



The First 90 Days: 8 Tips for On-Boarding an Agency

So you've just hired a new agency partner ... time to delegate a few projects and switch to cruise control, right? Not so fast.

The first 90 days are critical to developing a true client/agency relationship (fully vested, productive and rewarding) versus a client/agency transaction (mere task completion without ownership, strategy or connection). You're 50 percent of that equation, so it is important that you and your team are hyper-engaged in the agency on-boarding process by investing in the following eight areas:

Finalize goals and objectives

Lots of potential big ideas are thrown around during the proposal process, but most won't stick. Once you've selected an agency partner, it's time to finalize the real goals, objectives and expected deliverables. In turn, your agency should develop a strategic plan for generating such results.

Work off a real budget

The big ideas referred to in #1 likely came with big budget estimates. Agencies can dream, right? Now that you know what you need, work with your agency to collectively set a true budget framework. With that, make sure your agency communicates its billing philosophy, billing cycle and invoice structure. No surprises!

Define roles

Who is the agency's main contact at your company? Who else from your team needs to be in the loop? Likewise, who leads your account at the agency and who is in support? Are roles clearly defined so there's never an overlooked meeting invite, a missed approval or an out-of-office panic?

Schedule meetings and tours

It's hard to have a relationship with people you've never met. Introduce your team to the agency over a casual lunch or an office tour. Also, most agencies love to get behind the scenes – let them see the manufacturing facility or attend a sales meeting. They'll gain a better appreciation for your business.

Hand over everything

Agency on-boarding makes for a good time to clean off your desk. You've signed that non-disclosure agreement, right? Collateral materials, presentations, samples, swag – any eager agency will see this as a present wrapped up with a big red bow.

Set aside time to communicate

Your agency knows you are super busy. Yet, as they dive into strategy development, they'll need insights only you can provide to move the project forward. Set aside time for answering agency questions and, for at least the first few weeks, schedule weekly updates. Don't worry – the deeper the agency engages, the more self-sufficient they'll become.

Create a reporting system

Before the work starts, establish a mutually-agreed upon reporting system. What format and frequency works best for you? How can the agency help you demonstrate results to your internal team?

Evaluate and improve

During the on-boarding phase, address with your agency what's working and what needs to improve. Your agency will thank you. You know what else goes a long way? Ask your agency for feedback as well. Reciprocal communication is everything!