



Deltek

# THE AGENCY OPERATIONS PLAYBOOK

➤ A ROADMAP TO LONG-TERM SUCCESS



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**INTRODUCTION**

# Level Up Your Creative Operations

**WHY IMPROVING PERFORMANCE MATTERS**

Advertising and marketing agencies are undergoing rapid transformation and businesses are moving at an exponential rate. The growing shift to digital services coupled with increased competition and demand from clients putting pressure on margins has made it increasingly important to deliver projects on time and on budget while building a healthier culture and work/life balance. We have identified four key areas that can help agencies optimize their operations.

Leaders looking to level up their agencies often ask:

- How can I increase project delivery capacity without sacrificing quality of work?
- How can I develop our talent and culture into a competitive advantage?
- How can I increase our profit margins without relying on reduced fees or discounts?
- How can I deliver a long-term roadmap to grow the agency?

If you are looking for answers to the above questions, and ways to level up your agency to find long-term resilience and success, you have come to the right place. This playbook will walk you through the steps you need to take in order to build impressive project delivery, retain the best talent, maximize efficiency and profitability, and a plan for future growth for your agency.

## How To Use This Playbook

Treat this playbook as a reference guide for business transformation (which sometimes occurs in a series of smaller steps):

1. **Read the entire playbook for an overview of how the most successful marketing agencies level up and consistently win.**
2. **Check the boxes that resonate with you on the “Assessment Checklist” on the next page to determine where your organization sits in terms of maturity and goals.**
3. **Next, focus on one of the four “plays” and work through the play’s actionable checklist to achieve outcomes that level up your agency.**
4. **Consider the next play to tackle.**
5. **Repeat, with a focus on a long-term plan for success.**

## What’s Your Next Play?

In this playbook for improving agency operations, we’ll dive deeper into four key plays every agency should focus on. Every team is different, so some plays will be more important than others based on where you are in your journey. Use our self-assessment on the next page to help you get started.

### »» Play 1: Improve Project Delivery

As a project-based business, your agency’s reputation will be built on how you deliver your work. Agencies that effectively manage their projects and resources will be able to deliver on time and on budget.

### »» Play 2: Invest In Talent and Culture

The strength of your agency is built on the strength of your employees. Invest in the right talent, and nurture them with your unique company culture to build a competitive advantage for both your people and your agency.

### »» Play 3: Increase Profitability

Projects and talent will only get you so far – you need to include a focus on efficiency and profitability in order to drive financial success.

### »» Play 4: Implement a Plan for Growth

Once you’ve established an optimized mix of projects, talent, and profitability, you’re ready to turn your attention to building a long-term plan for growth.



# Assessment Checklist: Are We Positioned for Exceptional Project Delivery, Talent, Profitability, and Growth?

Which key pillar impacting your agency’s long-term success needs the most attention? Check the chart below in this self-assessment to learn more and determine which efforts can deliver the most transformative results.

Success Pillar	Level 1	Level 2	Level 3	Level 4
<b>Projects</b>	<ul style="list-style-type: none"> <li>• Spreadsheet management</li> <li>• Firefighting deadlines + constant chasing</li> <li>• Manual project creation and guesstimating</li> </ul>	<ul style="list-style-type: none"> <li>• Agency project management system deployed</li> <li>• Real-time budget vs actuals</li> <li>• Better process + project creation automation</li> <li>• Resource planning</li> </ul>	<ul style="list-style-type: none"> <li>• Agency capability KPIs in one click: profit center, department, teams, offices, divisions, client products, +more</li> </ul>	<ul style="list-style-type: none"> <li>• Data integrity</li> <li>• Effective resource planning: optimized for scale</li> </ul>
<b>Talent</b>	<ul style="list-style-type: none"> <li>• Spreadsheet management</li> <li>• Collaborate using email</li> <li>• Scheduling war</li> </ul>	<ul style="list-style-type: none"> <li>• Mobile task management</li> <li>• Optimizing utilization</li> </ul>	<ul style="list-style-type: none"> <li>• CRM and forecasting for accurate FTE planning</li> </ul>	<ul style="list-style-type: none"> <li>• Workload + culture balance/blend</li> <li>• Enhanced people development</li> <li>• Self-guided people learning path</li> </ul>
<b>Profitability</b>	<ul style="list-style-type: none"> <li>• Spreadsheet management</li> <li>• Lack of data reliability: no trust</li> <li>• Not predictable</li> </ul>	<ul style="list-style-type: none"> <li>• Trend analysis</li> <li>• Accounting system separate from project - integration to another system is necessary</li> </ul>	<ul style="list-style-type: none"> <li>• Strategic pricing analysis: tighter and accurate estimating</li> <li>• Project finance and complete accounting in ONE system</li> <li>• Fast + effective invoicing and accounting period close</li> </ul>	<ul style="list-style-type: none"> <li>• Agency-specific system FULLY integrated with finance and accounting</li> </ul>
<b>Growth</b>	<ul style="list-style-type: none"> <li>• Spreadsheet management</li> <li>• Pricing guesstimates</li> </ul>	<ul style="list-style-type: none"> <li>• Monthly revenue forecast process</li> <li>• Tracking all sales activities</li> </ul>	<ul style="list-style-type: none"> <li>• Fully integrated revenue forecasting</li> <li>• Clear view into your pipeline</li> </ul>	<ul style="list-style-type: none"> <li>• Focused 3/5 year strategic plans</li> <li>• Client portfolio aligned with your positioning</li> </ul>



## PLAY 1

# Improve Project Delivery

### START WITH EFFICIENT PROJECT AND RESOURCE MANAGEMENT

You made the pitch, and captured the interest of your client. The next steps will determine how smoothly the project process goes for your agency – and whether you successfully impress your client upon delivery.

By starting with efficient project and resource management processes, you will be able to deliver the project on time and on budget. Agencies that master exceptional project delivery will find that success leads to better retention and development of talent, increased profitability, and a faster trajectory to scale for future growth.

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*“Organizations that use proven project management practices waste 28x less money than their more haphazard counterparts.”*

>> cio

# 6 Steps to Deliver Projects On Time and On Budget

## 1. Review your ongoing processes

Before you kick off any new work, review your internal project and resource management processes. Regular timekeeping will help you establish an accurate view into how long your team is spending on various projects and tasks. Review the calendar weekly for any potential staffing conflicts to ensure all your bookings are properly resourced. Project managers should at minimum provide monthly reports on progress and completion status of projects. Whether you invoice clients monthly or as work is completed, invoicing must happen on a consistent schedule to improve cash flow.

## 2. Confirm a precise scope of work

A critical component of any project's success is a clearly defined scope of work. The more you can get the client to specify their exact needs and expectations, the fewer surprises will come your way as the project progresses. In addition to a signed Statement of Work, consider establishing a process to help mitigate over-servicing.

## 3. Set your project budget

Once you've built your project and resource management foundation, you should have a clearer picture of your true costs, which can help you develop better pricing. With a more accurate price quote and cost estimate in hand, your project manager can create a more realistic budget with which to measure project progress.

## 4. Establish the right project team

Take the time before the project begins to staff the project with the right people for the job. Determining who the right decision makers and team leads are ahead of time will help you to select the best team with the right skill set for the project, ultimately saving you time down the road.

## 5. Kick off the project and get everybody aligned

The Statement of Work is signed, the budget is set, but the project kickoff will be the first chance for your client to really see how you execute work. Establish deliverables, governance, and a clear timeline so everyone starts with aligned expectations. Make sure the right people are in the room for each phase of the project kick off.

## 6. Follow up with progress management

Once the project is underway, progress management should become a top priority. Manage progress through regular meetings and provide clear assignments to the team. Establish formal progress reporting that is regularly communicated and provides accurate visibility of the project status to the client.

### CASE STUDY: WE ARE SOCIAL

## Improving Project Health

We Are Social is a growing global agency that delivers world-class creative ideas with forward-thinking brands. They had faced multiple project management challenges: disparate bespoke business systems, limited collaboration, and manual resource management using spreadsheets. Since implementing an integrated system, the agency has improved visibility of resources and projects and greater collaboration between teams. Complete transparency into clients, projects and resources has led to better project health.

## SPOTLIGHT:

## 3 Agency Project Management Killers

### 1. Improper scoping

Successful projects start with an accurate, realistic, and detailed scope of work. Without a well-documented and agreed upon plan, scope creep and over-servicing will tank your agency's profits. To avoid scope creep, agency project managers should:

- Have a clear vision for the project and agree on milestones, goals, and success measurements with your client and project team.
- Plan for changes in your project. Change is inevitable even with the best of plans. Allowing for some flexibility in your project will empower your project team to make necessary adjustments and changes without risking deadlines.
- Communicate clearly and often, and if possible – centralize project communications to make it as easy for both your project team and client to collaborate.

### 2. Not having a risk management plan

Risk management is one element of great project planning that is often missed. When you plan ahead for the worst case scenarios you can mitigate risks faster, keeping your projects on track. Common risks in agency projects are:

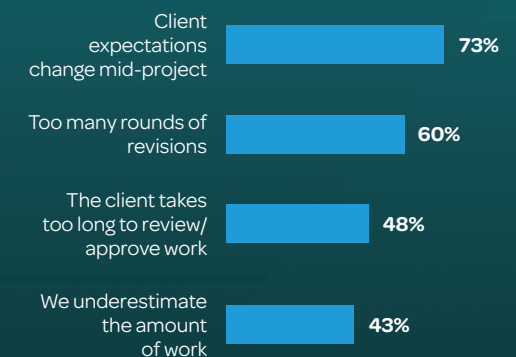
- Time and budget misallocation
- Communication breakdowns and misunderstandings
- Re-work and revisions
- Scope creep and over-servicing
- Resourcing issues

### 3. Poor resource planning

While it can be tempting to start a project with whomever is available, having the right people on a project will save you time, protect your project's profitability, keep your team from becoming frustrated, and most importantly ensure your project's success.

Resource planning fails when the process isn't clear, isn't documented, and is overly complicated, so keep it simple!

#### Top four reasons a project is at risk of being delayed or going over budget



from *Facing the Future: A global snapshot of agency trends*, Campaign



# Checklist: How to Improve Project Delivery

**Review the checklist of key items your team should consider tackling to master Play 1: Improve Project Delivery.**

Check all of the items that you have already put in place, then work through the rest to complete this play and level up your agency.

- Make it as simple as possible to submit time accurately and promptly, without hindering the creative process. Hours should be controlled with approval on a weekly basis.
- Weekly project staffing process – clarify bookings on a weekly basis and shift staffing assignments as needed.
- Manage staff capacity to avoid idle hands or burnout.
- Evaluate the remaining plan on a monthly basis and take proactive action to avoid budget overruns.
- Formal progress reporting - project managers should manage progress through weekly stand-up meetings, with more in-depth reporting either as part of month-end or more frequently.
- Monthly control: as part of the finance team's month-end, project managers should provide detailed follow ups on the status of a project and evaluate the progress in terms of the value and percentage of project completion.
- Standardize Statements of Work by developing templates and a process to help mitigate over-servicing.
- Identify the most profitable capabilities in your agency's performing competencies – supported by data that you can trust. This should inform your new business strategy with better predictions of projects that will succeed or fail.
- Build a risk management plan to give your team a plan of attack in case issues like time and budget allocation or re-work arise.
- Develop project templates to help your team become more consistent with each project.
- Implement an agency management system to help standardize processes, streamline efficiency, and increase automation.

## PLAY 2

# Invest In Talent and Culture

**BUILD A CULTURE THAT ATTRACTS TOP TALENT**

Competition to attract and retain top talent is fierce, and the more time you spend recruiting or onboarding employees, the less time is spent on billable work. An investment in developing talent and an appealing culture for your agency will ultimately result in a happier and more efficient workplace.

The capacity to build and maintain a strong cohort of creative professionals is fundamental to executing the other three plays of this playbook:

- **Projects:** Assigning the right people to the right projects and tracking utilization will help to improve the velocity and quality of project delivery to your clients.
- **Profitability:** Aligning hiring decisions with projected revenue will help you to increase profitability.
- **Growth:** Knowing when to bring in freelancers while reducing turnover will ultimately help drive agency growth.

# 6 Strategies for Investing in Talent and Culture

## 1. Set the right project team

Projects fail when you staff them based on availability instead of those with the right skills for the job. Gather the right managers to select the right team, especially on bigger projects, from beginning to end.

## 2. Know when and how to leverage freelancers

Freelancers are a vital part of the agency business. However, it can become costly if you don't control their usage. Set up a process so resource managers are notified before a freelancer purchase process is initiated so they can help you make the best decision for the project and the budget.

## 3. Measure and optimize utilization

Utilization is the best KPI to measure when it comes to the maximization of return on employee efforts. Start with a resource overview, so you know what everyone is working on. Manage your bench, and provide coaching for those that are under-utilized. Resource managers should be reviewing available hours for all employees on a weekly basis, and making sure billable work has been assigned. Evaluate actuals against bookings to track realized utilization versus planned so you can inform future resource planning.

## 4. Forecasting revenue and people

Hiring decisions should always be based on revenue and resource data. Revenue forecasting should be done on an ongoing basis to have a view of upcoming billable work. Build a long-term resourcing overview so you can evaluate what types of employees will be needed for upcoming opportunities.

## 5. Provide development and learning opportunities

One of the best ways to build employee loyalty is to show staff that you are investing in their professional development and growth. Hungry talent will be looking to nurture new creative skills or leadership opportunities. By providing these opportunities within your agency, you will be better equipped to retain talent, reduce turnover, and develop a stronger pool of skills to leverage for new projects.

## 6. Build an appealing culture

Competition for top talent is tough. By developing a culture unique to your agency, you will not only build camaraderie amongst your staff, but it will also serve as a recruiting tool to draw in talent looking to thrive in the culture you've built.

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*75% of agency leaders in the US, and nearly half of those globally (49%) claim that **"Attracting and retaining the right talent"** is a top challenge*

» 2020 DIGITAL OUTLOOK FROM SODA + FORRESTER

# Checklist: How to Invest In Talent and Culture

Below is a checklist of key items your team should be considering to master **Play 2: Invest in Talent and Culture**.

Check all of the items that you have already put in place, then work through the rest to complete this play and level up your agency.

- Set up an onboarding process to help new employees feel part of the company's culture and establish a path for growth.
- Build a plan for continuous mentorship of new employees.
- Staff projects with the right staff with the right skills for the job.
- Track utilization to make the most of your team's time and mitigate burnout.
- Establish a process to manage hiring freelancers.
- Build a long-term resourcing overview to identify when to downsize or begin hiring.
- Match pipeline and revenue with capacity to establish the right level of full-time and freelance staff.
- Invest in tools to minimize headaches with task management, collaboration, and make time tracking easy.
- Encourage managers to take a hands-on approach to coaching.
- Provide opportunities for growth and ownership to encourage employees to remain with your agency as they build their careers.
- Consider culture as a competitive advantage and a recruiting tool to retain and attract top talent.

*"76% of millennials consider **professional development opportunities** to be an essential element of company culture"*

➤ EXECU-SEARCH



## PLAY 3

# Increase Profitability

### IMPROVE CASH FLOW WHILE MANAGING COSTS

If you have the right processes, the right resources, and the right people in place, you're well on your way to increased efficiency and profitability.

When you have control of your budgets in real-time, you will be able to quickly adjust resources and timelines as priorities change, resulting in more proactive project management. Efficient processes will enable employees to spend less time on non-billable and administrative tasks and more time focusing on what's important. Increased margins and an accurate view of your costs will power your agency to record growth in record time.

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*From a project management perspective, lack of a **view into over-servicing (53%)** and **lack of budget management/processes (41%)** were the top issues that impact profit most for agencies*

>> THE SODA REPORT ON AGENCY OPERATING PRACTICES

# 6 Components of a Highly Profitable Agency

## 1. Accurate Estimates

With greater visibility into your agency's project data, you can glean better insights and more accurately predict the time and resources a new project might require. Track your project history and use it effectively to inform new project estimates.

## 2. Healthy Staff Capacity

Your employees are your greatest asset, as well as your largest cost. They define your agency's ability to execute on client needs. But without complete visibility into staff capacity, you don't know how many projects you can take on or how much you're wasting on under-utilized resources or unexpected freelance costs. With a clearer line of sight into agency capacity comes better insight into agency capabilities, allowing you to ensure money is being spent effectively.

## 3. Effective Time Tracking

Timesheets are the biggest hurdle to getting you the most accurate budget information in real-time. Who wants to get hit with giant overrun after it's too late to do anything about it? Easy-to-use, mobile-friendly time tracking methods are a must for any project-based agency. The simpler it is for your employees to track and submit time the more likely they are to use it effectively, giving you the information you need, when you need it.

## 4. A Healthy Pipeline

A healthy pipeline is the lifeblood of a project-based agency. It feeds your bottom line and nourishes growth. It's crucial that your agency knows exactly what kind of work it excels at and what is most profitable. By tracking and analyzing historical project data you can be sure your agency is chasing the right types of leads and landing more projects that contribute to your bottom line.

## 5. Scope Creep Control

Extra items are sure to be added to the scope after fees have been established. But spending time on something that you're not being paid for eats profit margin and negatively affects morale. With an early-warning system and an informed account services team, you can see scope creep coming and take action. When you have accurate, real-time data and can provide the client with greater transparency into the project you'll be better suited to re-negotiate.

## 6. Purpose-Built Agency Management Software

The right tool will effectively streamline agency processes so that employees spend less time on non-billable and administrative tasks and more time focusing on what's important.

**SPOTLIGHT:**

## The Pitfalls of Over-Compensation

**4 WAYS TO AVOID OVER-SERVICING**

As a business whose value is judged on the quality of service you deliver, it is all too easy for agencies to always want to go the extra mile for clients, both happy and unhappy. To address clients whose expectations haven't been fulfilled, many end up overcompensating to get back on track. This leads to a number of pitfalls: clients may begin to expect an increasing amount of work to be done and this consumes too many of your resources – for free; project scope becomes difficult to manage and milestones can be missed; and staff may feel overworked, stressed, and demotivated. See below for four ways to avoid falling into the trap of over-servicing.

**1. Enter all jobs with a clear scope & Service Level Agreement**

Matching project scope with a realistic estimate should be a priority for all agencies to prevent over-servicing.

**2. Review your business model**

Take a hard look at your business model to discover any issues that are leading to over-servicing and the poor usage of human time and financial resources.

**3. Achieve a servicing balance**

Remember that under-servicing clients is as much an issue as over-servicing them.

**4. Elevate staff as “visible experts”**

Use the most appropriate and objective metrics and measure the right key performance indicators (KPIs).

# Checklist: How to Increase Profitability

**Below is a checklist of key items your team should be considering to master Play 3: Increase Agency Profitability.**

Check all of the items that you have already put in place, then work through the rest to complete this play and level up your agency.

- Include the right contractual terms for the financials: clear definition of payments terms, make payments dependent either on clear deliverables or a specified payment plan, clearly state whether the project is fixed price or T&M, and outline how expenses will be treated.
- Establish a smooth and fast month-end process. Depending on your agency's workflow, you can potentially complete the month-end process in as little as a week by streamlining and optimizing the project lifecycle.
- Get timesheets and all project costs in immediately at the start of the month.
- Send out invoices and collect payments on time. The process starts with time and expenses, and is followed by invoicing regularly and collecting payment.
- Separate invoicing and revenue recognition, which will give you more time to evaluate the value of work in progress.
- Require project managers to evaluate progress and ensure they are accountable for any write downs.
- Make sure costs are controlled from request to payment to help manage unforeseen costs.
- Perform forecasting on a monthly, rather than yearly, basis. Monthly forecasting will provide more accurate insight into revenue and resourcing.
- Check monthly reports – insight at month-end is about your income statement, utilization, working capital, and future insights in terms of revenue stream and pipeline.
- Have a proper revenue forecast and capacity overview for 4-6 months ahead to help you make the most strategic and cost-effective hiring decisions.
- Save time by integrating your project finance and complete accounting into one system.



## PLAY 4

# Implement a Plan for Growth

**PLAN FOR LONG-TERM SCALABILITY AND A STEADY PIPELINE**

It's tempting to set the goal of growing and scaling your agency fast. However, growth without proper planning will likely set your agency back instead of helping you to succeed more quickly.

Establishing the right positioning, pricing, and portfolio will provide your agency with the stability needed to help your agency grow in the long term. Careful planning, a clear view of your pipeline, and establishing reliable partnerships will carry you forward to sustained success.

The thoughtful planning involved in building a long-term vision for your agency is fundamental to executing the other three plays of this playbook:

- **Projects:** Bringing in the right business will set up your agency to succeed with the type of work that you are best at executing.
- **Talent:** A clear view into your pipeline will ensure that you properly staff your agency with the right number of people and right skill sets for the projects you have lined up.
- **Profitability:** Careful resource planning and building effective client partnerships will lead to better financial success for your agency.



# 6 Pillars of Growth-Oriented Agencies

## 1. Positioning

Correct positioning should set your agency apart from the competition while remaining focused on the work you do best. But your positioning also needs to be compelling to the marketplace – don't get so narrowly focused that you leave yourself with too small of a pool of potential clients. At the end of the day, you should be confident in the work your agency does and its value to your clients.

## 2. Pricing

No matter your pricing model, don't forget to account for anything that pops up outside your scope of work and charge accordingly in order to limit over-servicing and scope creep.

## 3. Portfolio

Once you have the right mix of clients in your portfolio, they should be aligned with your agency's positioning. This will enable you to say

'no' to new clients that don't fit, setting up your agency to be more nimble in the long-term.

## 4. Planning

Revenue forecasting will help you determine when to make hires and understand where the company is heading financially. This forecast should reflect future revenue streams of both backlogged projects and incoming orders.

## 5. Pipeline

You need to have a clear insight into your future revenue streams and pipeline in order to manage your future. The pipeline should reflect a total value overview of potential incoming orders. Qualify potential work and track opportunities to provide valuable information you can use to inform your new business strategy.

## 6. Partnership

Agency-client relationships can be stronger than ever – as long as you create a culture of openness and collaboration. Being as transparent as possible with clients will help build trust that their projects are in safe hands, as well as encouraging them to understand and respect your timelines.

### CASE STUDY:

#### VERITAS COMMUNICATIONS

## Scaling Administrative Processes for Growth

Veritas Communications is a North American agency that walks the line between public relations and marketing to inspire positive word-of-mouth and drive brand preference. Veritas was trying to efficiently manage its rapidly-growing, fast-paced agency with an outdated project management system. The agency needed to reduce redundant administrative processes and get a complete view of their business to support their planned growth. They now have a scalable, industry-specific solution to support their growth. With real-time information, the agency can provide flexible pricing options to meet client needs.

*"The top three factors to an agency's success in a post-COVID era were identified as Top Line Revenue Growth (20%), Profit Growth (20%) and Increased New Business Wins (19%)"*

➤➤ 4A'S AGENCY GROWTH SURVEY, SEPTEMBER 2020

# Checklist: How to Grow Your Agency

Below is a checklist of key items your team should be considering to master Play 4: Implementing a Plan for Growth.

Check all of the items that you have already put in place, then work through the rest to complete this play and level up your agency.

- Revisit your agency's positioning – evaluate the work you are best at and want to focus on. Update all your outgoing messaging to match.
- Your client services or sales team should track all sales activities towards the clients on an ad hoc basis, and work with PMs on updating and creating quotes and estimates for potential work.
- Introduce a weekly process for employees to update pipeline and their CRM solution with prospect and client data.
- Review your revenue forecast monthly, updating the revenue stream per client – including both backlogged projects and opportunities.
- Establish a fully integrated planning process – including monthly capacity planning, automated backlog forecast, and pipeline forecast.
- Meet clients on a monthly or quarterly basis and have a template for agreeing on actions and deliverables to help create purpose in the relationship. This will also help you to understand what kind of projects to expect in the future.
- Develop a focused 3 and 5 year strategy plan for your agency – outline your long-term goals and map out how to reach them.

*In 2020, **67% of agencies** reported it's "harder" or "much harder" to obtain new business.*

>> 2020 RSW/US AGENCY NEW BUSINESS REPORT



## TECHNOLOGY

# Providing Faster, Stronger Play Execution

While any one of the plays in this playbook will give you tips and checklists you can use to level up your agency, without the right tools in place aligned to your processes, things can quickly fall apart. So, where does technology fit in?

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*“**Digital transformation** cannot be led by agencies that have not themselves transformed their ways of working, the mindset of their people, and their approach to the overall relationship with their clients. This is the exact same level of transformation that clients are not only expecting, but also need to undergo in order to remain **innovative, swift and competitive.**”*

>> JOSE MARTINEZ, GLOBAL HEAD, DIGITAL SERVICES, BLUE FOUNTAIN MEDIA

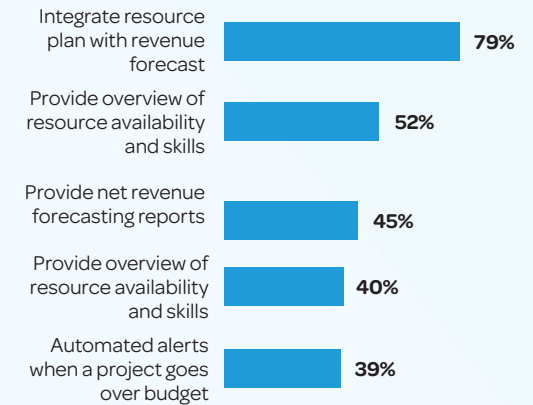
To start, the right technology will help you execute on these plays so you can level up your agency faster and more effectively. Better still, it provides you with unprecedented project visibility, one source of truth, and best practice consistency. It will enable you to run a more efficient, profitable, and client-centric business.

In many agencies you will still find a patchwork of solutions used to manage work and communications across teams and clients. This often includes a mix of free-to-use or low cost web based applications, email, spreadsheets, and even physical job jackets.

This approach can work for a while, but it's not scalable as your agency grows, nor will it give you the visibility you need into the health of your agency.

You'll find that an agency management solution that integrates your agency's pipeline, project, resource and financial management processes will give you accurate, real-time data and insights about your agency's overall performance, without getting in the way of the creative process.

### What capabilities do you think your agency management systems will need to have in the next two years?



from The SoDA Report on Agency Operating Practices

*"We moved to WorkBook to have a single platform for project management and overall agency financials. Now, just five months after launch, **we're already seeing increased efficiency and smoother communication, and we feel far better organized than ever before.** Like most companies that force themselves through massive internal process changes, we've adapted to some things quickly and easily while others have been more challenging; however, our entire Deltek team has supported us every step of the way, and we're so glad we took the leap. **We believe WorkBook will be a key piece of our agency's future success.**"*

>> R/WEST

# Checklist: How to Choose the Best Agency Management System for Your Creative Team

Use this checklist to help you think holistically about what the right agency management solution will look like for your team. Start with a deep understanding of your agency's current processes that you've built by completing Plays 1-4. This will enable you to factor in profitability and growth all the way through to project delivery. Look for these essential elements in your agency management system:

- Integrates agency operations from end-to-end, providing accurate, real-time visibility every step of the way
- Easy-to-use, mobile timesheets that will win over even the most skeptical creatives
- Flexible project and task management that fits your agency workflow
- Built-in collaboration features that store conversations and documents
- Employee utilization metrics and resource capacity visibility weeks/months into the future
- Balance workloads to provide the right resources for the right job, every time
- Boost productivity and optimize utilization through better project and resource planning
- Give account people the visibility they need to proactively address over-servicing
- Proactively manage budgets and monitor costs with real-time visibility into estimates vs. actuals
- Increase cash flow with efficient billing and revenue reconciliation
- Increase profitability and control costs by scoping accurately, increasing efficiency, and reducing delays
- Address overall profitability across an entire network of offices or agencies
- Modularity so your agency can grow with the same system over time
- Build a stronger relationship by giving clients and brand managers transparency via a client portal
- Makes it easier for clients to submit job requests and view project status
- Build a healthy pipeline with insight into incoming work and its impact on agency revenue and capacity
- A tool that is built to help you establish and follow industry-specific best practices

Deltek

# Is it time to level up your agency?

Deltek has provided technology solutions to hundreds of creative agencies—of all sizes, all over the world — looking to revolutionize the way they do business.

**IMPROVE PROJECT DELIVERY • INVEST IN TALENT AND CULTURE  
INCREASE PROFITABILITY • IMPLEMENT A PLAN FOR GROWTH**

**>> FIND OUT MORE**

