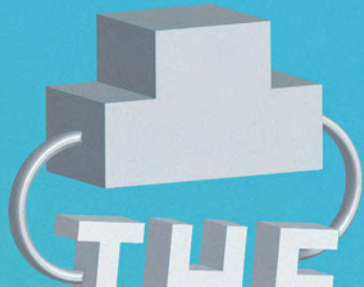


# the SoDA REPORT on



THE STATE

OF AGENCY

WORKFLOW

MANAGEMENT

*In Partnership with*  
**Deltek.**

**So  
DA**

# From the Executive Director

---



**Chris  
Buettner**

*Executive Director,  
SoDA*

Welcome to this special edition of *The SoDA Report on the State of Workflow Management*, developed in partnership with Deltek and Gotham Research Group.

Operations and workflow management are evergreen topics of conversation within SoDA. The executive leadership teams of our member companies from around the globe continually debate and discuss ‘best known practices’ for delivering groundbreaking digital experiences while also maintaining healthy margins and strong team morale. No small feat!

Knowledge sharing and radical collaboration are values we hold dear within SoDA. If there’s one thing that our members’ unique brand of crowd-sourced problem solving has revealed over the years is that there is never a one-size-fits-all solution to the ever-changing challenges faced by top agencies and other shops in this space.

One thing, however, is certain. Having baseline data and analysis to understand where the industry is now – in 2015 – on such key measures as average profit per project, scope creep and myriad other workflow variables that can help or hinder a company’s financial success is incredibly valuable. A desire to discover and share such insights with the broader industry was the impetus for this study.

This report is the first in a series of white papers we’ll be releasing under “*The SoDA Report on...*” moniker in order to conduct deep dives on a variety of issues impacting the companies and people who are creating the future of marketing and digital experiences.

I want to thank Deltek and Gotham Research Group for partnering with us on this project. To become a subscriber of *The SoDA Report*, please [email SoDA](#) and we’ll make sure you have priority access to the release of upcoming editions (including our 2H 2015 edition which will be released in November). We hope you enjoy this report and, as always, we welcome your feedback, ideas and contributions for future editions.

*In Partnership with*

**Deltek.**

# Team & Partners

---



**Chris Buettner**  
Executive Director

After a career on the digital agency and publisher side that spanned 15+ years, Chris Buettner now serves as Managing Editor of *The SoDA Report*. He is also the Executive Director of SoDA where he is charged with developing and executing the organization's overall strategic vision and growth plan. And with roots in journalism, the transition to lead SoDA has been a welcome opportunity to combine many of his talents and passions. After living in Brazil and Colombia for years, Chris is also fluent in Spanish and Portuguese and is an enthusiastic supporter of SoDA's initiatives to increase its footprint in Latin America and around the world. Chris lives in Atlanta with his wife and two daughters.



**Kimberly Sack**  
*Sr. Product Marketing Specialist*

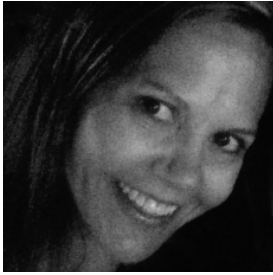
Kimberly brings over 10 years of experience in driving product innovations and helping to deliver industry leading solutions. She has worked with professional services organizations like Microsoft and its partners and is focused on working with clients to help bring products and solutions to market.



**Callum Broderick**  
*Enterprise Consultant, Marketing Communications*

Callum has more than 10 years of expertise in advertising and agency management. He started his career in independent design and e-commerce agencies and has not moved far from the creative and digital sector. This experience, supplemented by an in-depth knowledge of project management practices, allows him to assist teams in optimizing workflow, getting the most out of their resources and managing tighter budgets to

continually show the value of an in-house agency. Nike, JWT, Virgin Media, Hill and Knowlton and Procter & Gamble are just a few of the creative teams he has worked with.



**Stephanie Klaiber**

*Sr. Field Marketing Manager*

Stephanie brings over 12 years of expertise in creating holistic communication and demand generation campaigns, driving product marketing and development strategies, developing marketing communications, business analysis, and market feasibility studies. Her extensive experience comes from working with innovative technology companies like UUNet, MCI, Verizon Business, and Neustar.

## EDITORIAL & PRODUCTION TEAM



**Len Stein**

*Founder & President, Visibility Public Relations*

Founder of Visibility Public Relations, Len Stein helps marketing services companies establish industry thought leadership to enhance their competitive positioning. In the early dot.com era, Len wrote a series of “PR in Cyberspace” columns for ClickZ and for ChannelSeven. He currently contributes to *Branding* magazine, *Agency Post*, MediaPost’s *Marketing Daily*, *Bulldog Reporter* and *Talent Zoo*, exploring evolving communications technologies.

**Lakai Newman**, Head of Production, SoDA

**Jessica Ongko**, Designer, SoDA

## PARTNERS

**Cover  
Design**



**Content &  
Production**



**Report  
Partner**



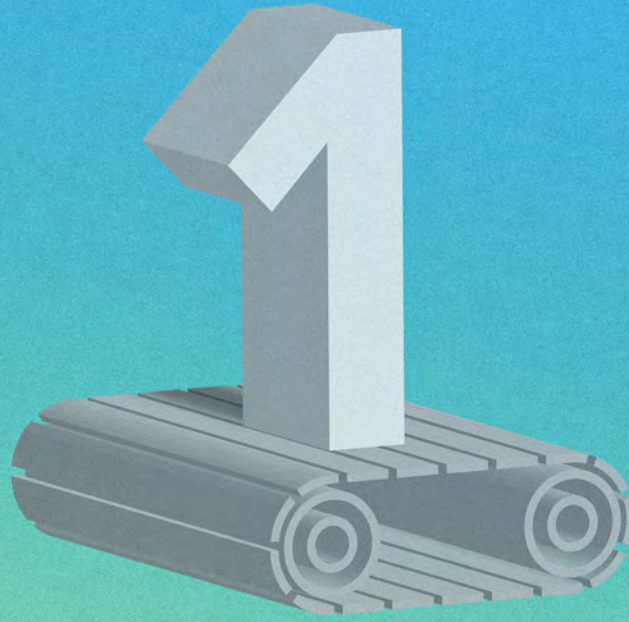
**Data Graphics  
Powered By**



**Research  
Partner**



The version of *The SoDA Report* was developed with a variety of solutions from the Adobe Creative Cloud.



- 1** Respondent Overview
- 2** High-Level Takeaways from the Report
- 3** The Impact of Project Management Solutions
- 4** Key Findings
- 5** Deltek Recommendations

*In Partnership with*

**Deltek.**

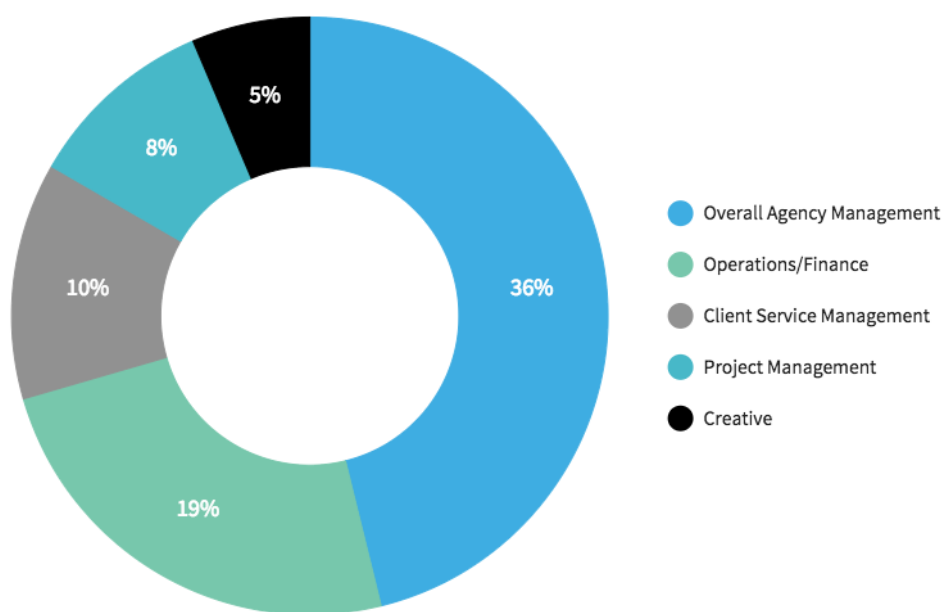
## Respondent Overview

The State of Agency Workflow Management survey polled 170 creative agency and client-side respondents.

### JOB LEVEL

Which of the following best describes your current job level?

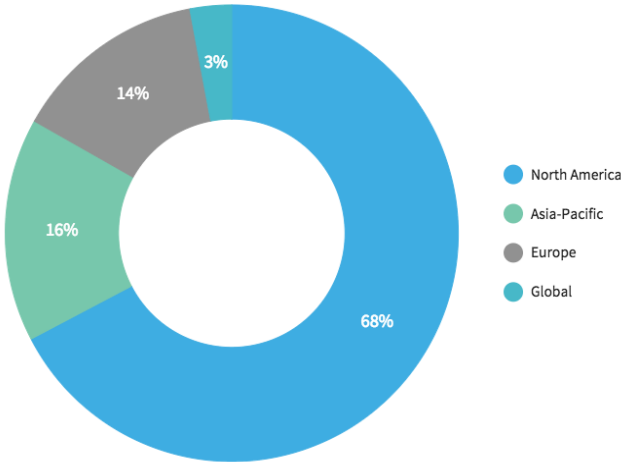
### Respondent Agency Role



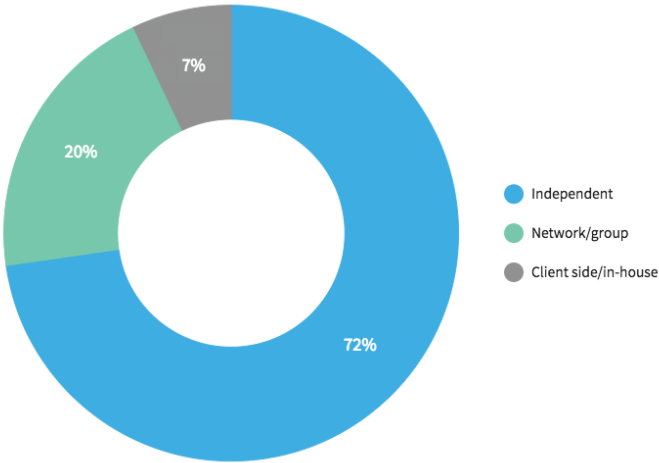
A strong 75% of respondents were key decision makers and influencers (C-Suite, Senior Executives, VPs and Directors).

# AGENCY STRUCTURE

Agency Location

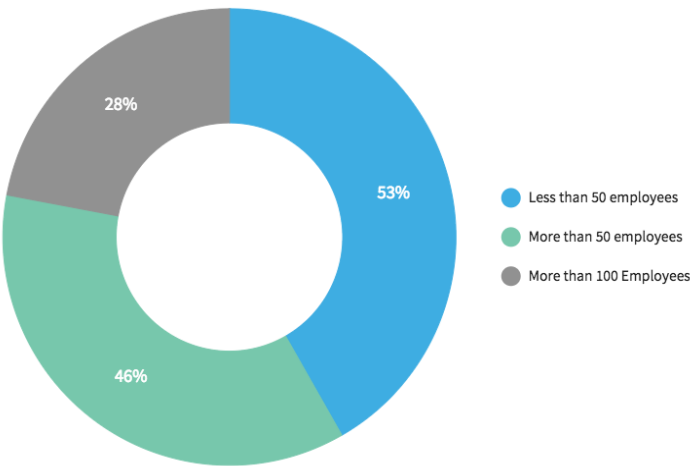


Agency Structure

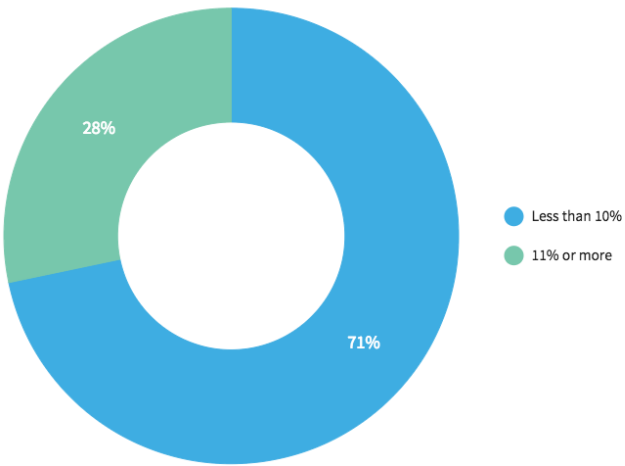


# AGENCY SIZE

Agency Size



Percentage of Agency’s Freelance Workforce

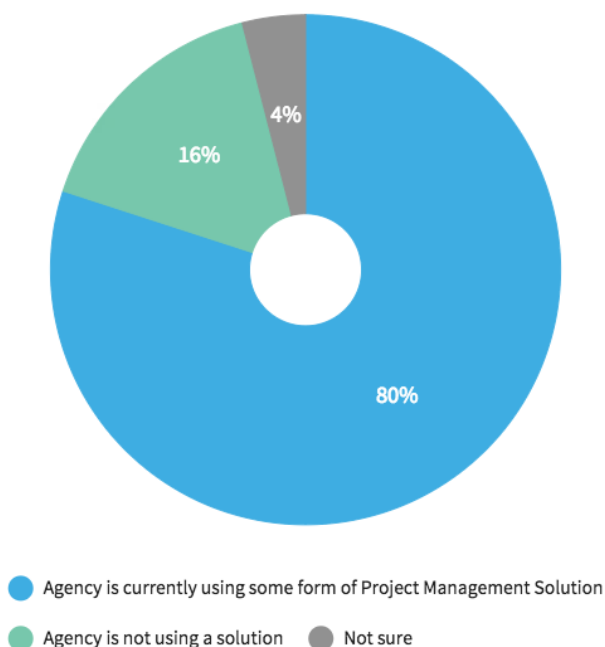


# High-Level Takeaways from the Report

Conducted by SoDA, in partnership with Deltek and Gotham Research Group, the State of Agency Workflow Management Survey provides fascinating insights into how agencies of all sizes use “perceived” workflow management tools and the operational efficiencies and profitability gained. Two significant “aha” moments were realized:

1. 80% of the agencies reported using workflow management tools. This was higher than anticipated and represented a variety of tools, including collaboration tools like Basecamp; stand-alone project management with Microsoft Project, as well as more comprehensive workflow and resource management solutions like Workamajig and Deltek TrafficLIVE.

## Is your agency using a Project Management Solution?



2. The definition of workflow management needs to be clearly defined and tied to industry benchmarks for profitability, resource utilization and real-time business metrics. While this is the first SoDA survey on agency workflow management, Deltek will continue to partner with SoDA to develop metrics that matter to digital agencies. As several of the authors of this report cited, there is no “perfect tool.” However, we can measure and monitor best-in-class agency performance to be a guideline to set expectations for workflow management solutions.

# The Impact of Project Management Solutions

---

Agencies are without a doubt embracing technologies to manage workflow more effectively, with 80% of respondents using a form of Project Management Solution. Based on this interesting insight and response – SoDA and Deltek decided to take a deeper dive to further evaluate how these solutions are helping agencies manage day to day workflow and the impact on three key categories:

- 1. Growth**
- 2. Profitability**
- 3. Visibility and Reporting**

The overall agency outlook and results of the adoption of technologies is promising. However, not so surprising, there are still several key areas that this industry continues to struggle with, which led us to a few more questions and analysis.

Are agencies in today's digital world able to effectively manage project workflows from conception to completion, and the ongoing evolution of the digital components? Are the solutions being used comprehensive enough to handle the ever-changing environment? Is there a perceived difference between project and workflow management solutions?

To further investigate, we had a few discussions with industry leaders to get down to the “brass tacks.” The discussions supported the overall survey findings that a majority of agencies are using some form of “Project Management Solutions.”

However, as we continued to probe, we discovered a consistent use of resources that are not particularly comprehensive or true “Project Management Solutions.” The use of what we would call “Project Management Tools,” such as Basecamp and Microsoft Project are more common.

While there seems to be interest in improving current solutions with a very emphatic – “it's a definite objective this year” – it was clear that this could be either a complete or partial solution that would help address specific needs. Nevertheless, they are all used to (and generally satisfied with) their current system – it's one that may need improvement (and may be inefficient), but still works.

Primary concerns around a comprehensive solution centered around two main factors:

- a- Significant concern about the potential cost of a solution (one person estimated it in the \$300-500k range). This is of particular concern, given that most are not acutely aware of the current cost of their system (and assume it's relatively low).
- b- The belief that products tend to be very "generic" and, therefore, not suitable for their specific business needs. They all want something that is customized.

### **On a Positive Note**

- All in all the industry looks to be in great health with over three-quarters of agencies seeing stable results or increased growth.
- Technology proves valuable to profit growth. 51% of the agencies using some type of "Project Management Solution" stated an overall net profit increase. In addition, 38% claim a profit increase of 11% or more.
- Among those who have experienced profit growth, new client acquisition is considered to be the overwhelming driving factor (76%). Increased competition, and less long-term retainer work means there is more business to be won and, for the smaller agencies, one or two major client wins in a year can make a huge difference to the base revenue of an agency and trigger significant growth.
- Other factors, such as resource management and real-time insights, are considered important to all agencies, but especially to smaller agencies where, perhaps, limited resources and room for error are less flexible and have more impact on the bottom line.
- Agencies are obviously putting an emphasis on visibility, resource availability and skills. This is the number one priority for 68% of respondents.
- Most of the agencies are taking advantage of technologies to better track, quote and compare actuals versus estimates. Interestingly enough, independent agencies, and those who use fewer freelancers, are particularly likely to have said systems.

### **On the Flip Side – Challenges Continue**

- There is no surprise that scope creep management is the number one issue for agencies when trying to remain profitable. It's a complex issue for agencies of all sizes, and if not tracked and managed correctly, the ultimate impact is on project and overall profitability.
- When asked how often they go over budget due to scope changes, 38% reported always/often and 46% sometimes. Noting these responses, it is not surprising that managing scope creep and its impacts was the number one profit eating issue at 63%.
- The second highest impact on profits may also seem obvious - lack of visibility into over servicing, at 57%. However, 55% claim to have in or near real-time reporting and notifications when projects go over budget.
- Scope Creep and Visibility issues – particularly the lack of a view into over-

servicing – remains the number one reason for lost profits. However, add in the issues with time tracking, billing delays and errors, there is an even more significant impact on profits. Combined, 84% of those currently using some type of Project Management Solution claim that timekeeping, billing errors and delays also eat into profits.

### **The Industry Remains Optimistic about its Future**

Of those agencies that are currently using some type of Project Management Solution, 64% are fairly to extremely certain of the sustainability of their business model for the next five years – leaving 36% that are not that certain or certain at all.

This is a clear indication that while there are still challenges in workflow management for this industry, agencies are investing the time and energy to improve their processes, empower their creative teams to be more productive, and looking for ways to continue to drive profitability- even when faced with clients' "Cheaper, Faster, Better" mindset.

*In Partnership with*

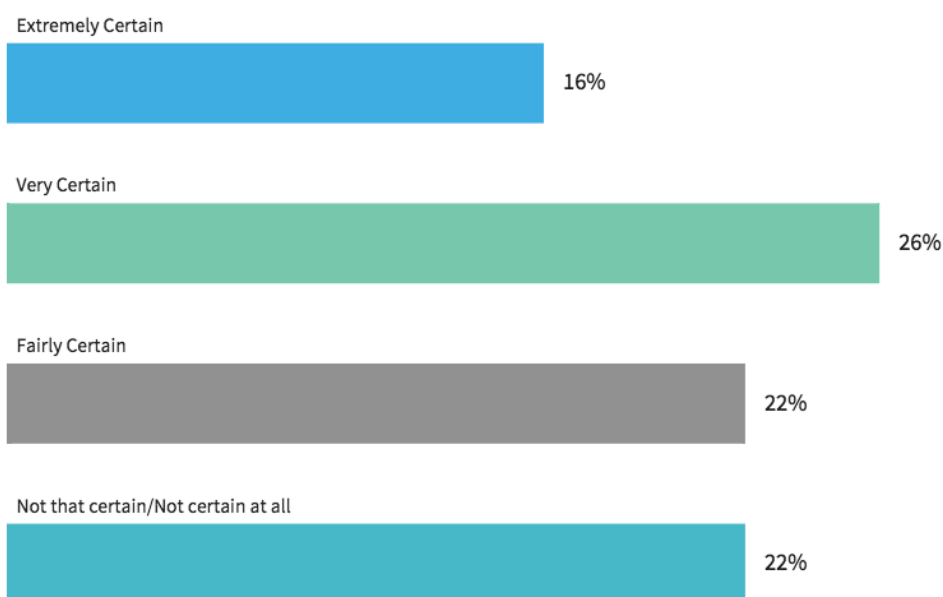
**Deltek.**

---

# Key Findings

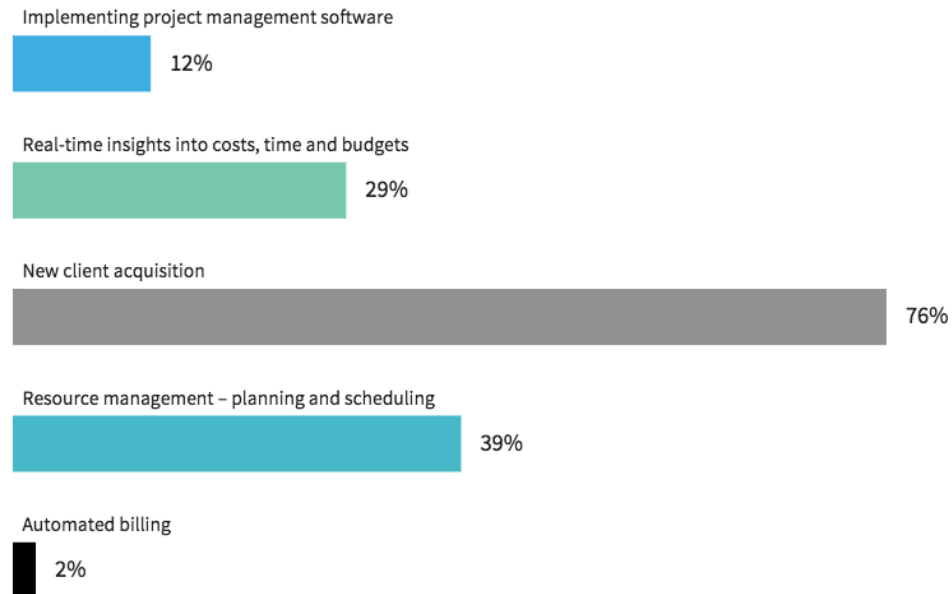
## GROWTH

### Is Your Business Model Sustainable?

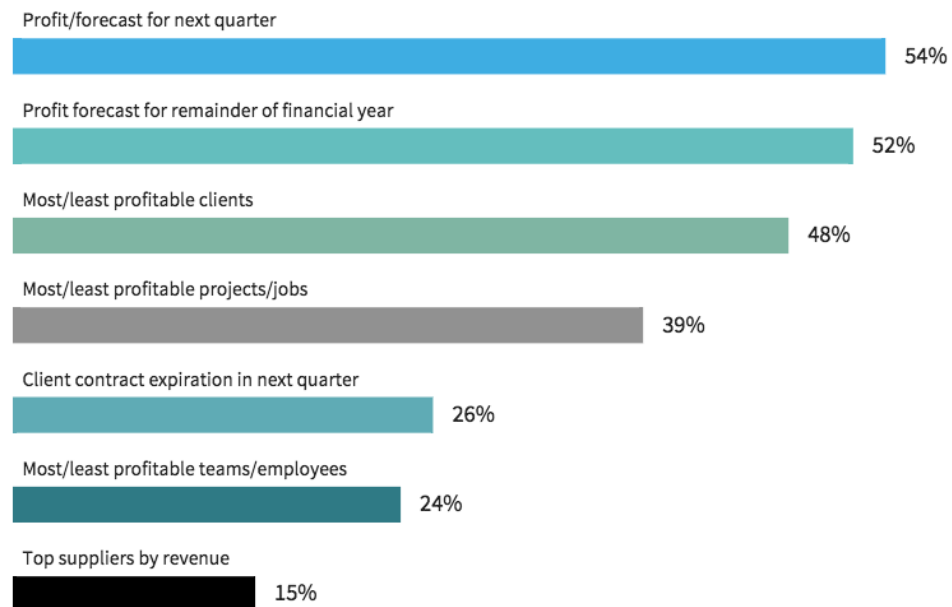


Overall, looking ahead, over 50% of agencies using some type of project management software are confident in the sustainability of their business models. Those experiencing profit growth claim new client acquisition is the overwhelming factor driving that growth, followed by efficient resource management and real-time insights. A key focus is the ability to forecast profits and profitability of clients.

# What Contributed to Recent Profit Growth?

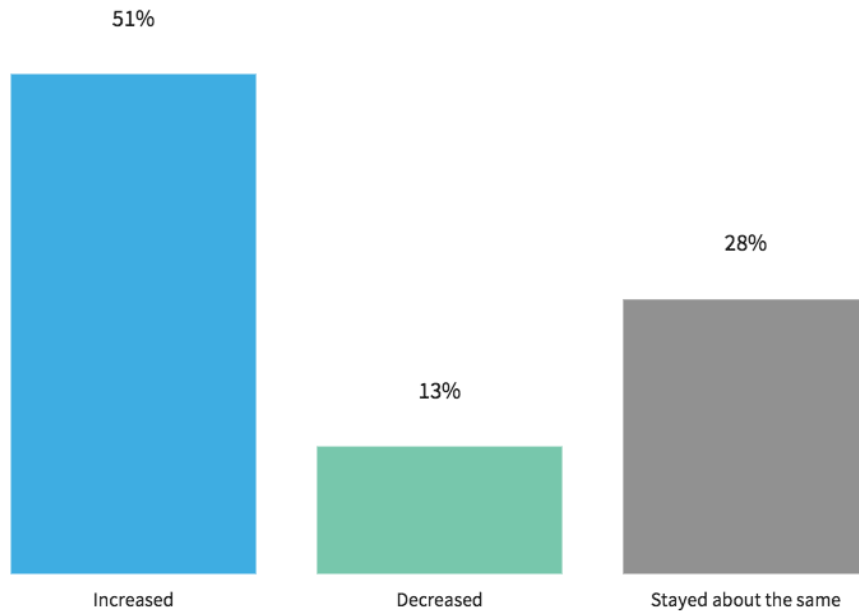


## Importance of KPIs



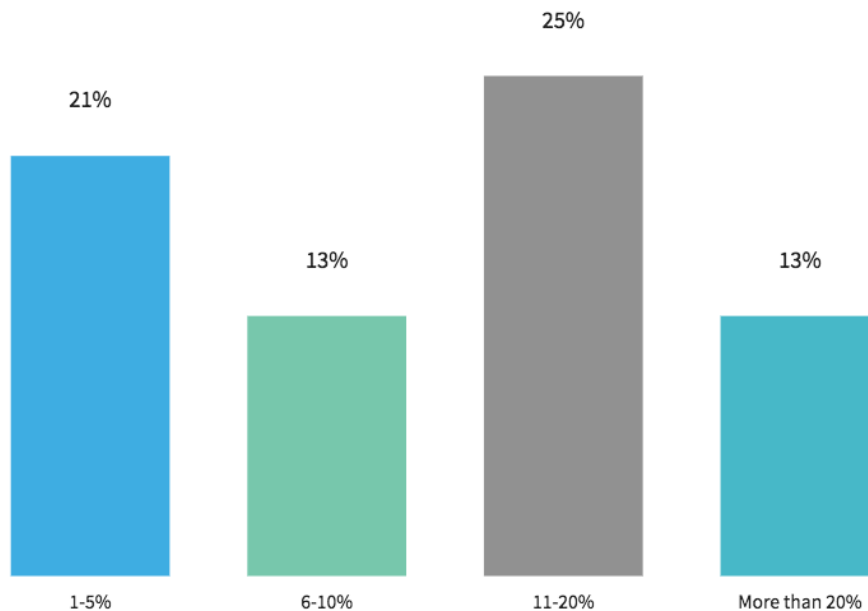
## PROFITABILITY

### Have Agency Profits Increased the Last Two Years?

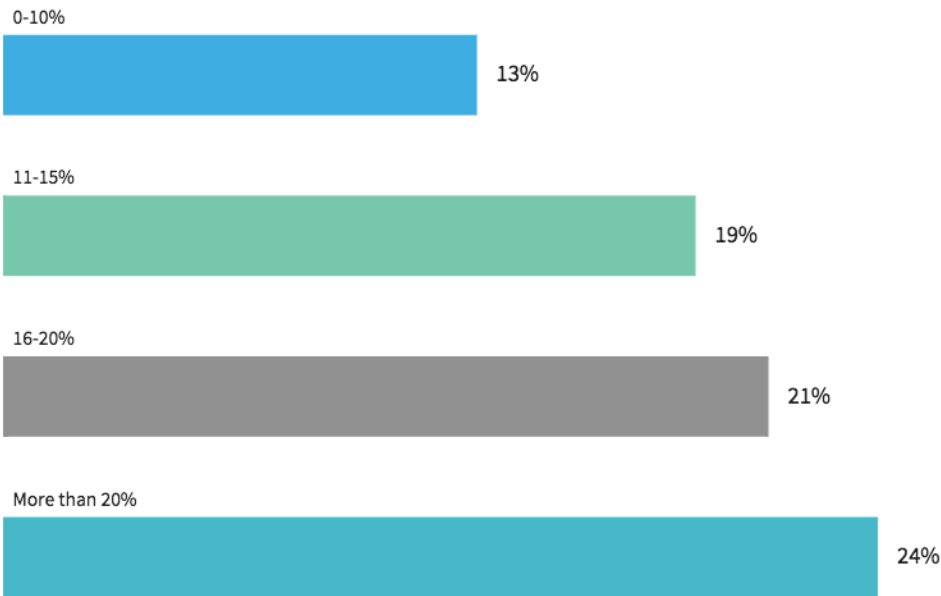


Profits are ostensibly moving in the right direction for the industry. Research revealed that nearly half of the respondents reported an overall increase in profits over the last two years, 38% claimed an increase of 11% or more, while almost 45% claimed 16% or more average profit margin per project.

### Net Profit Increase

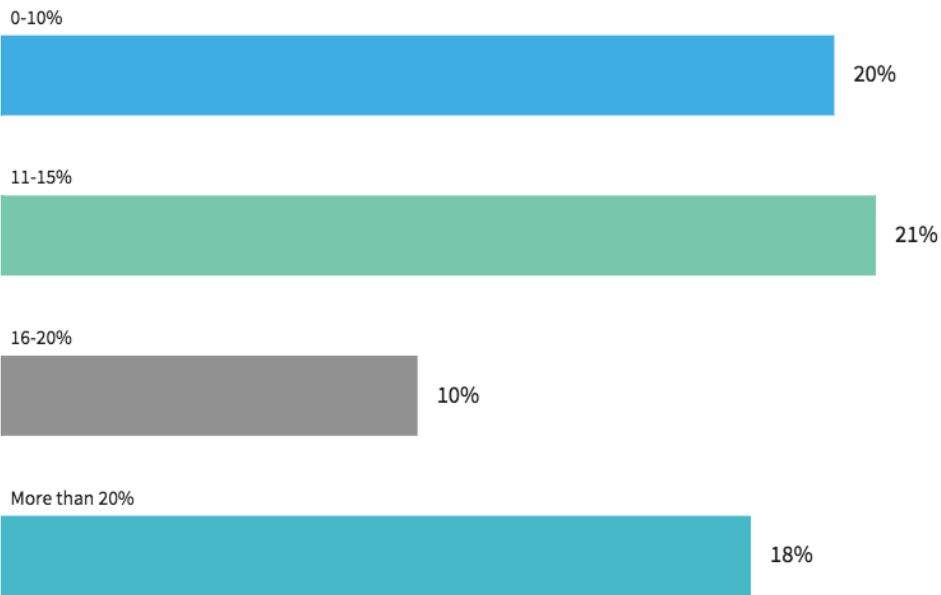


# Average Profit Margin Per Project



However, as we noted on the flip side, there is still a substantial amount of potential profit lost due to over-servicing; 49% of respondents reported 11% or more profit loss due to this particular challenge.

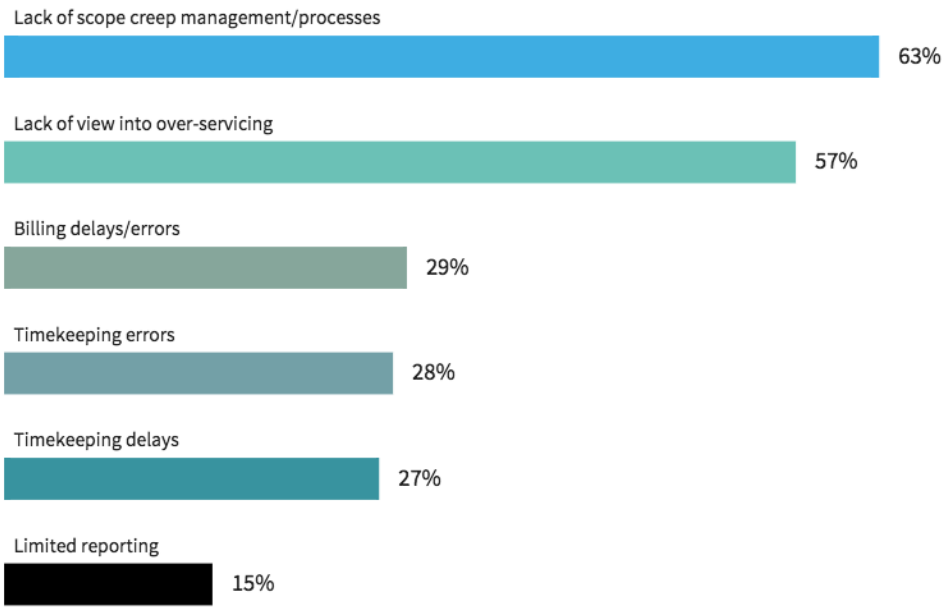
# Profit Lost to Over-Servicing or Job Overruns



The single and greatest profit-eating challenge, however, is the lack of scope creep management and processes. Sixty-three percent revealed this issue has the absolute greatest impact on their project and overall profitability- followed closely by the lack of view into over-servicing, at 57%.

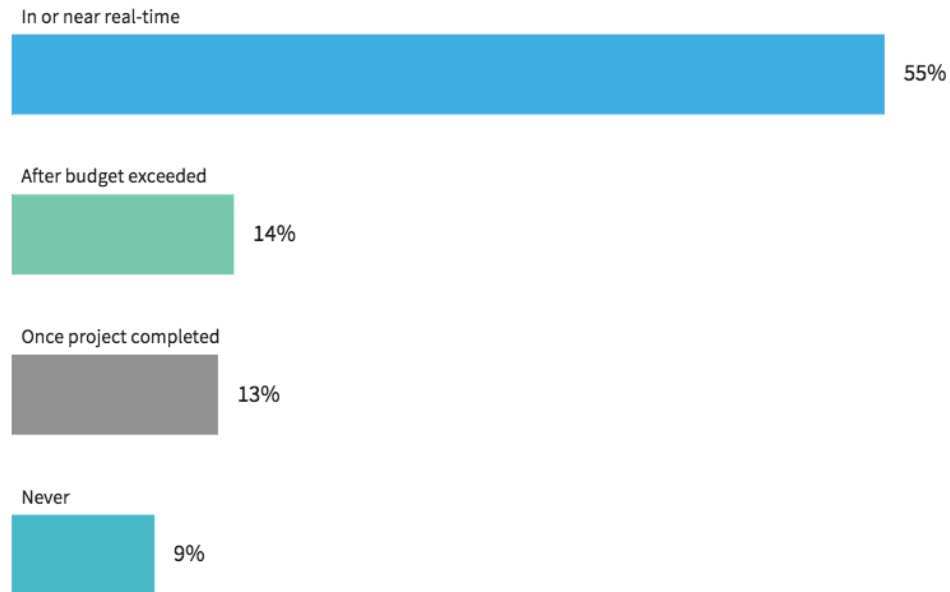
Yet, if you combine areas that are potentially easier to correct and manage more efficiently, including billing delays/errors, timekeeping errors and delays; the overall impact on profits is a staggering 82%.

## What factors most impact profit?



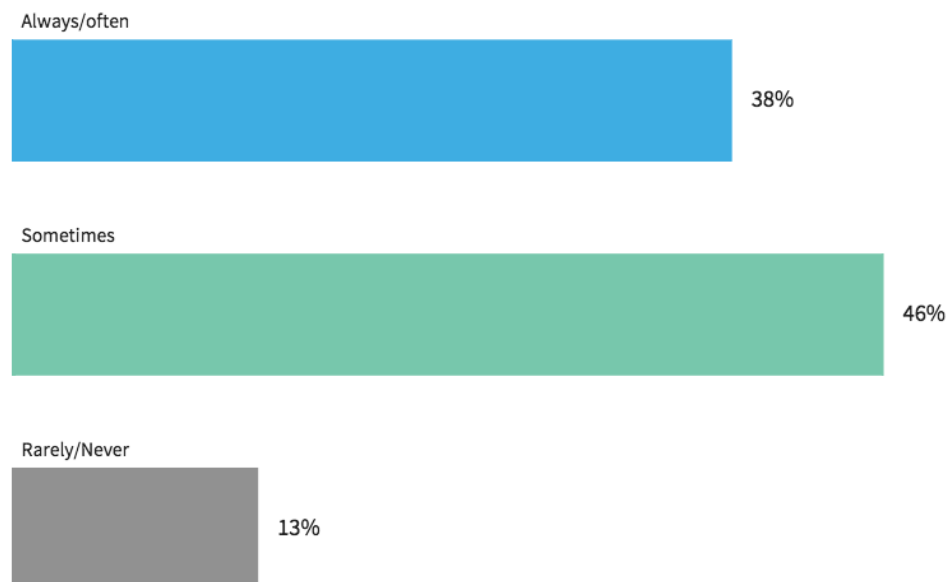
## VISIBILITY AND REPORTING

### How quickly are you notified if a project goes over budget?



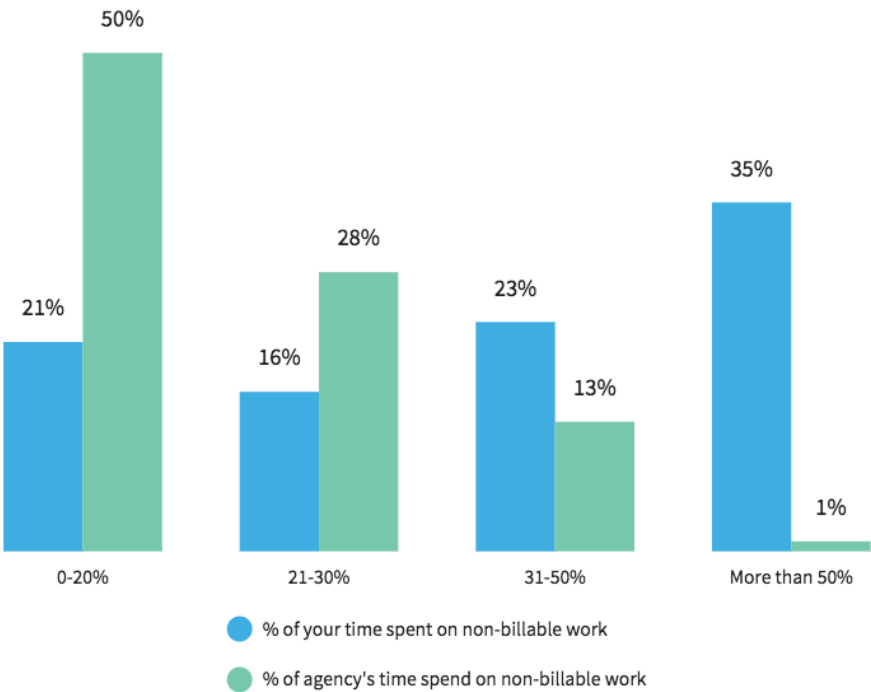
Over half of the respondents claimed notifications in or near real-time for projects going over budget. Still, an astounding 84% stated that budgets are exceeded due to scope changes, and only 29% stated that this capability contributed to recent growth.

### Exceeding Budget Because of Scope Change



One final interesting point from the survey reveals the difference between an individual's perceived percentage of time spent on non-billable work versus that of the overall agency. Fifty-eight percent of individuals claimed 31% or more of their time is absorbed on non-billable work in comparison to 14% of agencies that claimed this amount.

## Percentage of Time Spent on Non-Billable Work



# In a Nutshell, Deltek Suggests...

---

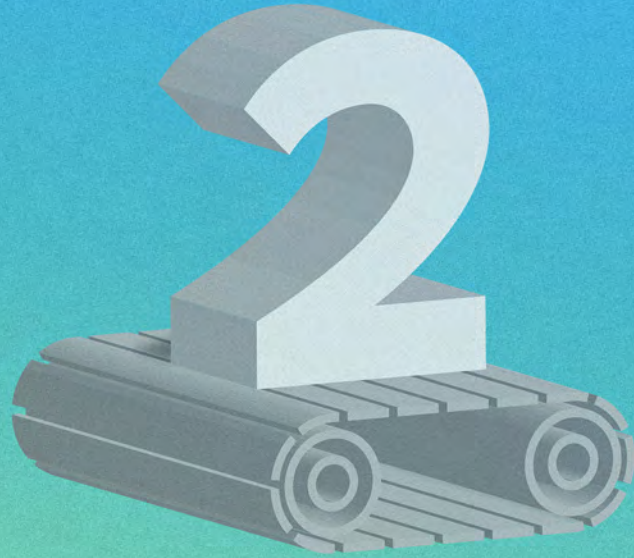
Agencies need more comprehensive workflow management solutions that unify all agency activity into a single view of people, work, time, and financial results. Currently, many agencies have islands of disconnected information that limits cross-agency visibility and management of project profitability.

Unlike collaboration tools or standalone project planners, a workflow management solution should give agencies better visibility to improve their use of resources, track and increase project profitability, eliminate the hidden costs of over-servicing clients or scope creep, and provide a clear return on investment. Agencies should expect greater benefits from the workflow management tools they are using today and/or explore more comprehensive solutions that may embody enhanced capabilities for greater success.

*In Partnership with*

**Deltek.**

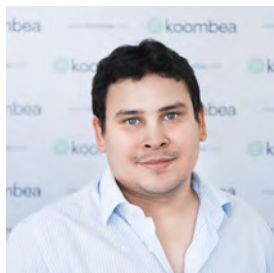
---



- 1 Process Optimization for Digital Agencies
- 2 The Iterative Workflow Environment
- 3 Letting Go of the Perfect Tool: Tips for Understanding What Works Best for Your Business
- 4 Growth and Transparency Make Good Bedfellows

*In Partnership with*

**Deltek.**



**Jose Gomez, Koombea**

## Process Optimization for Digital Agencies

---

The success of business process reengineering (BPR) in modern manufacturing companies has created demand among digital agencies that aim for better quality, predictability and higher profits. There is no question BPR works for modern manufacturing companies. Can the same be said about digital agencies? I say yes.

The workflow concept has evolved from manufacturing – where the environment was passive and the processes mostly static – to digital product companies whose products live in infinitely complex and ever-changing environments. We have been working hard to create workflow processes that guide the crafting of applications and digital media so that we can achieve consistent and measurable results.

Designing dynamic self-regulated workflows, which can reengineer each process to improve it or adapt it to changing requirements – fast-paced and consistently – is today's holy grail.

In order to achieve better results, there must be a baseline upon which to start building value. The key is visibility; this is essential to building a reliable, continuous improvement process. Sometimes you can even discover that the baseline isn't a good fit to start building value and in those cases you can decide whether it's feasible to invest in what you already have, or if it's better to start from scratch – either way – there has to be enough transparency within the metrics that are tracked.

The point is that, for a digital agency like ours, being able to measure utilization rates, as well as the efficiency of our efforts, helps us know if our processes are working or not. It's important to understand “what gets billed vs. what doesn't get billed.”

Efficiency should strive to be 100% all along, but if it's not it means that we're doing something wrong somewhere in the process. It helps us know – on a very high level – if our operations are correctly set.

So, let's check the key components that help us maintain high visibility and focus on what's really important...

## **Data Logging**

Does the quality management process remind you of something? Some agencies struggle with this concept, and it can be a headache if things go wrong. What has helped us when we want to fix quality issues is the data logged by each member of the team during key moments of the process, along with comments.

Data logged should also strive to be of high quality. In order to achieve this, we use tools that make it easy to log the information we need to build our metrics. Our toolbox includes a wide array of tools, varying from spreadsheet macros to fully featured applications.

The important part is that the overall activity log of the project is built from different roles on the team, which makes it very detailed and spreads the effort of keeping an updated log with input from many people instead of having a single person keep track of everything in a project. This makes the process traceable, and we can always find something that can be improved afterwards.

## **Communication – Clarity in our Communications**

Digital agencies that rely on remote workers are especially vulnerable to low quality processes. The distance between team members and clients can impact trust. Effective communication is key to understanding requirements, as well as expressing questions or the need for detail throughout the project lifecycle.

It's imperative to build a communication framework that avoids misunderstanding, thus maximizing ROI for clients at all times. Workflow processes can greatly help here, by establishing iterative tasks that promote good communication. Agile teams are used to holding daily meetings, retrospectives and planning per iteration. Backing up those meetings with note taking can be very useful as valuable spoken information is often quickly forgotten or misunderstood.

Clearly defined roles and responsibilities build gateways to make communication as fluent as possible during the process. We don't want to overwhelm our clients' inbox/slack with repeated messages. The process should help identify those responsible for communication tasks.

## **Data Consolidation and Analysis**

With the vast amount of data that can be collected from a team, you should plan to consolidate, analyze and store it. Simple tools, such as spreadsheets, are good building blocks for record keeping, since they offer an almost perfect sandbox environment for analyzing data sets.

We started by using spreadsheets to log each person's activity in order to analyze how much potential work we could complete throughout a week or even the ability to allocate teams. Then we would write down this information to present to the CEO. Over time though, this workflow became unsustainable and the necessity for a specialized tool came about.

Nowadays we have our home-brewed time-tracking system – Dashable – that helps us pull activities from the project management tools, and clients can see what is actually being worked on within a specific time frame or on a particular day. Most importantly,

we are able to easily generate and digest data reports that allow us to make better decisions about how to structure our teams and allocate their most valuable asset.

### **Feedback on Time**

Talking to clients is very important. We get valuable information, such as answering doubts about requirements or discovering new requirements. Clients often have good ideas or preferences regarding how their project is run, and we like to hear all of them. A powerful process makes it easy to track improvement proposals and provides a framework to update processes.

### **The Outcome**

With a good process in place, value flows seamlessly from the client through the team – and vice versa – we're able to do it by following simple rules. This leads to less time spent coaching and more time dedicated to working on the business on a remarkable level and searching for improvement opportunities.

Project managers have more time to improve customer relationships and get better requirements. Developers do not find themselves wandering around e-mails and Slack messages searching for next steps – they can dedicate more time to developing better quality features – and to making the client happier.

Architects, designers, and the rest of the team, will all have a structured workflow that leaves enough time for their own improvement.

Crafting a cycle to make your business go further with real time, trackable workflow might be a high investment in time and effort but the payoff is well worth it. As more companies shift towards a structured process-based workflow, the necessity of tools to help manage workflows emerges and we should do something about it.

***About the Author:** Jose serves as the Operations Leader for digital agency Koombea. He possesses over seven years of tech industry experience in areas ranging from development to strategic direction, including architecture and project management. His background is industrial engineering and he's currently researching ways to improve software development processes.*

*In Partnership with*

**Deltek**

---



**Michael Polivka and Mike Au, Juxt**

## The Iterative Workflow Environment

---



Nestled deeply within vision and mission, somewhere in the realms between strategy and the day-to-day workings of the business, is the agency's heart. It pumps on operational effectiveness and efficiencies.

As managers and leads, we know the lifeblood of our businesses rely on having amazing employees represent the services we offer. We also need to ensure they are optimally utilized, with the ultimate goal of generating more money coming in than going out.

### **The Toolkit**

Much can be accomplished in our agencies without process. But tools and processes make the things we do better – and allow them to happen more quickly – which is critical for running a business. As Jesse Fulton, our Director of Technology, constantly reminds us, we need to “work smarter, not harder.”

Some tools we adopted because of prevalent usage (Office, Google Docs, etc.). Some came after research, demos, and phone calls (particularly Celoxis, which we'll soon discuss); the remaining tools were mandated by our team (Slack, Trello, etc.).

Because JUXT is a division of Project: WorldWide, we must use corporate tools for functions including timesheets (Oracle's JD Edwards) and analytics (IBM's Cognos).

### **The Centerpiece**

We considered Workamajig, Basecamp, and the like, but landed with the lesser-known Celoxis. While not a silver bullet, it aligned best, filling the gap for an inexpensive resource and project management tool.

No, Celoxis isn't a topical cream. It's SaaS, a web-based platform allowing multiple producers to manage multiple projects, across many resources. It shows real-time resource allocation and availability, short- and long-term. It serves as our hub for all interconnected estimating, tracking, resource and project management, and pipeline forecasting.

It's great! However, Celoxis is no panacea. Many tools are similar, but we chose it due to familiarity with the way it works, as well as customization and support, then invested time crafting it around our needs (not the other way around).

### **Business Optimization**

We then use reports to keep our agency running smoothly. For example, we can compare how many designers we have versus how many were needed over the past few months versus the forecast through the end of the year, all to influence our resource plan.

We can see profitability reports per department for any given week, month, and year, which provides meaningful data to influence decision-making around growth or pruning service offerings. Are we top heavy? Bottom heavy? Does our rate card work against our per-employee operating cost? The data is there and can be used in a variety of ways.

**This might seem quite similar to iterative development, and that's because it is.** JUXT is a learning organization. At almost every milestone there's optimization of the tools and the team that uses them, which improves the nature of how and what we do for our clients while being true to our brand.

***About the Authors:** Michael Polivka is a business leader and transformation specialist with a focus on human interaction, awareness, design, and technology. He is the Principal of Strategic Operations at JUXT, a San Francisco based creative innovation agency and member of SoDA.*

*Mike Au oversees JUXT's production department and leads the team of producers from concept to launch. He has more than 16 years experience leading design and production teams in North America and Asia. Mike focuses on managing projects and timelines in a way that creates incredible success stories and client satisfaction.*

In Partnership with

**Deltek.**

---



## Alicia Bergin, Method

# Letting Go of the Perfect Tool: Tips for Understanding What Works Best for Your Business

---

In June 2015, Method kicked off a new portal development initiative (working title - “Not an Intranet”). In true agency form, this initiative is becoming an annual event to address pain points associated with working in a design-centered consulting environment. 2015’s theme is collaboration, knowledge sharing, and community building across a distributed network of offices.

Our organization is littered with experiments: a home-grown time tracking tool, three separate blogs, a cloud-based case study tagging tool, a wiki-based intranet, a “pretty” intranet, five websites (and counting), inspirational screensavers, and vacation and resourcing trackers, to name a few. The majority have stalled in the design process due to lack of interest and time, or have quietly been retired and faded into the background.

It’s clear that, as designers, to reinvent is our nature, often to the detriment of actually solving a real problem. What have we learned in the process?

### **1. Treat internal projects like client projects.**

This should be obvious, but is it? We’ve adopted a policy that requires a signed Statement of Work and approved schedule/resourcing plan for any initiative that requires a significant investment of time. This includes designing new tools, as well as research and procurement of existing tools on the market. It’s formal and often annoying to the team, but has proven invaluable to focus the effort and ensure the team has a shared understanding of success. A critical component is assigning a “client” internally - one or two at most. We’ve all seen this - what sinks a project faster than a large stakeholder team without an identified decision maker? The Creative Director of the project cannot be the client, nor can multiple designers operating in a client capacity have an equal voice in the project.

### **2. Understand subjective vs. databased decision-making.**

Early in my career I developed a decision matrix for determining the relative “worth” of a business development opportunity, considering alignment with our services,

resourcing capacity, health of the pipeline, and relative appeal to our staff. Every project received a “go/no go” rating, aimed at managing workload and our business overall. Did it work? No. The system assumed the data was static. A better solution was a mechanism for surfacing the known data and exploring how we could adapt the pursuit to suit it. We’re too busy for the next month? Perhaps the client will consider a later start date. The project feels too tactical, not aligned with our aspirations? Have we spent enough time with the client to truly understand their needs, and can the project be shaped to solve bigger, perhaps unstated problems?

### **3. Garbage in, garbage out.**

There are many beautiful purpose-built tools, but they inevitably fail without dedicated stewardship. Without data - the data of your business, in all its forms - tools cannot provide the information required to make good decisions. A more important question to ask is, “What do I need, and why? What is the data that supports that need, and how can I get it in the least labor-intensive way possible?” Even more important - don’t measure that which you don’t need to. Time Tracking is the perpetual example - be clear why you track time and why it matters, and if you have a better solution for addressing that business need, use that instead.

### **4. Separate the business of managing your team from managing your business.**

We’ve spent countless hours searching for the perfect tool that does “everything,” in exactly the way we do “everything” today. There are certainly nuances to the type of business we run, but it’s not entirely unique. There are good tools available for financial reporting, payroll, taxes, benefits, P&L management and the like. Being “different” isn’t a virtue in these areas. Choose a platform appropriate to your scale of business and operational team capacity. Consider how your team management tools integrate into common best practices from an accounting perspective, not the reverse. Clearly establish policies for revenue recognition, cash flow management, and forecasting upcoming business. Ensure your team (everyone) is clear on the difference and understands how their actions and behaviors impact each category.

I welcome the arrival of the “tool to rule the world.” For the time being, our most valuable insights and results have come from clarity around needs, clear accountability and process, and a commitment to data integrity.

***About the Author:** As Managing Director of Method’s San Francisco studio, Alicia is passionate about driving brand relationships through great product and service experiences. She works closely with creative teams to ensure productive client relationships, and plays an active role in career development, recruiting, business development and management of the office overall. Before rejoining Method in her current role, Alicia was Director of Business Development at frog design, working with companies such as PwC, JPMorgan Chase & Co., Google, Sony, Cummins, and Westfield.*

In Partnership with

**Delte**tek.

---



**Brian Walker and Eamon Wyse, Grow**

## Growth and Transparency Make Good Bedfellows

---

Every successful agency faces a double-edged sword around growth. Larger clients and project opportunities offer larger budgets, but tend to create a knee-jerk response where new challenges are matched with new infrastructure.

This is the point where trouble spots in agency workflow may come up: communication gaps, resource conflicts, and overly complex processes. The following are a few ways that leaning in on transparency can help create a more virtuous cycle, where teams feel rewarded for their ambition rather than associating big projects with big problems.

Detailed and candid project reviews are a key first step –start now if you’re not doing them. If you stopped project reviews because they weren’t producing useful feedback, consider how much of the team’s input resulted in meaningful change. Poor follow-up from agency leadership has a chilling effect on how much candid feedback you receive when asking, “What didn’t go well?”

Shifting from fixed-fee projects to time-and-materials creates a more collaborative relationship with clients, giving them better and more consistent views across projects on a daily and weekly basis. This can be intimidating at first from an agency perspective, but regular reporting and synced meetings pay off quickly with more client trust, and a deeper understanding of the work on both sides.

Better reporting isn’t possible without refined and automated data collection tools, giving you more accuracy around how time is being spent on a project. This data also lets you track projects more closely and gives clients real insight into the outcome of a change request or a change in scope –from both a time and cost perspective. Just be sure you don’t become so introspective that you ignore clients, and don’t overwhelm them with data. Show employees how greater awareness of utilization can minimize crunch time, so they understand how more detailed tracking benefits them.

*In Partnership with*

**Deltek**

Ask for input from clients, and share your insights on process issues candidly with them. Some of your most helpful feedback will come from clients, and transparency serves as a reminder that clients and agencies want exactly the same thing: a smoothly run and profitable project. Solving for client goals like deeper reporting and more progressive workflow helps you address internal feedback you'll hear in project reviews during periods of growth.

We still consider ourselves early into the journey, but already see that small workflow changes can greatly improve efficiency and client relationships. As all agencies strive to create processes that support more ambitious work, it's easy to forget that the best processes are flexible. Needs change and we have to regularly make time to step back, take an honest assessment, and change course to improve how we work. Doing this ensures we're on the right path to continued success and growth, both in the eyes of our team and our clients.

**About the Authors:** *Brian currently serves as Tech Director for Grow, where he is responsible for managing development staff and providing technology leadership as a member of the agency's management team.*

*An award-winning Production Director with over 27 years of technology, advertising and screenwriting experience, Eamon joined Grow in 2014 to lead the agency's producer team.*

In Partnership with

**Deltek**

---

