

Agency Onboarding & Management Guide

Contents

[Agency Onboarding Process](#)

[Campaign Kick-Off Process](#)

[Creative Brief Template](#)

[Creative Review Process](#)

[Creative Evaluation Framework](#)

[Agency Reviews](#)

Introduction

A good relationship with your creative partner—whether an ad agency or an internal team—is key to successful marketing campaigns. A good relationship is based on both sides having clarity on all aspects of the relationship.

To create an environment that encourages BIG ideas from your creative partner:

- Have an agency onboarding process
- Write a brief for every project
- Be accessible for questions
- Communicate transparently
- Deliver thoughtful, organized creative feedback, on schedule
- Share information, be honest, and tell the agency what will make them successful
- Communicate if something goes wrong as soon as possible, and help the agency close the gap
- Help the agency navigate the organization – defining stakeholders, influencers and decisionmakers
- Treat the agency as a partner rather than a vendor

Agency Onboarding Process

Before you onboard the agency, share your company's vendor set-up process with the agency.

Onboarding should include everything the agency needs to know to navigate the organization, as well as a social 'get to know you' component. This is best done in person. This might take an afternoon or several days, depending on how much they need to learn.

- A review of the brand, company, products

- Your 'why' – the problem(s) you solve and why it matters
- Your customers – segments, personas, insights, buyers' journeys
- Marketing campaign framework
- Company org chart
- Logistics of how you will work together
- Information on your first project
- A social event, like a dinner

Onboarding sets the terms of the relationship. Your goal is to communicate what you expect from the agency, and what they can expect from you – so you both know how to create a mutually beneficial relationship that results in breakthrough work.

Campaign Kick-Off Process

1. Develop and approve the brief.
2. Determine the right agency/agencies to work on the campaign.
3. Host an internal kick-off meeting with stakeholders.
4. Host an agency briefing, including people who are working on the campaign/project. Make sure the agency asks questions and understands the brief. Encourage big ideas and let them flourish.

Creative Brief Template

Project:

Date:

Project Team Members	Roles & Responsibilities

Project Description

A description of the campaign or tactic – what is the asset, where will it be published/distributed, how will it be used?

Goal

What are you broadly trying to accomplish?

Objective

How will success be measured?

Target Audience

List persona or description of target audience(s)

Audience Insight

A statement based on a deep understanding of the target's attitudes and beliefs. It connects on an emotional level, provoking a clear response that can change the audience's behavior. The gap between the target's motivation and the barrier they face represents a potential opportunity. You can use this template:

"I would like to [goal/wish] because [motivation] but [barrier]."

E.g., "I want my kids to brush their teeth because I want to be a good mom, but it's so hard to get them to do it themselves."

Insight: Moms need a way to motivate their kids to brush in order to feel like they're good parents.

Current Perceptions

How does the target audience currently perceive your brand, topic, product, or industry? Include beliefs and feelings.

Desired Perception

What do you want the target audience to feel and believe?

Tone & Manner

Describe the desired style for this project. For example, formal, conversational, precise, educational, friendly, inspirational.

Key Benefit

What is the single-most important benefit you'd like to communicate? When possible limit this to one idea.

Reasons to Believe

What objective facts or data support your benefit? Include citations if applicable.

Call to Action

What should the target audience do once they've consumed this content?

Creative Examples

Are there any relevant examples that you see as best-in-class for this project?

Mandatories

List any project requirements– e.g., legal/regulatory disclaimers.

Related Tactics

E.g. syndicated content, or marketing programs driving traffic to this content.

Background and Supporting Assets

Consider attaching the following information to support this brief:

- Persona
- Buyer's journey
- Message map
- Content outline
- Data or references
- Competitive examples

Creative Review Process

The person spearheading the creative project should schedule a creative review meeting with the agency and all approvers. Supply each reviewer with a copy of the creative brief and the creative evaluation framework, below.

The agency shows the creative work, allowing time for questions for each creative approach.

Now it's time for your team to put together your creative feedback so you can articulate clear, actionable feedback to the agency. There are two methods: you can either excuse the agency from the room while you discuss, or you can let them sit on on the conversation.

To begin feedback, each person should independently complete the [creative evaluation framework](#). Once everyone is done, start with the first creative approach, letting each person describe how they scored the approach. You can either start with the most junior person in the room and work your way up to most senior, or you can start with one person at the table, and work your way around. If you are going around the table, go the opposite way around the table to review the next creative approach. There will likely be some back-and-forth as stakeholders debate or reconsider their initial impressions of the creative.

The person spearheading the project should take notes on where approvers agree and disagree. Discuss with the team the feedback you will be giving the agency. There are three basic directions you can give to the agency:

1. Go
2. No go
3. Revise

Tips:

- Be clear and specific with your feedback, from the first sentence.
- Give specific reasons why you are turning down an execution, element or campaign.
 - E.g., “We don’t feel the benefit is coming through loud and clear.”
- When turning something down, make the *advertisement* the villain.
- When giving praise, aim it at the *team*.
- Distribute a feedback summary to all meeting attendees within 24 hours of the evaluation meeting. Provide an overview of what was agreed upon, and next steps.

Remember: If the feedback is unclear, non-actionable, too subjective, or crushing—you won’t get the best work from your creative partners.

Creative Evaluation Framework

Each person should complete the evaluation before sharing opinions.

For each creative variation (option), score the questions based on this scale:

0 = No

1 = Somewhat

2 = Very well

<i>Is it on brief?</i>	Option 1	Option 2	Option 3
Does it connect with the target audience?			
Does it deliver the key customer benefit?			
Does the benefit leap out of the work?			
Is the tone and manner appropriate?			
TOTAL			

<i>Is it effective?</i>	Option 1	Option 2	Option 3
Is it single-minded?			
Is it memorable?			
Does it grab your attention and cut through the clutter?			

Does it have legs? Can you see this execution working today and into the far future?			
TOTAL			

How Do You Know if Creative is Effective?

- ✓ Builds your sales overnight and your brand over time
- ✓ Compels the audience both emotionally and rationally
- ✓ Links the brand to the core idea so well that it's impossible to use the creative asset without the brand
- ✓ Delivers a benefit that is *important* to the target audience. Bonus if it's also a differentiating benefit.

Single-Minded: Getting across one idea is hard enough – your audience isn't paying that much attention. Getting across two ideas is extremely difficult, and three is impossible.

Simple: Your audience shouldn't have to work to figure out what you're trying to say.

Repetition: It's good; that's how we remember.

Memorable: Will your audience remember the message tomorrow? Next week? Next month? Memory is linked to emotion.

Cut through the clutter: If you can't get their attention, they won't see the creative. Reward people for paying attention – with information, education, entertainment, emotion.

Campaignable: A campaign has to be based on a BIG idea. Big ideas should last a long time and work in most types of media. Some of the best campaigns have run for years. Think beyond the month or year, and don't stop using a campaign just because it's been around for a while.

Agency Reviews

Periodic agency/client reviews are an important way to encourage great work and maintain a good relationship. The right frequency depends on the organization, but should be annual at a minimum.

Goals:

- Recognize agency success
- Identify areas of focus and ways to improve
- Establish goals and expectations for coming year

Survey stakeholders to understand:

- Have specific objectives been met?
- Is account staffing appropriate?
- What is the strategic contribution of the agency?
- How's the agency's tactical execution?

Consider soliciting feedback based on:

- Campaigns
- Strategy
- Production and trafficking
- Financial management
- Innovation
- Collaboration
- Account Management

Conduct an evaluation meeting with key internal stakeholders before reviewing feedback with the agency.

- Review survey findings
- Discuss agency strengths and weaknesses, and prioritize areas to improve
- Define the strengths most important for achieving results in the coming year
- Develop an action plan targeting dominant themes

Schedule a review meeting with the agency to share findings and action steps. Make it a two-way discussion, and solicit their feedback and changes to the action plan. Once the action plan is in place, conduct periodic check-ins with the agency and communicate progress to agency and internal stakeholders.