



Giving Teeth to Agency Evaluations

How to build an action plan that breathes value, trust, and longevity into the client–agency relationship.

It's a story as old as time: The client agency management or procurement team fields an annual evaluation of its agency partners.

Marketers and agency teams invest time into providing feedback. The data rolls in. A lengthy presentation is assembled with scores and qualitative feedback — but it is only maybe shared by email without discussion. If compensation is tied to scores, the finance team gets a copy. That presentation deck, and all the data and insight contained within, is doomed to sit in a folder until the process is repeated the following year.

If the relationship is good, not a big deal, right? If the relationship is bad, it won't be long before the marketers are clamoring to replace the agency. But what if good could become great? What if measured and thoughtful action could shift the dynamic of a troubled relationship and the time spent finding, engaging, on-boarding, and acclimating a new agency could be avoided? Action planning can help redirect those efforts toward building great partnerships for the long term.



Action planning is a key element missing from many agency management processes. Top-to-top meetings should focus on addressing the issues that get in the way of the work, but according to a 2019 survey conducted by the World Federation of Advertisers and Decideware titled “Client-Agency Performance Evaluations: The Agency View,” only 31 percent of agency respondents said clients conduct face-to-face discussions around the results of performance evaluations. What’s more, not all of those discussions include a written plan with timing, a responsibility matrix, or other elements to create accountability.

An Effort Worth the Outcome

Why aren't clients making this a consistent element in their agency management strategy? Most likely, the reason has to do with the fact that creating an effective action plan takes a focused effort.

A good action plan involves the following elements:

- **Evaluation.** Gathering feedback and data that provide visibility into the health of the relationship
- **Interpretation.** Analyzing the feedback to determine what is getting in the way of the work
- **Leadership.** Stepping up to drive the process, engaging stakeholders, and ensuring results
- **Hard conversations.** Identifying problems and exploring contentious issues that often exist within the client's organization
- **Buy-in.** Aligning perspectives on how to address the issues and drive mutually beneficial outcomes
- **Commitment.** Ensuring team accountability for change and enlisting leadership support when necessary
- **Follow-up.** Checking in to drive adherence and monitor progress



That effort can be intimidating for agency management teams already strapped for time or challenged to do more with less, but it does not compare to the alternative. When action planning is not part of the process, frustrations turn into dissatisfaction, fired agencies, and the need to source new partners, which is stressful, demoralizing, and drawn out. The time to find and transition to a new agency can take six to 18 months. The hours and energy invested in that process can translate into lost momentum in the market and missed business goals. Both clients and agencies would be better served by investing in a plan to keep their partnerships healthy and on track.

Building a Solid Action Plan

While a strong action plan is informed by a solid evaluation process — one that lays out key relationship objectives for the agency, ensures those objectives are measurable, and gives assessors the insights and data they need to bring their feedback to life — it cannot amount to a collection of scores and comments. It requires focus and a hard look inward, and it must be, as the name implies, a plan of action.

Here are several considerations client agency management teams should make when developing an action plan:

- 01 Identify the themes.** In the evaluation process, are there consistent or reoccurring pieces of feedback? What areas scored the highest and lowest? Where does the partnership get stuck? Are any of these issues interrelated? These elements paint the picture of the relationship's health.
- 02 Focus on key issues.** Once the themes are set, identify three to five obstacles that get in the way of great work or, conversely, strengths that elevate the work. Building on these strengths is as much part of action planning as mitigating challenges. If these issues were addressed, what would the relationship look like?
- 03 Define an actionable plan.** Whether it is building on strengths or removing roadblocks, how will the team make change? While it is important to lay out the tactics, specifics also should be defined, including who will be accountable, when the action will take place, and what success looks like.
- 04 Ensure alignment.** Often the relationship manager (who most likely comes from agency ops, sourcing, or marketing) drafts the plan. Building alignment across the client and agency stakeholders usually takes a conversation or two before fine tuning the plan's actions and accountabilities in meetings with the agency and client working teams. It is important that everyone agrees the plan will make a difference and that both sides have a vested interest in delivering on the plan.
- 05 Gain leadership support.** As part of a top-to-top meeting or quarterly business review, the agency relationship manager and working team will present the plan to leadership, especially if the plan entails some investment of money, time, or resources. Ensuring that there is ongoing accountability and a set point at which progress will be reported is a key element to an effective plan.

To be clear, action planning is not a corrective action. An agency that is inherently flawed or failed to respond to previous feedback needs short-term direction with significant consequences defined. Action planning is meant to nurture the agency relationships that are worth growing and, if done right, can facilitate constructive dialog that builds lasting, rewarding partnerships.



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