

Agency Operations Handbook 2019

10 Ways to Boost:

-  Margins,
-  Productivity &
-  Client Satisfaction



Contents:

Introduction: Achieving agency operational excellence in 2019

- 1 Save the rainforests and digitize your briefs
- 2 Wave goodbye to old-school hotsheets
- 3 Smart scheduling and capacity planning
- 4 Stop creative gridlock
- 5 The black arts of scopes of work and budget estimate
- 6 Profitability – How to avoid the trap of over-servicing clients
- 7 Time-tracking tackled
- 8 Agency talent management
- 9 Avoid asset dumping grounds
- 10 Winning and retaining clients

Looking forward: Why agency-focused technology rules the roost





Achieving Agency Operational Excellence in 2019

Account-Based Marketing, AI, Smart Content – these are just some of the buzzwords that floated around the marketing and advertising sphere in 2018.

New digital trends have led to increasing demands from clients. An agency operation today needs to be robust, capable of aligning projects with strategic business goals. Resources need to be effectively managed and utilized, processes need to be efficient and of course, crucially, performance has to be measured.

Transforming your agency operations is no easy feat, however, with the right process and tools in place it is achievable.

Here's 10 ways to make your agency more productive and profitable in 2019.



Save the rainforests and digitize your briefs

A briefing template in a Word doc is a great start but it's time to go the extra mile and fully digitize your briefing documents. Taking this move will have a massive knock-on effect across your operations.

Text and specifications put into Word documents will give you good reference material but that's where it stops. On the other hand,

if you create digital job jackets, you now have all your data searchable and reportable – your 'big data' becomes accessible.

Digital forms also give you new possibilities, for example, Word docs or paper briefs are not smart – they can't show or hide fields based on user inputs or automatically set notifications and start workflows.

And, don't forget one huge benefit – digital job jackets mean that your data is captured so that when your staff move on to the next step in their careers, their data does not walk out the door with them.



Wave goodbye to old-school hotsheets

In 2018 there was enormous attention on the effect of robotics on traditional manufacturing jobs. Well some traditional agency management and project management activities are also ripe to be disputed by 'automation'.

For example:

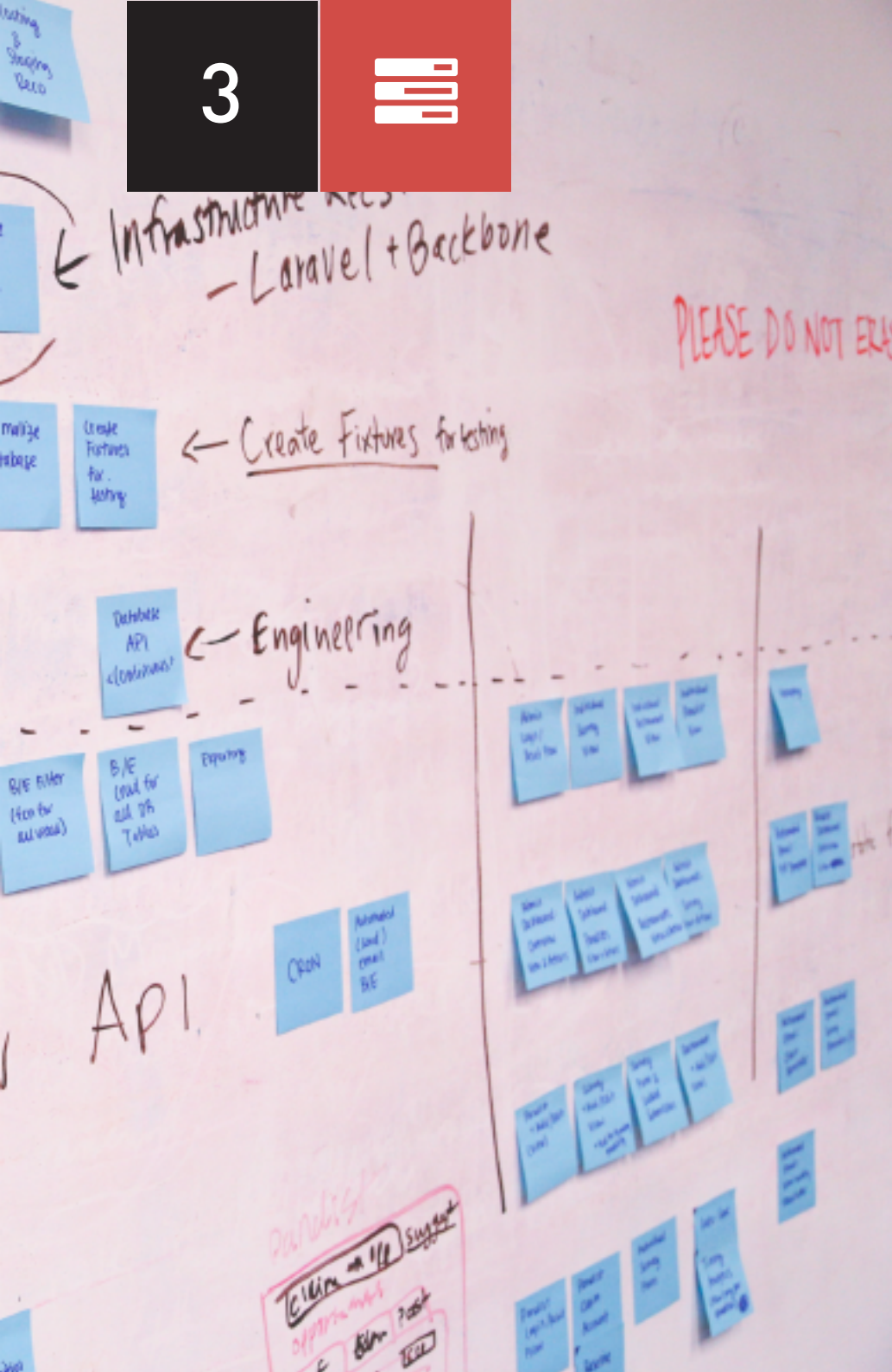
How many hours do your teams spend preparing reports for internal and external stakeholders?

From our experience, it's at least in the hundreds.

If you digitize your processes you will be able to create automated reports that can be scheduled to be distributed at set times saving your Project Manager or Account Manager lots of manual low value-added work.



3



Smart scheduling & capacity planning

Are you still using the traffic wall planner with sticky notes or Excel – possibly with fancy macros?

Be assured, there is a better way that can empower both resource requestors and resource planners. Screendragon's project management platform is able to intelligently integrate user profile data (such as expertise, FTE, working days etc.) with task and project charter data and visualize this data in easy-to-understand resource utilization calendars and forecasted capacity charts.

So, let the computer crunch the numbers so you can get actionable insights on how your resources are being utilized.

Stop creative gridlock

How many times have your creatives or developers being planned in for a meeting only to discover that they don't have all the required information or specifications to begin the work?

Digital project templates reduce the frequency of the above occurring by requiring users to fill in specific data to progress to the next stage of the workflow.

Say goodbye to unnecessary creative gridlock and unlock your team's true creative potential with better project briefing.



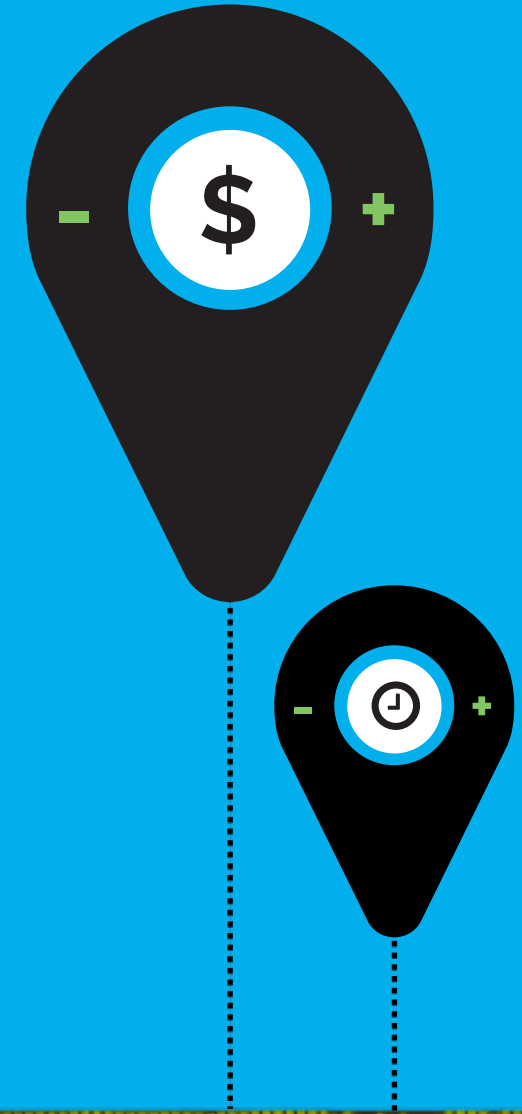
The black arts of scopes of work & budget estimates

What's the most important skill to maintain a profitable agency?

The ability to produce a good scope of work budget estimate. Unfortunately, most agency staff spend too much time trying to figure out what rates they need to use for different staff, different clients and different deliverables.

It's wide open for mistakes and they happen often, everywhere.

However, you'll be glad to hear that it's an easy solve – take the leap to professionalize your budget production. It's not difficult and is one of the easiest steps to take to improve business performance and achieve fast ROI.





Profitability – How to avoid the trap of over-servicing clients

Do you really know why you are over-budget? Are you able to put a strong case to a client why they should compensate you for extra project time?

Most agencies do not have their operations set-up to monitor collaboration activities and log rounds of revisions and client requests.

Good workflow technology will keep an automatic audit log of all project workflows, tasks, approvals and requests.

You get better insights into why certain things are taking longer or why more resources are being called in to help out.





Time-tracking tackled

What agency doesn't struggle to get their staff to log their hours correctly and on-time? You all know that the key to doing this right is to make it super simple for everyone to do. Of course, 'super simple' isn't always easy to attain. If this was the case, then it would be commonplace to receive fully completed timesheets from employees agency-wide.

Screendragon's approach is to integrate time-tracking very closely with project activities.

So, when a Project Manager is creating a job jacket and tasks for the team it automatically populates these project and task details into the Time Tracker of the individual resource. No more frustrations searching for projects to log hours to – everyone sees immediately what they can input for each week of the year. So doing, helps reduce people-chasing, making it easier to focus on getting the bills out on-time.





Agency Talent Management

High staff turnover is the bane of every agency. According to recent research, it's been estimated that it takes 20 weeks before a new employee becomes productive and that the costs of replacing a staff member are 150% of the first year's salary.

Screendragon can help alleviate the challenge of managing staff change in two key ways.

- 1** Screendragon comes with a talent management system that holds staff profiles and integrates these profiles with a resource management capability. So gone are the days of wondering if there is someone in the team with html5 experience. Resource managers can now search the team database and see who has the necessary skills and availability.
- 2** Project process templates – build your 'ways of working' into a digital platform so that the learnings you have built-up on how best to run projects are not trapped in the heads of staff who may later move on from the company.





Avoid asset dumping grounds

The problem with DAMs is that they tend to become isolated dumping grounds – moving from one system to another to manage projects and files.

It is just not an efficient or effective way of working.

Screendragon's built-in DAM is fully aligned with the project management workflows, allowing final approved assets to naturally flow into the DAM instead of having to ask teams to archive their work separately.



Your Lifeblood:

Winning and retaining clients

All agencies love winning new business, it keeps the spirits up and ensures topline growth.

But, we all know that the lifeblood of any agency is client retention, which ensures long-term sustainability.

So, how do you manage fast growth responsibly, ensuring you bring in new clients professionally and keep service standards high for existing clients? By having the right people, processes and systems in place.

Systems help you plan and effectively deliver, ensuring that those big ideas that initially attracted clients to your agency are not destroyed by chaotic execution.



Looking forward:

Why agency-focused technology rules the roost

Today's complex marketing and media landscape requires technology to help us all manage the moving parts. Clients are now demanding new skills of their agencies – they are asking them to be master organizers – have the ability to collaborate with lots of different partners and synchronize efforts between them.

Screendragon has been working in the agency space for over 10 years – we know how to wire your agency for these new realities.



Join the many global agencies using Screendragon to streamline their operations and improve their bottom line.

Get in touch today for a free demo of Screendragon.



Interested in finding out more?

Contact our Customer Success Team for a free no-obligation demo and see how Screendragon can transform your agency operations.

Contact us at sales@screendragon.com

www.screendragon.com