



A GUIDE TO WORKING WITH AN AGENCY

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FORWARD

After nearly 20 years as an owner of an AAAA* advertising agency representing clients nationally and internationally, my company was purchased by Bates Worldwide, a public advertising agency network listed on the London and New York stock exchanges. Upon the sale, I participated with the Bates USA Board of Directors and became President of one of three international divisions.

This Guide begins with that information, as it is important to understand that my background as both an entrepreneur of a privately-held agency and a network corporate division president has given me exposure to a very hands-on, in-the-trenches approach to marketing and advertising and also, afforded me the opportunity to experience the "Madison Avenue" application of formulated techniques.

With this as a foundation, the purpose is to address the marketing and advertising agency process.

It is written for the small to mid-size entrepreneurial company owner attempting to manage external marketing and advertising resources and correlating ad budget allocation.

Its intent is to assist getting the most out of a relationship with an agency, from the client point-of-view.

*Certification by the American Association of Advertising Agencies (4A's)

INTRODUCTION

Advertising and Marketing are terms some believe synonymous. In reality, they have very specific meanings.

Advertising is campaign-oriented and includes the use of advertising media vehicles to carry a message to an audience. An advertising campaign is generally underpinned with a creative concept; limited to a span of time; and can be solely Brand-building focused or include a call-to-action

Marketing is program-related and represents efforts that require sequential execution. A marketing program is designed to include specific steps in moving a prospect to a customer. In almost every case, marketing is purely call-to-action driven.

For the purpose of using advertising and marketing terms in the context of our agency services, the following definitions apply:

- Institutional Advertising includes exposure to a general audience through a wide-range of conventional media vehicles such as Television, Radio, Billboards, Newspaper, and Magazines
- Direct Marketing is Target profile-specific communications generally initiated for the purpose of generating a one-on-one, or personalized relationship. Media examples include Direct Mail, Telemarketing, Loyalty Programs; and printed collateral.
- Digital Communications is any messaging that incorporates the use of the internet, including website, mobile, social, etc.

Beyond Institutional, Direct and Digital is Public Relations. Although many associate PR with advertising, it is not. Basically, PR exposure is not purchased, but rather, initiated by PR professionals who understand the content demands of specific broadcast and print vehicles and pitch their client's "story" to editorial departments. The editorial managers decide on what story content is applicable to their readership / listening audience and include references to the client or their businesses within their content at no charge.

Certainly, there are varying definitions related to advertising and marketing and each of their subsets. However, based on my experience, and their application to our agency, the above represents the applicable terminology.

ADVERTISING AGENCY STRUCTURE

In the agency business, the operation is broken into departments. Today's traditional full-service agency typically includes Account Service, Strategic Planning, Creative, Production, Media Planning, and Public Relations departments. Within each of the departments reside specialists in Institutional Advertising, Direct Marketing, and Digital Communications.

- Account Service personnel are the liaison between the client and the agency and serve as gatekeepers on the client account.
- Strategic Planners specialize in assessing the client's objectives and develop the basic direction the agency takes in recommending and providing solution-driven options.
- Creative is made-up of teams of copywriters and art directors, under the supervision of a Creative Director.
- Production staff traffic jobs through the agency and oversee the evolution of authorized projects from pre through post execution.
- Media personnel analyze marketing and advertising vehicle opportunities and, based on budget efficiencies, place the clients marketing and advertising schedules.
- Public Relations coordinate press releases and other public relations activities through their contacts with media outlets.

The agency model is one that is inter-dependent and requires a constant and coordinated choreography amongst the departments to effectively produce the intended outcome. With the agency's commitment to develop the very best strategic and creative solutions, time is the enemy and capitalizing on the 11th hour, an inherent practice. The agency business is organized chaos at its finest.

In the agency business, most large shops are run on an hourly billing formula reflecting a one-third / one-third / one third rule, with one- third for salaries / one-third for overhead / and one-third for spec new business, bad debt, and profit – with profit representing a goal of approximately 15% of Gross Income. Accordingly, a \$100,000 staff member is billed-out at \$150 per hour ($\$100,000 \sim 2000 \text{ hours} = \$50 \text{ per hour} \times 3$).

Smaller agencies, with less overhead might operate on a one-half / one-half formula, with one- half for salaries / and one-half for overhead, spec new business, bad debt, and profit. In that case, a \$100,000 employee would be billed at \$100 per hour.

HARVESTING CLIENT INFORMATION

Before an agency can begin to offer recommendations, its personnel should be required to become familiar with the mechanics of the prospective client's organization, and the industry in which it competes.

In our agency, we send the prospective client what we call the mcgregor | graham Informational Guide™. This questionnaire is broken-out to capture information supporting our 4-Step Process™, and includes inquiries as to the company's business model; senior management's perception of their existing Brand; company marketing and advertising efforts expended in the past; and those advertising and marketing vehicles representing future considerations.

Once we have reviewed the responses, we do a tertiary study of the competitors listed and append the guide with our own views on the subjects. Then, we meet with the prospect and share the information.

This process is reflective of the way large agencies solicit new business. Once an agency sets its sights on an account it wants to pursue, the agency researches the company and the industry as a first step in designing a presentation geared to win the business.

As a client you deserve, and should demand, that agency people suggesting a relationship understand your business and the arena in which you compete. Do not entertain any recommendation without being satisfied it's coming from an informed source. In addition, make it clear up-front that the education is on their dime.

Lastly, if asked by an interested agency for access to information, have them sign a Non-Disclosure Agreement. All good agencies sign them as a matter of standard practice. Give yourself the peace-of-mind that proprietary information will be safeguarded.

DEVELOPING THE BRAND

We view Branding as a very simple concept: a Brand is that interpretation of a person, goods, or service – the product - that represents how people and the marketplace feel about the person, goods, or service. It's that simple...how a product is interpreted by the market.

We recommend controlling the Brand, and we do that by defining its characteristics and USP; profiling the Targets; understanding the competition; and developing "Reasons Why" the Brand should be chosen vs. the alternative options available.

Our agency has adopted an approach to Branding by first defining the following characteristics:

- The Attributes: What the Brand is – What are the physical, functional components?
- The Benefits: What the Brand does – What are the results of using the Brand
- The Values: How does the Brand make your customer feel?
- The Personality: If the Brand were a person or a car, who or what would it be (a universal point-of-reference offering the widest range of options for the purpose of defining imagery)
- The Brand Essence: What are the sum of the characteristics? A descriptive, motivating statement?

Once the characteristics have been articulated, we then surface the Unique Selling Proposition (USP). In short, the USP is that aspect of the product that is "Different in a World of Sameness". It is that territory by which the Brand can stake claim that no one else can.

As part of our Branding process, we then do a profile of the Targets. We do this for two reasons: First, we need to understand the demographics, including variables such as age, gender, income, psychographics (lifestyle) and geography, and second: we need to proof our USP as to whether our claim is meaningful to that group.

Next, we do an assessment of the product's top three competitors - again for two reasons: First, we need to be aware of their Strengths, Weaknesses, Opportunities, Threats (SWOT) from a marketing and advertising perspective, and second, we need to "proof" our USP against those competitors, as to the accuracy of our claim.

After an understanding of the Brand's characteristics, USP, Target and competition has been resolved, we then attempt to translate that information into Target-based "Reasons Why" a prospect should choose our client's product over the competition.

If you track with the sequence included, you will be capable of participating with an agency in successfully Branding your product.

DEFINING A STRATEGY

Once the Brand has been thoroughly vetted and the USP translated to “Reasons Why”, it’s turned-over to a Strategic Planner that evaluates the options available in achieving the stated advertising and marketing Objective.

Strategic Planners, and for that matter, all good agency staff, think in terms of an Objective, Strategy, Tactics process (OST).

Every marketing and advertising decision as to execution should be OST-based. Any agency person who suggests a Strategy without exploring the Tactics, or conversely, suggests Tactics without the underlying Strategy, is not doing justice to the assignment.

Good Strategic Planners are experienced in the myriad ways of problem-solving – the operative word being “experienced”, as the ability to surface multiple options in achieving a marketing and advertising Objective is to have been down that road before, or, bring similar experiences to the front that can be used as parallels.

An experienced Strategic Planner will offer a variety of strategic approaches in achieving an Objective, allowing for Tactical considerations including budget, timeline, Brand implications, and other variables to distill the options down to that which is best.

As a client, insist that the agency’s recommendations are grounded by OST’s. Every good idea can be, most bad ideas are not.

DEVELOPING CREATIVE MESSAGING

From a communications perspective, a creative team is tasked with interpreting the Strategy through a Creative Brief, written by the Account Supervisor and based on the Brand work and Strategic Plan.

Creative teams consist of the Creative Director, a senior person responsible for nurturing the project through the process; a Copywriter; and an Art Director.

Creatives are right-brained and often, decision-makers are left. The Creative Director is responsible for being both, so as to encourage the team, but keep the process on-track relative to client preferences.

Art Directors and Copywriters are equal in team empowerment and status. The best teams include partnerships of equal competence. When the scales tip, the work becomes obviously one-sided and too often, a good idea never makes it to great. A good creative team is a beautiful thing to watch. A great team is what agency legends are made of.

As a client, you will be sitting in on creative presentations. Most creatives don't like to present, they like to discuss, fondle, push, and improve their ideas through client interaction. The best creative client meetings I've attended have included clients that understand the purpose of the meeting. They are not there to be kowtowed, but rather, they are there to become engaged, give input, become excited, appreciate and be appreciated.

When attending a creative presentation, pay attention to how well the Brand and USP have been addressed; ask for examples of your competitors work and assess if your work is compelling by comparison. Then, view the work from your Target's point-of-view. If it doesn't knock your sox off, it more than likely won't have impact with your audience.

Lastly, beware of shiny objects. Marketing and advertising creative that "wags the dog", but has no Brand substance is a waste of time and money. As David Ogilvy, one of the godfathers of the agency business mentored, "If it doesn't sell, it isn't creative".

ANALYZING INSTITUTIONAL MEDIA OPTIONS

After you have signed-off on a creative direction, the next step is to decide on what media vehicles are to be employed.

Starting with Institutional Advertising, there are a few issues that are important.

Institutional Advertising is selected by assessing those traditional media (television, radio, billboards, etc) that offer the most cost efficient targeting of your audience profile. This is done by evaluating the number of your Targets contained in the vehicle's total audience. For example, if you have defined your prospect base as male, 25-44 and there is 50% of the media's audience that fits that profile, take the published Cost Per Thousand (CPM) and double it, as the additional 50% are of no value.

Media Buyers use a number of evaluation formulas, including Cost Per Point (CPP), with a point representing 1% of the audience. Although CPP's are important once an assessment of the targeted CPM is completed, it's not something to be overly concerned about as a client. Leave the overall efficiency calculations to the Media Buyer, just focus on whether the media is appropriate, based on CPM's.

In addition, there are two other factors of importance – Reach and Frequency. Agency media buyers utilize a formula based on Gross Rating Points (GRP) and it includes the number of the audience factored by the number of projected exposures. Have the buyer explain the approach used, as they can vary.

In simplistic terms, Reach is the component that represents the number of individuals, or homes, depending on the variable used, that are exposed to the advertising. Again, your concern is the number that fit your Target profile. Frequency is the number of times a prospect needs to be exposed to the ad before an "Impression" is made. Large clients conduct focus group tests that measure comprehension, or "Impression", prior to a media buy being made. As a small to mid-cap business owner, your budget more than likely won't allow for focus group research. Accordingly, you and the agency need to conduct that exercise internally and project a realistic number. As a rule of thumb, a minimum exposure of 3X is advised.

On that note, understand that the success of an advertising campaign is dependent on the proper amount of Frequency. If you are not willing to support the campaign with a budget that will ensure sufficient exposure, don't waste your money, as it will not produce results.

DEVELOPING DIRECT MARKETING

Direct Marketing is much more personalized, as it is grounded in messaging that is specific to the recipient. Whether you're purchasing lists that meet the Target Profile criteria defined through the Branding process such as age, gender, income, psychographics (lifestyle) or geography, or working from an internal prospect / customer-driven database, Direct Marketing strategies include information about the prospect that allows a degree of specificity in the targeting and communication. In addition, when compared to Institutional Advertising, your Target CPM is much more cost efficient, as there is very little waste.

As a client, you should concentrate on two issues:

- First - don't stray from the basic product offering dictated by complicating the message with a lot of irrelevant visuals or copy intended to attract the recipient's attention. Stay focused on the Brand characteristics and USP and demand provocative headline and copy that engage the audience based on your stipulated "Reasons Why".
- Second - stay true to the Creative Mandatories. A good test relative to "proofing" Brand continuity of the Direct Marketing work under consideration is to lay your past work on the conference table and then add the direct marketing suggestions alongside. If the new work doesn't maintain the "look and feel" with that which was created from the Brand Study, send the creative team back to the drawing board. In short, don't bastardize the Brand with junk, based on the idea it is response-oriented. You may get a short-term bounce, but in the long run, it will damage the interpretation and integrity of your product.

MAXIMIZING DIGITAL COMMUNICATIONS

In our agency, Digital Communications involves any marketing and advertising efforts utilizing online channels like web, database, mobile and social.

To understand how your customers should and/or will interact with your site, a good practice is to get on your competitors' websites, and make note of the overall user experience: what functionality they have included? How is content presented? How easy is it to navigate? Is it as informative as it needs to be? Does it compel you to take action? All of these factors should be considered when designing your own website and planning your digital presence.

Keeping these design factors in mind, translating and importing your Brand Characteristics, USP, and Reasons Why becomes the primary Objective. Visualize your website as your company's brochure and spend time developing your story in the most provocative, informing, and compelling way. Think "sequence", I like to do it in "chapters", and take your audience down a logic path that results in the desired outcome. As my partner says, "the website should be the company's most competent salesperson"

When actually building the website, it is critical that content be presented in a manner that lends itself to an optimum user experience across every applicable device, ranging from desktop and laptop to tablet and smartphone.

Managing traffic to and from the website is the next item on the agenda. Organic search, paid search, social media, email, and display advertising are representative channels that can be used to drive interaction with your website.

The manner by which these channels are employed, however, needs to be planned within the context of your overall strategy. For example, which social media networks are best suited for B2B vs. B2C marketing? How to properly utilize social media networks to drive organic search performance? When and how to use paid search vs. display advertising vs. paid social media ads? What strategies are best for driving engagement and which are best for growing Brand awareness?

Just as experienced personnel should be included in creating sound Institutional Advertising and Direct Marketing, so too should experts in Digital Communications be enlisted for development of your digital marketing presence.

PRINT PRODUCTION

Print production is fairly straight-forward. Once an ad is approved, the Art Director takes the project from comp (short for comprehensive and a reference to the concept stage) to mechanical (finish or “press-ready”). Whether an ad, a 12-page brochure, or a Direct Marketing program, the cost is primarily time-of-staff in finalizing the work.

However, a significant expense can be associated with photography. Since the advent of stock photography, and the ability to choose from tens of thousands of professionally shot images made available through on-line stock libraries, clients are able to enjoy real cost savings when compared to doing custom shoots. Unless specificity is required – use stock.

Regardless of the production components required, don’t skimp on the finished product. If you allocate, say, 10% of the total print media expenditure to production, and it translates to a great representation of your Brand, then the other 90% of your budget is poised for results.

BROADCAST PRODUCTION

Television production is completely different, as, in most cases, it requires a third-party, off-site production facility. As one can imagine, television production is initiated by the writing of a script by the copywriter and the creation of story boards by the Art Director. Once completed, issues like casting, film crews, location, etc. become the challenge.

According to a survey of AAAA ad agencies, the average cost of producing a national 30 second TV spot in 2011 was approximately \$350,000 (see: http://www.aaaa.org/news/bulletins/pages/tvprod_01222013.aspx), a cost that included strategy, creative, talent, and pre and post production. Television production for the regional or local advertiser is far less.

Like most creative assignments, the driver for a TV spot is the "Big Idea". A good agency can develop the appropriate concept, and, in many cases, a cost-efficient commercial can be built by utilizing stock footage and local talent. In some cases, based on the placement of an advertising schedule or "Buy", the agency can actually produce the spot at a local television station at virtually no cost for production time. If you have an experienced agency person overseeing the production, don't get hung-up on the "where", just concentrate on the "how".

Regardless of the production direction chosen, the content is the key. Don't spend a nickel on media without the proper messaging, and one that supports the Brand Characteristics, USP, and "Reasons Why" against the stated Target Profile.

Radio production is similar, in so much as production can be coordinated through a recording studio or, depending on the "Buy", at the station.

When reviewing creative ideas for radio, have your creative team record the spot on a phone, with sound effects from free on-line libraries. It won't be clean or polished, but you'll get the idea. Then, live with it awhile. I probably listen to a rough recording 50 times before I go to production, and based on refining, the product changes dramatically.

DIGITAL PRODUCTION

Digital production starts with the website. In my mind there are two primary costs associated with website-building: One involves the selection of the development platform and its corresponding functionality, and the other, the Brand import, as it applies to content. Neither can be short-cut.

Content Management Systems (CMS) have evolved considerably over the past several years, to the point where very robust, scalable and feature-rich websites can be built on CMS platforms. As a result, the cost and time for custom website development has been dramatically reduced. Most of our website development utilizes the Wordpress CMS, upon which we will select and customize a template that meets the needs of a client as defined during the Branding process.

Don't compromise in the selection of the template, as it represents the foundation which all of your website-building is dependent. Spend the necessary time to define all of the component needs you want from your site; get counsel from the agency's digital marketing expert; and research examples of the suggested template's capabilities. There will more than likely be some custom coding required to get all the necessary feature functionality in place but, as a rule, we see about 50% of the total website-building costs associated with this facet of the process.

The other 50% is Content, which refers to the communications within the site. Like any marketing and advertising challenge, content should be Brand-driven, with a constant sensitivity to the USP and Target Profile. As stated in the Marketing Channels section, I like to develop website content in sequential chapters, with an introduction, topic beds, and close. Too many websites bounce around without section connectivity, which results in fragmented subject matter and a drifting of Brand focus and USP. Everything you address needs tethered to the Brand, no matter if it's the Home page, About Us, Product, Management, etc. sections – all have one thing in common – the Brand.

Beyond the website, other digital channels such as search, blog, social and display advertising need to be assessed. Certain channels are positioned primarily to drive traffic to your website (e.g. organic and paid search), while others are positioned to grow Brand awareness and Brand engagement (e.g. social media, blogging and display advertising). Each of these channels require an effective content strategy, with the objective of stimulating provocative dialogue that supports positive Brand conversation, looping-back residual benefits to the company or product.

EXPANDING THE CUSTOMER BASE

Beyond the mission of generating new business is the challenge of retaining existing customers and leveraging those to acquire referrals.

An article in Forbes, written by Alex Lawrence, addresses the subject of customer retention (<http://www.forbes.com/sites/alexlawrence/2012/11/01/five-customer-retention-tips-for-entrepreneurs/>). In that article, he includes the following reflections:

- It's far easier (about 50% easier according to Marketing Metrics) to sell to existing customers than to brand new prospects
- According to Bain and Co., a 5% increase in customer retention can increase a company's profitability by 75%.
- Gartner Group statistics tell us that 80% of your company's future revenue will come from just 20% of your existing customers
- Lee Resource Inc. states attracting new customers will cost your company 5 times more than keeping an existing customer

We see examples from every B2B and B2C vertical expending retention efforts in the form of Frequent User, Loyalty, and Club programs.

Within those systems resides an equally important opportunity - the Referral Program. Referral Programs encourage existing customers to recommend friends, family, colleagues, business associates, and others within their sphere of influence.

There are a number of substantive articles and studies written on the topic of Referral Programs.

In an attempt to communicate a few relevant statistics, I've assembled the following:

- "The Wharton School of Business found that a referred customer has a 16% higher life-time value."
- "People trust friends and family more than virtually any other information source, and pay 2x more attention to recommendations that come from friends than other sources."
- "83% of satisfied customers are willing to refer products and services. But only 29% actually do."
- "A University of Chicago study found that non-cash incentives are 24% more effective at boosting performance than cash incentives."

An important component of a successful Referral Program is to not only incentivize the referring party, but to offer value to the party referred. Too often marketers miss the fact that most people are hesitant to profit from referring a friend or colleague. To negate that hesitation, A Referral Program should include an offer to the new prospect that represents perceived value.

A good agency understands Loyalty and Referral programs and should include recommendations regarding their inclusion within the marketing mix.

MEASURING AND MONITORING YOUR ROLL-OUT

Part of designing any advertising or marketing plan includes understanding the yield metrics. In short, your agency needs to work through the break-even on your investment.

Let's assume you've spent \$5,000 in creative and production on a television spot. In addition, you are spending \$45,000 on a media schedule.

Let's also assume you are selling a \$5,000 product with Cost of Goods Sold (COGS) at \$2,000 and that your fixed and variable costs are not impacted by what product sales are generated from the advertising.

You have \$50,000 in expenditures, with \$3,000 offset from each sale. Accordingly, you will need to sell 16.6 products to break-even.

At that point, you have gotten back your entire investment and everything you sell beyond that break-even represents Gross Profit, after COGS - with a Brand-building bonus, based on the exposure you have received.

You have probably heard the phrase "Integrated Marketing and Advertising". It is nothing more than a reference to the employment of some combination of Institutional, Direct, or Digital media.

Good Strategic Planners think in terms of multiple media (media mix) and understand how the combination of billboards for example, creating awareness of the Brand and placing emphasis on a campaign tagline, can support and accelerate the Impression process sought through, say, radio.

Developing break-evens based on an Integrated Marketing and Advertising approach can be a bit more complicated. The simple approach is to merely total all the costs and divide by the Gross Income related to product sales. However, good marketers are constantly tasking themselves with identifying what media is most efficient. Therefore, when possible, implement measureable response activities that can be associated with each, then, assess each media effort individually, based on its direct contribution.

Too many business owners view advertising as an expense. They shouldn't, as, if executed correctly, it's an investment with an expectation of a positive return (ROI)

ESTABLISHING A BUDGET

You're probably asking yourself if there is a suggested approach to "Budget Allocation".

The answer is simple, there really is no formula. If you're a new entry, or aggressively competing, you might choose 10% of Gross Volume. If you are service-based and have no COGS, you might choose 20% of Gross Income. If you're conservative in your projected growth, or in a maintenance mode, 5% of Gross Volume might be applicable.

A good agency will assess your Competitive Positioning in the marketplace; help you define realistic Objectives; review your financials; and then give you counsel based on a "what I would do if it were my business" mentality. Sure, there are industry comparables you can use, but, in my experience, a very personalized approach to budgeting is most advantageous.

My recommendation is to take 5% of your Gross Volume as a starting-point, then meet with an agency representative and get a feel for their average client size. If you are within their client profile range, they will tell you. If not, they will make a recommendation as to a company that is.

10 GOOD REASONS TO WORK WITH AN AGENCY

Agencies:

1. offer clients the opportunity to leverage experienced skill-sets against each of the components involved in an advertising campaign or marketing program - *Don't pay for learning by "trial and error"*
2. are formally trained in solving advertising and marketing challenges, and draw from a myriad of past experiences - *There's no efficiencies in "reinventing the wheel"*
3. address client challenges from a third-party perspective and bring an objective point-of-view - *It's easy to fall-in-love with a bad idea. Good agencies don't, as they want to win. Successful campaigns build agency reputations.*
4. understand the value of the Brand and are committed to its stewardship - *Agencies want to build Brands (and client relationships) long term and understand how fragile they are.*
5. assess a client's competition and capitalize on their client's USP - *Don't bring a knife to a gun fight. Understand your opponent.*
6. research client's Target customers and build meaningful plans - *If you don't know where you're going, any path will take you there.*
7. guide clients methodically in choosing Positioning strategies designed for long-term growth - *Every successful effort is built on a solid foundation.*
8. don't sell media. A good agency has no bias towards any particular advertising or marketing vehicle - *You buy the product, not the salesman.*
9. save clients money by understanding the best use of their budget and recommending only those expenditures offering the greatest ROI - *If you're not in it for a profit, why do it?*
10. build their agency based on their track record. Client success is critical to their survival - *Everybody loves a winner.*

CONCLUSION

As stated from the onset, this writing has not been intended to represent an all-encompassing view of the marketing and advertising agency process, but rather, a guide for small to mid-cap entrepreneurial business owners in managing campaigns and programs in conjunction with an advertising agency.

To all those embarking on their first agency experience, take resolve that the included information is based on decades of experience. For those that have previous experience with an agency, the hope is I might have offered a few worthwhile observations that will enhance the relationship.

As Vince Lombardi once said, "The only place success comes before work is in the dictionary". With that as a guide, insist on an agency that loves to work, and then, participate as a partner in creating work that you love.



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