# New agency

**A practical guide on how to onboard new agency operations to set up the most successful relationships, and flourish within your marketing ecosystem. Relevant for all clients, models and disciplines. If you have any questions or want more information about your specific needs, please contact the AAR team.**

## 1 Be crystal clear on the remit and role of the agency within your marketing ecosystem

Make sure this is communicated before the agency starts and repeated often to drive clarity and ensure all questions are answered. Call out what the agency will NOT do as part of their scope of work, or it won't be an immediate priority. This is crucial to ensure colleagues, internal teams and external partners fully understand and can start off on the right foot. Misunderstandings and assumptions once settled can prove difficult to shift, particularly if there was a 'similar' incumbent. Establish a clear means to manage out-of-scope requests and empower the agency to flag and say no to non-value adding requests.

## 2 Bring everyone on the journey with a 'visual' road map that shows the high-level expectations for the next 12 to18 months

Bring alive now, next and future in tangible terms. Ideally this should have some specific milestones for the shorter term, as well as the intent for the first 12 to 18 months. Consider the phasing and needs along the way – inputs – and focus on the outputs and outcomes. Make it come alive for marketing, and easy to relate to for other functions within the business. Don't over promise. State how updates will be given and make sure these aren't forgotten in the 'busy-ness' of commercial life.

## Setting up for success: New agency

### 3 Be clear what has changed and is the new norm

Use the opportunity to state the ambition for the new direction and intent by communicating why the change was needed, the criteria for success and, therefore, why this agency won. Be specific about how this will impact the client teams, even if there are hard messages about major changes that will take time to embed. For work that was previously undertaken by the exiting agency, make it clear what will be done by another agency, what will be switched to an in-house team and what work will be stopped in totality. Agree and define an amnesty period for live projects working to typical turnaround times.

### 4 Share the 'people' headlines - a summary bio and photo - for the new agency team

Focus on the core team, not everyone who will touch the account. Prioritise. Be clear on who is the 'go to' person for what projects and which teams internally they will predominantly be working with in the first few weeks and months. Explain likely over-indexing on senior involvement in the early days while the team is built, and gaps in the team are resourced or recruited. Deliver a similar headline story to the new agency on the 'core' client team.

Share similar headlines with the other agencies on your roster and all other key functions around the business so you fast-track the 'getting to know you' stage and can move more quickly into 'doing'.

### 5 Invite all to a virtual 'meet and greet' session to hear about the agency's background, summary creds, their experience, their values and maybe even their pitch

Run a similar session with your other agency and tech partners – do intros, remit, changes, platform, collaboration principles and address any immediate questions. Give clarity and focus throughout - and work pragmatically through challenges. Ensure visible senior sponsorship at all sessions and allow the day to day leads to talk about expected challenges, niggles and problems. Progress not perfection is a crucial onboarding message. You will need iterative solutions from all perspectives, so start sharing that message right from the start.

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## 6 Define and explain the construct of the commercial relationship

The model, the fee shape, renumeration model, management, and tracking. Link the commercial construct to scope and KPI's so there is complete transparency. Ensure you share the key points and, crucially, what is different with all who will work with the agency – preferably before they start. Ensure the new agency is set up on your financial process as a matter of priority – the brilliant basics plan! Ensure you undertake a first relationship assessment around 6 months in. Specifically, to review performance vs the pitch ask and expectations. This must be mutual, or begs the question why bother as you're only getting half the story. And must be bespoke, considering your road map, your achievements, your learnings, and your marketing challenges. It must always be commercially useful with future facing recommendations. #AARHealthCheck

## 7 Be ruthless and set the right phasing for introductions and immersion session

Set the scene in terms of what needs a general introduction and what needs a deep dive. Align this with the priority projects the agency will be working on and, therefore, what depth of knowledge and data is essential. Focus on what matters most. Don't try and do everything. Agree the 'how' for getting up to speed – considering different means – share and read, watch and shadow, walk through and discuss, pick up as go along etc. Map out timings and make it mutual. Refer to the plan regularly and refine. Watch out for overload and the new agency being overwhelmed, which will only drive inefficiency and the need to repeat.

## 8 Talk about the HOW as much as the WHAT

Make this a clear focus in the first 10, 30 and 100 days. Agree crucial territories and meeting cadence and rhythm for the first few days and weeks. Learn from the last time, assuming not too long ago. Invite perspective from other agencies of what worked well or, with hindsight, would have helped in setting up for success. Agree the territories that are important for success. Be clear on 'turnaround' time frames for planning, media buying and production. Some things are in the agency's gift to flex, others are led by the market and media owners with less room for debate. Don't fall down the rabbit hole of building specific SLA's for every aspect of your relationship at this stage, or standard cookie cutter templates. You don't know the reality, and what 'mutually' to focus on yet.

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### 9 Create a brilliant basics hit list - so the little things don't trip you up later or cause niggles that will undermine early successes

Establish a clear wash up journey and path that invites early celebration of the wins and road map, and learnings with an open and non-blame approach. Agree and launch a weekly embed temperature check tracker for all to use and means of review, early sight of amber and red flags. We can help you with this if a new tool to consider.

### 10 Establish the stage and make it easy for your new agency to add value

More and more clients are asking their agencies to demonstrate innovation or prove value-add, and yet 'what' and 'how' is very loosely defined. As part of onboarding, ensure you articulate your appetite and that specific areas of interest are identified to enable your new agency to efficiently focus resources, and succeed together. Be aware this will look very different across different agency disciplines. For example, in media, 'value' is often translated in media savings which is often built into PRF agreements or similar. Meanwhile innovation often means creative and innovative media activation, rather than traditional spots and weights. Language and preciseness matters if your agency is going to succeed against this increasingly common ask.

## Want to learn more?

**Be sure to download the full 'Setting up for success' series including onboarding checklists for the first 10, 30 and 100 days of a new agency relationship.**

**To chat with us about your specific needs, please drop Vicky an email on vgillan@aargroup.co.uk**

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