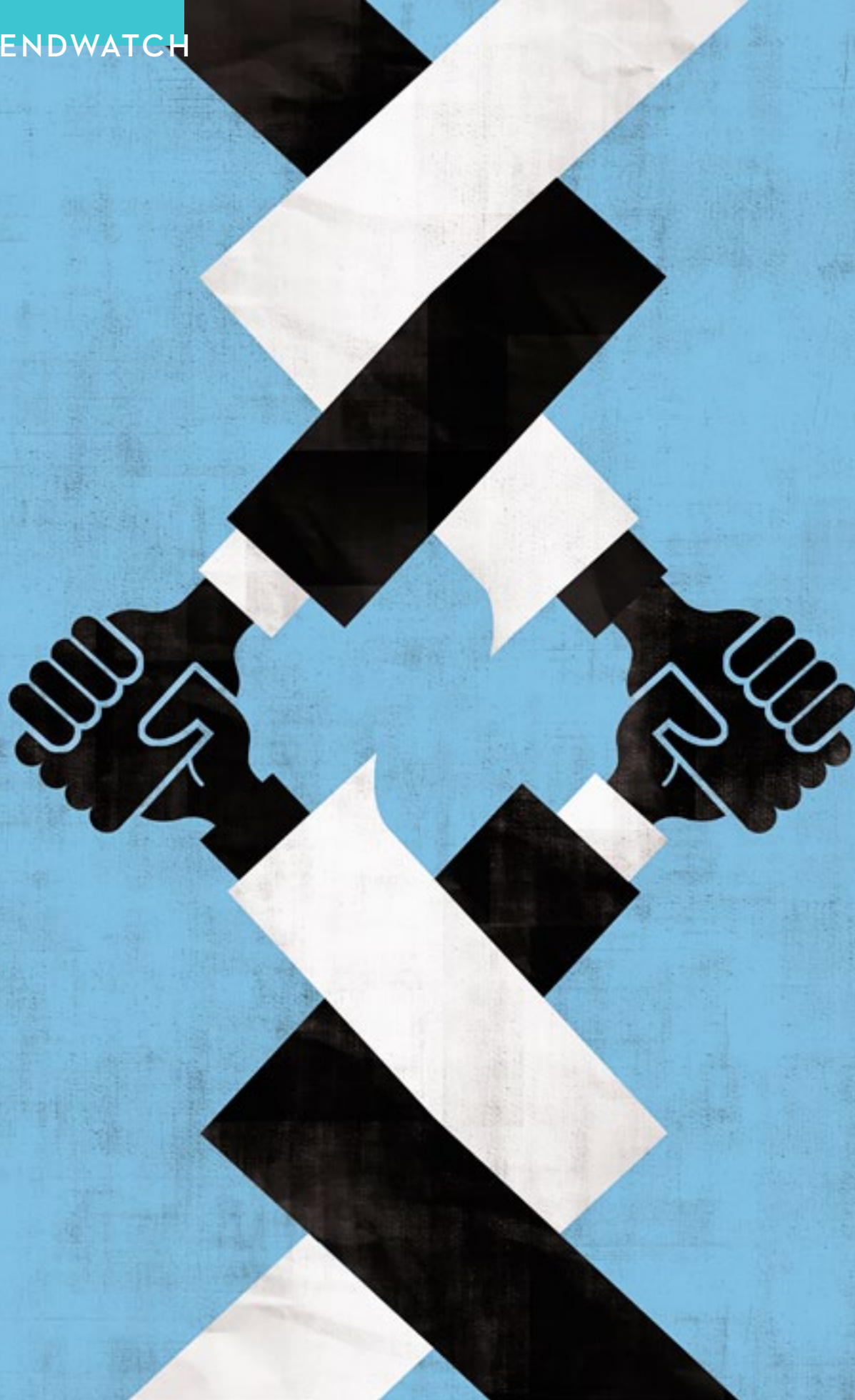
clients. Remember—be a helicopter pilot. Better yet, be air traffic control, and make your managers helicopter pilots. Once the chaos is back to manageable levels, you can step selectively back into those daily roles where the agency owner can and should take part.

Growth is fabulous, but growing to a plan is even better. Not every agency owner is naturally good at planning. But you can learn to plan... and then, [work the plan](#). Then you can watch chaos recede in your rearview mirror, and enjoy the road ahead. ●

See also:

[Ten Signs Your Business Is Growing Too Fast](#)





# FORMING A BOND

## *Customer Retention Programs Bond Agencies and Clients*

*by Deborah Budd*

Most advertising agencies no longer focus strictly on advertising. Instead agencies are strategic marketing consultants, seeking ways to help clients attract, and keep customers. So, helping your clients strengthen their customer retention programs is a great way to bond clients to your ad agency. And customer experience is the key to retention, loyalty and repurchase.

### ***Experience Disruption***

Emarketer reported on a survey revealing how established firms are defending against disruptors—those new, digital competitors who offer similar products but in different and appealing ways; or who have a new twist on a familiar brand. The survey, by Accenture, examined how CMOs regarded new entrants to industries. Thirty-four percent of respondents told Accenture that customers were “becoming more open to engaging in services/offerings from new entrants.”

Of interest to ad agencies and marketing firms is how customer service comes into play when disruption occurs. Thirty percent of survey respondents noted that disruptors were “better at providing a [positive customer experience](#),” and 29 percent said new entrants “use customer experience as their key differentiator.”

Customer retention has long been a priority for businesses for a very simple reason: it’s less costly to keep the customers you have than to attract new ones. Disruptors make keeping customers more difficult. So helping your clients strengthen their retention programs is a great way to bond the client to your agency.

In several 2017 forecasts, I’ve seen “customer experience” or CX listed as a breaking trend. Agencies that can help clients improve customer experience will be highly valued by their clients. So start thinking about CX initiatives you might propose to your current clients; and try to build expertise you can pitch to new business prospects.

### ***Early response is essential***

Customer experience begins with the very first contact, when the customer is a lead, and continues through to post-sale communication and support. A poor pre-sale experience can sour a purchase, assuming there is one; and poor post-sale contact can cause the customer to never return... *and* tell their friends to avoid the company.

Companies also need to understand how small things can resonate with customers during interactions. Customer experience doesn’t need to delight so much as not annoy customers. Small improvements can weigh greatly in customer retention and loyalty.

As consumers ourselves, we agency people know how frustrating it can be send an email to customer support and not hear anything for several days. Companies today tend to cut their live phone support in favor of email communication or bot-style chat support. But studies continue to show that customers prefer phone support over all other methods. Changing that one point of contact can greatly improve customer satisfaction.

Social media is another increasingly valuable channel; 46% of customers expect companies to provide customer service on Facebook, and 88% of customers say they are less likely to buy from a company that fails to answer social media complaints. Guide clients to set up customer service monitoring of social media pages, especially Facebook and Twitter, to speedily address customer complaints.

### ***We feel your pain...***

Speaking of complaints, companies that identify and effectively respond to customer pain points can greatly boost customer experience. Here is an area where agencies may be able to assist clients. Conduct customer surveys to learn where customers have encountered poor experiences, and propose ways to remediate those pain points. For instance, CitiGroup found that many credit card customers called their bank phone number and became frustrated when they had to make a second call to find the right service people. CitiGroup trained bank representatives in how to answer the ten most-asked credit card questions, so they could fulfill those customers’ calls. Office Depot listened to female customer requests for “more fashionable” items, and also streamlined their

supply chain to ensure key products were always in stock, making available more of what customers wanted when they wanted it.

But one thing is key to most customer service improvement: a centralized, full-time customer experience team led by a dedicated senior officer. Companies that try to run budget, part-time customer service operations are more likely to fail customers, and lose them to better staffed and managed competitors.

Take a look at your client list and do some research into their customer satisfaction and customer experience ratings. Then seek to discover where customer experience might be improved or enhanced with incremental changes, and start proposing. Also look for new business opportunities involving customer experience. Your agency may soon be able to claim a niche in customer experience. The value you add to clients’ businesses will help your agency retain your best customers. ●