Account Staffing SOP

Document Purpose: The purpose of this Account Staffing Process Document is to provide a clear, detailed guide that outlines the procedures, roles, responsibilities, and timelines involved in the account staffing process.

Sections of Document:

- Process Overview
- Timelines of Staffing Completion
- Timelines of Staffing Release
- Incoming Accounts Deployment Requirements
- Steps in the Staffing Process
- Kickoff Blackout Dates

Resources:

- Staffing Solutions Deck
- Staffing Leads

What the process is

- The Account Staffing Process ensures that accounts are staffed on time with the appropriate personnel to meet client needs.
  - This process involves multiple parties and teams working in collaboration to ensure seamless service delivery to retain our clients. This process ensures a cohesive process from the initial deployment to incoming accounts during the sales process to overcommunication on staffing needs and deadlines

---

All Staffing Parties Involved:

- Sales

Account Staffing SOP

- Divisional Staffing Teams
- Shared Services Staffing Teams
- Operations Support

Staffing Rate + KPIs

- Ongoing Staffing Rate Goal:
    - 80% staffed within 2 business days
    - 15% staffed within 3-4 days
    - 5% staffed within 5 days

Ideal Timeline

Sales Team

- Provide information as early as possible *(once it is considered a forecasted deal*) during the contract stage. Ensure information is complete and accurate to avoid delays.

Account Leadership

- Staff the Account Manager (AM), Account Director (AD), and Group Director (GD) within 2 business days of the ‘Ready to Staff’ automated message, or by the staffing due date.

Channels

- Staff within 2 business days or by the staffing due date, Sales shared the request or Bryn tags you to complete

Completion Expectations

- 1-2 Days: Great
- 3-4 Days: Okay

Account Staffing SOP

- 5+ Days: Poor

Team Release

- Team Release after 14 days with no contract movement, 30 days for Enterprise.
  - Meet the team exception: If the client has met the staffed team we can hold the team for 30 days after the meet + greet but will be released after the 30 day mark.

**No contract movement is when a contract has not moved from the current stage it's in to the next (ie: Legal to Signature)*

Steps

- **Step 1: Deployment:**
  - Sales to complete the Slack form in #Incoming-Accounts by filling out the information seen below in the template.
    i. ***The Sales Rep to drop when it gets added to the sales rep forecast in Salesforce***
      - Every Deal will be tagged with one of the following:
        - 🟢 **Ready to Staff** 🟢 **-** *has a due date that is within 3-5 business days*
        - 🟠 **Meet the Team Only** 🟠 - *Account Leadership - only need to staff account leadership or specific strategist required by client*
        - 📩 ***RFP Submission*** 📩 **-** *Account leadership + optional additional staffing based on requirements.*
        - ‼️ **Immediate Staffing Needed** ‼️ (approved by VP [tag VP here]) - *Needs staffing within 48 hours*

Account Staffing SOP

- 🛑 **Wait to Staff** 🛑 - Dropping in for visibility but the account won't close for a while, so will circle back when it's ready to be staffed

- **STAFFING DUE DATE GUIDELINES:**
  - The staffing leads will have at LEAST 48 hours to staff the account.
  - The only exception is if the deal is out for signature - the team will have 24 hours to staff + must be approved by a Revenue Org VP.
    - In Deployment under "STAFFING DUE DATE" it must be at least 2 business days
    - If approved by VP, it will be due tomorrow (not the same day) and must tag VP who approved the rush request.
    - Must have definitive tier + business unit (for ready to staff trigger)
    - If deal was dropped in ahead of time - when we are ready to announce the "ready to staff" trigger - Sales lead must confirm the channel mix
      - We would like to know if the mix has changed originally from what was dropped in so we can tag the appropriate team members

- **Sales: How to categorize the type of staffing needed**
  - Sales lead to assign a Client Tier based on the last 12 months of revenue across all sales channels (D2C / retail / brick & mortar). *This revenue should be requested directly from the client during the sales process.
    - Core = < $15M
    - Growth = $15M - $50M
    - Enterprise = > $50M
  - Sales lead to determine Vertical - Subvertical Mapping based on the below Hierarchy (if a client falls into multiple categories):
    - B2B = primary business type is B2B
    - Fashion = All apparel (including baby) or shoes (excluding performance apparel like Battle Sports)

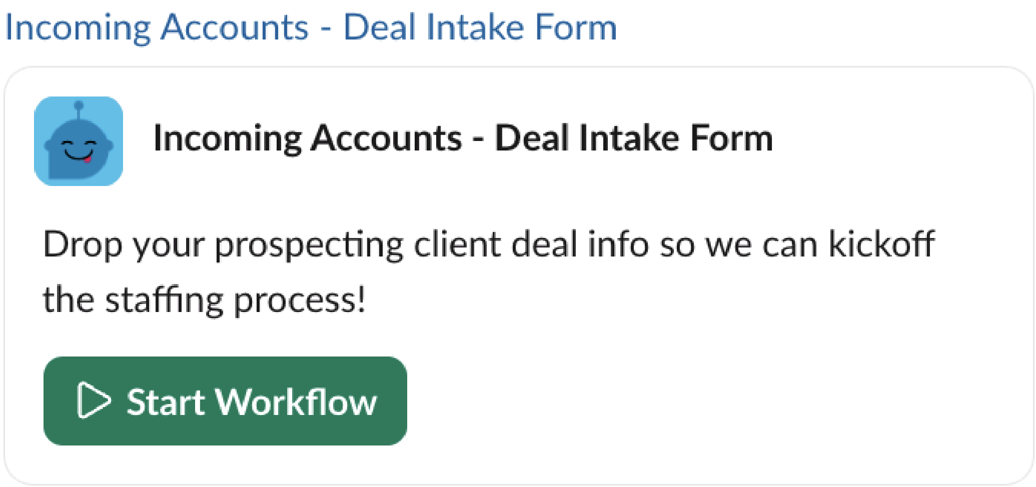
Account Staffing SOP

    - CPG = All consumable products including the following verticals: Beauty & Health, Vitamins, Supplements, Food & Bev, Baby & Pet.
    - Lifestyle = Consumer products that do not fall within CPG & Fashion. Primary categories include but are not limited to Home Goods, Sports/Fitness, Electronics or Accessories (handbags, sunglasses, etc).
    - Consumer Services = Lead generation business model (includes app & events/hospitality)
- Sales lead to follow the decision tree to determine Division Assignment.
    - **Core Division** = all clients assigned the Core Tier unless B2B Vertical or if they meet 2+ of the below criteriaIf 2+ of the below criteria is met then the client will be assigned to the Division aligned with their vertical (Fashion, CPG, Lifestyle or Consumer Services).
        - Retainer > $20K/month
        - Holding/Parent company
        - PE or Referral Partner
        - 4 Channels or more
    - **True Enterprise Division** = all clients over $300M in annual revenue (brand or multiple brands under holding company) but excludes Consumer Services (B2C Lead gen)
    - **B2B Division** = all B2B clients despite client tier
    - **Fashion Division** = All Growth or Enterprise in Fashion Vertical, unless single channel shared service.
    - **CPG Division** = All Growth & Enterprise in CPG Vertical, unless single channel shared service.
    - **Lifestyle Division** = All Growth & Enterprise clients in Lifestyle Vertical, unless single channel shared service.
    - **Consumer Services Division** = All Growth or Enterprise in Consumer Services Vertical, unless single channel shared service.
    - ***Shared Service**s = All single channel clients with the following services: PR, Affiliate, CRO, Lifecycle, Retail, Programmatic, Strategy/Consulting, DI.
- Next steps: Sales lead to share Tier, Vertical & Division mapping with CS Ops Managing Director to validate both
    - Consults with the division VP as needed based on the exception framework
    - Once Tier, Vertical & Division are confirmed, CS Ops Managing Director shares GD/MD assignments to support as needed with the pitch/appraisal process.

Account Staffing SOP

Template for Incoming Accounts

Within the #incoming-accounts slack channel please click the link in the pinned message or use the shortcut ***/incoming accounts - deal intake form*** to launch the intake form.



- **Step 2: Deployment Review**
  - Once submitted by Sales Lead, Jenna is assigned the information in an automated Asana task to QA deployment information to ensure division, tier, and vertical assignments are accurate.
    - If applicable, Sales lead will be tagged in the thread for any missing information and should be filled out within 24 hours.
  - Jenna to mark task field as 'Approved' and assign the task to Bryn to move forward with staffing
    - This will automatically send a slack to the division channel letting them know about the new staffing request in Asana
    - Bryn to assign subtasks to the GD and channel leads to complete, using the deployment information and Blueprint.

Account Staffing SOP

- ## Step 3: Staffing Begins
  - Staffing Leads to check their respective division staffing channel daily, for new deployments and to discuss any decisions being made.
  - When a lead is determined for the staffing request, the name/s are to be added as a comment in Asana by the staffing lead, by the due date given in the deployment.
  - Bryn to list the entire requested team and share it to the Sales lead in the #incoming-accounts staffing request.

- ## Meet the Team Requests/Pre-Appraisal + Requirements
  - **<u>If the client requests to meet the team</u>** or have them on the appraisal, the sales lead to follow the below:
    - Drop into #incoming-accounts using the deployment form and ‘Meet the Team’ Selection.
      - With VP approval if it’s pre-appraisal
    - Only staff **leadership team members of the following based on the thresholds below:**
      - <$10k - 1 team member
      - $10k-$25k - 2 team members
      - $25k+ - 3 team members
    - Must give 2 business day notice so that the team has ample time to staff and prepare for the meeting
    - Strategists will not be joining the team meetings unless specifically required by the potential client
  - After meet the team - we will trigger “ready to staff” with a 48-hour window (unless approved for 24 hours by the VP) that Bryn will assign out and own comms in the channel.

- ## Releasing the Team
  - After 14 days with no client contract updates, Bryn will update Staffing Leads via Slack so that they can release the team that had originally been staffed, to open their availability for other opportunities.
  - Sales to communicate any further contract updates to Bryn to redeploy trigger for staffing.

Account Staffing SOP

- **Preparing for Kickoff**
  - To ensure the success of our team and clients, we require next steps and timelines to be followed as listed in the **Sales<>Marketing Handoff Process.**
  - Please see below for Kickoff Blackout Dates:

2025 Client Kickoff Blackout Dates

Instructions:

- **Holiday Weekend Kickoffs:**
  - If a client signs the contract the week before a holiday weekend, the sales representative must inform the client that the kickoff cannot occur on the Friday before the holiday weekend.
- **Backdated Contracts & Deliverable Timelines:**
  - If a client signs after the designated contract start dates (the 1st or 15th) and the contract is backdated, the team still has one month from the signing date to complete Month 1 deliverables. This must be clearly communicated to the client.
- **Ramp-Up Period for Backdated Contracts:**
  - If a client's contract is backdated, the sales representative must inform the client that the team will still require the standard ramp-up period before kickoff, **5 business days** from the signing date.

August

- August 15th - Mental Health Recharge Day
- August 29th - Kickoff blackout date

September

- September 1st - Labor Day
- September 2nd - Kickoff blackout day

October

- October 10th - Kickoff Blackout Day
- October 13th - Indigenous people's day

November

- November 26th - Kickoff Blackout Day
- November 27th-28th - Thanksgiving

Account Staffing SOP

December

- December 1st - Kickoff blackout day
- December 23rd-26th - Christmas Break
- December 29th - Kickoff Blackout Day
- December 30th - Kickoff Blackout Day
- December 31-January 1st: New Years

January

- January 2nd: Kickoff Blackout Day