



## CASE STUDY

# Ford's Journey in Automating their Agency Management Process for Scopes of Work and Performance Evaluations

Organizational Success to Achieve Informed Marketing Investment Strategy

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## Introduction

Ford's Marketing and Sales, Global Agency Management Team (GAMT) is responsible for managing agency of record relationships including, but not limited to, processes for scopes of work (SOW) and performance evaluations globally across all divisions. GAMT manages over 450 fee-based SOWs annually working with 4 Global and 3 US advertising agencies of record. Additionally, Ford conducts around 650 agency performance evaluations twice a year. Nearly 60% of the evaluation participants represent the agencies and 40% are Ford participants.



## Challenge

GAMT managed a global, standardized process manually prior to 2020 via Excel spreadsheets, emails, and many meetings. An alternative process was needed in order to develop a global database to house the information that would allow GAMT to establish a mechanized system for managing SOWs, performance evaluations and executive reporting.

Timing was aggressive – the timeline was driven by the desire to conduct mid-year performance evaluations in June, 2020. Once the evaluation module was implemented, the team would shift their focus to the SOW implementation. This included completing training, User Acceptance Testing (UAT) and other key milestones. The complexity was high based on the number of agencies, business owners, purchasing stakeholders and finance stakeholders who would require access. Additional complexity came into play with establishing user rights within the system e.g. read-only vs. editor and user roles including administrator roles. The global solution would become the single source of truth.

## Solution

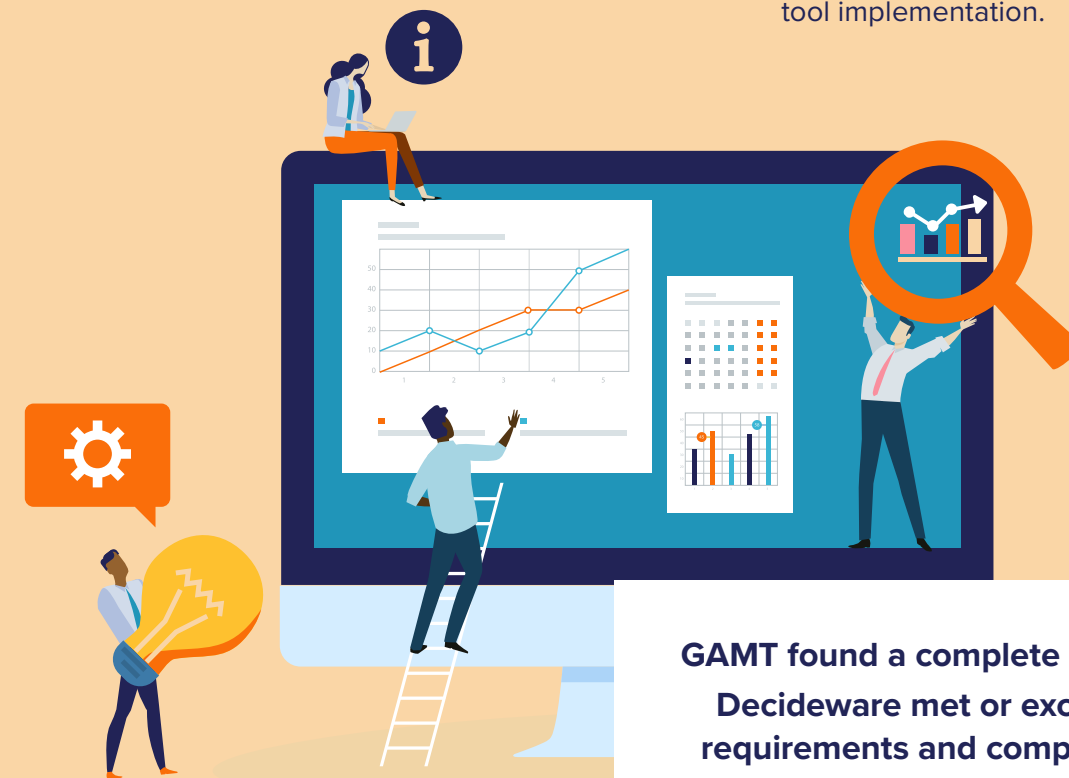
The automated solution needed to meet all of GAMT's requirements:

### Scoping Tool Requirements:

- ✓ Establish a global database of SOW deliverables, priorities, labor rates, titles, mix across all agencies for reporting on resource utilization, competitiveness, overall cost to budget.
- ✓ Give GAMT the ability to roll up total agency cost regionally and globally.
- ✓ Reporting function in USD and local currency to enable agency resource studies at the scope, regional, and global levels.
- ✓ A single point of contact from the software company, provided to GAMT, to oversee the set up and tool implementation.
- ✓ Provide the ability to track status and workflow accountability.

### Evaluation Tool Requirements:

- ✓ Conduct 360 feedback.
- ✓ A consistent way to conduct both the Agency Self-Evaluations (100+) and the Client Evaluations (100+) for 4 global and 3 US agencies of record.
- ✓ Agency evaluation of the Client.
- ✓ Reporting capabilities that can reflect both the granularity of local level detail, and the consolidation of data to support executive level reporting showcasing regional and divisional results.
- ✓ Ability to capture both numerical assessments and written feedback for each evaluation.
- ✓ A single point of contact from software company provided to GAMT for set up and tool implementation.



**GAMT found a complete solution in Decideware. Decideware met or exceeded all of the project requirements and complied with Ford's Service Level Expectations.**

# Implementation

The timeline from project kick-off with Decideware to the final phase of implementation was about eleven months and included the following:

1. January project kick-off
2. User acceptance testing that included 10 sets of UAT (1 week) performed by 6 people and included the following:

SOW Testing	Evaluation Testing
Confidential Rates For Agency Users	Testing Overall
Overall Testing	Ford On Agency
Testing With IT Updates	Agency On Agency
Testing Algorithm For Multiplier	FDAF (Dealer Association)
Adding Users/Roles/Functions, etc.	Adding Users/Roles/Functions, etc.
	360 Degree

3. 184 IT Project tasks were identified, 174 closed and 10 carried over to post implementation
4. 29 training sessions performed globally:

SOW Training Sessions	Evaluation Training Sessions
Agency / Decideware Deep Dive (3)	Agency Performance (3)
IT Training (1)	Mid-Year Agency Evaluation (2)
Kick-Off Training (3)	MarCom & FDAF (6)
Administration (Internal) (3)	End of Year Performance and Client 360 (Ford & Agency) (4)
	Performance Evaluation 360 degree (4)

5. Performance Evaluations Go Live in July (ON TIME)
6. SOW Go Live in October (ON TIME)

Nearly 650 Agency and Ford users have been trained and are using the Decideware software.

# Keys to a Successful Implementation

Key characteristics displayed by the Ford GAMT team during the software implementation:

- Leadership – guidance on processes and strong vision with cross-functional team.
- Cultivate relationships – strong trust with agencies as a partner established over the years.
- Focused working team; single “voice” of client.
- Dedicated person with IT and Marketing background and a team of experienced Agency Relationship Managers.
- Culture – willingness to change and evolve.

“The Ford GAMT team has been a dream to work with, providing a wonderful mix of discipline and innovation. They are clear on their processes and content, but without being dogmatic. Indeed, they are always asking us what we can bring to the mix and adopting new ideas that improve their outcomes. Importantly, they take project management seriously, having a dedicated person take point on the implementation team - this is a game changer. And finally, they provide clear direction to their agency partners, working in a transparent way that seeks to look for win-win opportunities for both the marketer and the agency.”

Richard Benyon, CEO Decideware, Inc.



## Results

**Efficiency** – Instituted a change in the approval process allowing GAMT to track scope velocity from submission to completion. This visibility helped shorten the time from submission to approval.

**Complexity** – Complex processes were able to be accommodated in Decideware’s automated platform with training and collaboration across global organizations (Ford and Dealer), agencies, IT, Purchasing, Finance & Management. The platform provided the ability to track change requests and sign offs for approvals.

**Training** – Emulated the way GAMT does training globally and added Subject Matter Expertise from Decideware to enhance the training, videos, etc.

**Transformation** – Within 11 months GAMT transformed their agency management program - fully automating their SOW and evaluation process globally. No more relying on spreadsheets and spending weeks trying to consolidate agency related data.

## Benefits

- Globally met SOW deadlines for the first time ever.
- Business Intelligence is being used to validate data accuracy.
- Dashboards are being used to look at Year-Over-Year comparisons and trends to allow for better decision making.
- Ease of use is allowing for more users to embrace the tool.
- PE Functionality for regional roll-up of the evaluation(s).
- Going into 2022 GAMT will leverage the lessons learned and Business Intelligence to do further analysis of the process and trends.



## Decideware Tools Provide:

SCOPING	PERFORMANCE EVALUATION
Ability to deploy globally across all Ford and Authorized Agencies	Ability to deploy globally across all Ford and Global agencies being evaluated
Repository for keeping all SOW's	Unlimited evaluations for authorized agencies
Alignment to FLOW process; Plan, Create, Learn	Agency self-assessment and reverse score cards (360 options)
Rate card information	Ease of use to customize survey percentages and questions for a specific evaluation
Ability to track Year-Over-Year trends to analyze data	Create custom dashboards with Business Intelligence
Create custom dashboards with Business Intelligence	
Ability to track status and workflow accountability	

## Post Implementation Best Practice Recommendations:

### Perform Post Implementation Assessment:

After the software implementation was complete, GAMT and Decideware conducted a post mortem, intended to inform process improvements and promote iterative best practices.

Agencies were also an integral part of this process since they are a key stakeholder in the SOW and Performance Evaluation processes.

All recommendations from Ford GAMT and agencies were reviewed with the product development team to inform current and future product enhancements.

### Additionally, Ford sought feedback from industry peers on what to consider post implementation:

- When expanding to additional software modules, where possible, keep team consistency to leverage their knowledge and shorten implementation timelines.
- For ongoing use of existing modules:
  1. Keep close contact with stakeholders.
  2. Document processes, trainings, etc.

Overall, the collaborative spirit and desire to continuously innovate drove a successful software implementation where all stakeholders benefited. With robust Business Intelligence, the GAMT team will be an integral contributor to inform marketing investment strategies.

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