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**Scale Your Agency:
How Processes Can Make or Break Your Strategy**

We Know How Agencies WorkSM

Introduction

No matter the size of your team, the age of your agency, or the services you offer, the goal of any successful business is sustainable growth. In the creative industry, sustainable growth is realistically attainable expansion that firms are able to maintain without running into major conflicts. An agency that grows too quickly may find it hard to fund the boom; a business that grows too slowly may stagnate.

The most successful firms have created business models that easily scale to generate massive revenues—without adding massive costs along the way. Scaling is all about adding revenue at exponential rates, while adding resources at incremental rates.

One key to growth and sustainability is establishing processes that can scale up or down as needed. Internal processes are the foundation on which every business is built. They help organizations improve efficiency by offering a way to measure progress and productivity. At their core, they unite people, processes, and tools to complete a shared objective.

And the most scalable firms are those that have effective processes implemented to track resources, revenue, and project needs.

Bad practice may seem like it only affects a single account—but multiply its effects across an entire business and you can be in big trouble. Luckily, it's easy to avoid major catastrophes. Creating a strategy that allows central implementation and monitoring of internal processes will make it simple to protect your business growth strategy from the problems caused by bad practice. To help discover how processes can make or break your strategy, consider the following ways they impact your business.



Integration

Whether they like it or not, the different departments in your agency are required to interact with each other from time to time. And often, the success of a campaign or project rests on this cross-departmental communication. Integrating your processes across your agency ensures that all departments are on the same page. This is vital to the success of a professional firm, particularly because most agency processes are largely sequential instead of adaptive.

Keeping everyone in your agency on the same page can positively impact your strategy. By bringing together accounting, collaboration, CRM, project management, digital proofing, and media management systems, integrated processes:

- Encourage natural communication.
- Foster collaboration and build internal relationships.
- Eliminate wasted time.
- Encourage productivity.

Not only will your agency avoid unnecessary delays in communication, you will be able to access all of your information in a convenient, central location.

Integrated processes also encourage a positive work environment. While many stories of cross-departmental drama can be largely exaggerated, miscommunication is one of the leading causes of any fuss. Why manage your agency with five different systems when you can implement one singular, integrated system?

Maintaining an open, integrated communication system creates an environment of transparency, which not only mitigates conflicts, but also encourages collaboration.

Project Management

Singlehandedly managing an agency's entire workflow is unrealistic, no matter the size of your team. Because as you know, projects can stack up quickly. One project can usually be managed by hand, but an entire agency full of projects requires an entire agency worth of hands. And while managing workflow can be a challenge, deploying a robust project management process can alleviate unnecessary stress.

As you know, managing tasks is the core of all project management. Simply put, implementing effective processes can help automate tasks. Incorporating integrated project management tools encourages efficient management strategy, exceptional oversight of your employees, and consistent quality of work. The best systems also provide managers with a clear status of their firm's projects and individual resources.



The most effective processes should be able to do the following:

- Generate project lists by client.
- Produce status and calendar updates, briefs and communication notifications.
- Provide time estimates for each task.
- Link dependent assignments.
- Show project overlap.

Not only does this streamline workflow capacity, it encourages effective communication across your team. Gone are the days of each person, team, or department tracking individual projects. Say hello to automated processes! By keeping track of project tasks in a convenient, central location, everyone involved on your team will know exactly what, where, when, and how things are happening.

Informed employees are happy employees—and happy employees are productive and prolific.

Resource Management

Your team members are your most precious assets—but the more you have, the harder it can be to keep track of their availability. And keeping all of your employees happy should be one of your primary concerns.

Keeping track of staffing availability and project needs ensures that your team is productive but not overworked. Failing to accurately comprehend and predict needs can lead to overworked and stressed workers, poor creative output, and high turnover rates.

With this in mind, it becomes painstakingly obvious that resource management should be a primary focus of your agency's processes.

Systemized resource management processes provide managers with an understanding of work habits and skills. Communications tools allow managers to track down their employees without ever having to leave their browser windows. This way, managers are able to gauge if resources are being utilized to the best of their ability. Effective resource management also builds accountability and task ownership, reduces repeat mistakes and minimizes departmental conflict.

Not only does resource management maximize efficiency and minimize wasted time, it allows your agency to anticipate growing pains by forecasting needs and availability. Paying attention to processes provides an accurate estimate of agency capabilities, helping managers determine if a client's requested due date is feasible given the current resources. Furthermore, keeping an organized record of procedures and resources provides an outline for future projects and helps improve policies and processes.

Finally, effective processes enable the modern office to thrive. With robust resource management tools, keeping track of freelance and remote employees is a concern of the past. The best software facilitates cross-departmental collaboration and makes communication across multi-office and remote agencies possible.

Having a comprehensive, updated view of resource availability is paramount to your agency's success and sanity.

Project Requests

Many projects tend to be fairly homogenous, at least from a process standpoint. You establish a schedule, kick off a project, create a solution, test it out, roll it out—and you're done. Right?

Ideally, yes. But then there are those particular clients. And as any creative industry vet will tell you, there's no such thing as a strange request. The way that managers anticipate and respond to these nuanced requests can largely impact overall strategy. To deliver a project successfully, managers need to overcome the obstacles of changing objectives. And because change is inevitable, it's best to be prepared.

Without a standardized process, communication breakdowns and delays are more likely to happen. These roadblocks lead to frustration at best, and hours of work spent addressing misunderstandings, clarifications, and other problems at worst. Incorporating a proactive project request format into your agency's daily operations will help you adjust to anything that clients tend to throw at you—even those horrifying last-minute requests.

Automated project request templates incorporate budgets, deadlines, specs and notes—or everything that goes into a comprehensive brief. Creating and adhering to a standardized process for requesting and approving project changes ensures that all the necessary parts are already in place when it's time to begin a new project—or modify an existing one.

The ability to control project requests saves your agency valuable time and effort. No matter the request.



Updates and Collaboration

Before the days of robust project management software, managers were forced to rely on memory or verbal communication alone. Without automated processes, different groups would use different methods for tracking, resulting in massive confusion, deadline issues, and missed work. How was anything completed?

We think it's time to bid farewell the days of sticky-note reminders, forgotten deadlines, and empty promises. Scalable, customizable solutions are the new norm.

The key with implementing collaboration in the creative industry is to fit it into the natural flow of work. And a large part of this relies on management's ability to keep the workflow organized. Automated processes increase accountability and reduce time spent on tedious administrative work. Robust project management software enables communication across your entire team in the most efficient, effective way possible. When your employees are on the same page, natural collaboration is encouraged.



The best software even tracks your past communication for thorough reference on demand. Avoid unnecessary disagreements and misunderstandings by maintaining a constant record of change requests, brainstorm sessions, and email conversations.

Integrated software not only allows you to keep track of meetings, updates, and action items in one centralized location, it tracks updates in real-time. This means no one will be bothering you for project status updates or wasting your time with administrative status meetings. Instead, you'll be able to focus on making your project's accessible for your team members.

What's more? The less time wasted on administrative work means more work doing the important stuff: concepting and creating.



File Storage

The rise of remote workers and nontraditional offices has led to an increased demand for ubiquitous access to any file, any place, on any device. Keeping employees connected at any time is an emerging priority for all industries and has led to a spike in cloud service providers. And while some service providers deliver on the promise of connectivity, more often than not, they end up creating silos of information—or islands of data file storage that exist within data centers.

Files kept in silos can be easily lost or impossible to find in the crucial moment when they are needed. In today's digital landscape that demands always-on and always-accessible data, storing data in silos decreases operational efficiency, reduces collaboration, and increases difficulty in searching and accessing data. Agencies are required to remember whether they are located on local hard drives, shared file systems, document management apps, or consumer file sync-and-share apps.

Why deal with impenetrable silos of information when it's possible to store all files in an accessible, central location? Robust file sharing systems make it simple for approved parties to access files stored on local servers and prevent the loss of access to key personnel.

Implementing software that increases the efficiency of operational processes and allows for effective file storage is a win-win for your agency. Incorporating an effective program into your agency's processes also guarantees safe, reliable transfer of data—at any time of the day, and from any device. Whether you're sharing with freelancers, clients, or remote employees, you can ensure that everyone gets the assets they need to get the job done.

Reporting

Ah, reporting. While many managers dread the task of client reporting, it is the lifeblood of agency-client relationships—and the key to any agency's success. Keeping your clients in the loop with accurate, reliable reports is essential for maintaining client trust. And implementing customizable reporting processes is the only way to ensure complete satisfaction. After all, you don't want to be left taking guesses based on how you think things have gone.

Efficient reporting processes enable agencies to run reports and produce information at the click of a button. By providing a centralized data source for every department in your agency, it's simple to gather numbers from different pieces of the puzzle.

Not all reports are created the same. And not all clients want to see the same status information. Paying attention to your agency's reporting process can make or break your customer retention numbers. Customers that feel valued are more likely to become repeat buyers.

Have a client who demands every detail? Break your reports down to budgeted hours, actual hours, and number of days into the project. Have a client who fears details? Provide the basics: start date, complete date, and a status report. Some clients might want a Gantt chart, while others might want a grid or a calendar. Utilizing custom processes allows you to personalize reports around specific clients.

Reporting isn't that bad anymore, is it?



Revenue Projection

Sure, predicting the future may be impossible. But accurately forecasting revenue and spend based on your agency's current budget and future needs is totally possible. A reliable projection of future revenue based on past data makes it possible for you to plan for the future with confidence that you have a realistic picture of where you are going, what you can afford to do now, and what would be better saved for later.

Even if a project is creatively brilliant and delivered right on time, it is all for naught if it goes over budget. Adhering to accurate budget management processes helps keep your projects on track.



Revenue forecasting software can help monitor your finances as well as streamline the process by creating and updating forecasts. Robust software takes data from everything your agency has in its system—opportunities, project estimates, project billing schedules, retainers—and feeds it into a single revenue forecast.

By having processes in place, your agency can look at project schedules to know when billing is likely to go out and when payment is likely to come in. You can analyze not only at the projects you have scheduled but also retainers, sales opportunities, and projects currently awaiting approval. You can gauge whether you should hire new staff immediately or wait until next quarter. And you can accurately estimate how much revenue you can count on in the coming days, weeks, months, quarters, and even years.

It may not be the same as gazing into a crystal ball, but we think it's the next best thing.

Conclusion

Creative firms that are able to automate the delivery process of their services and projects are easily scalable. As outlined above, maintaining effective project management processes that encourages collaboration, stores files, and effectively tracks resource usage and revenue projection—all while providing careful attention to details like client reporting and project requests—is crucial to an agency's strategy.

Workamajig allows you to combine these crucial processes into one centralized location so that you can keep track of everything from one place, protecting your business from the pitfalls of bad practice and allowing you to identify and focus on developing your business and delivering to your clients. Our software was the first Web-based system built specifically for the creative industry—so you can be sure that we've developed our services around the unique realities of agency life.

At Workamajig, we enable sustainable, scalable growth. We make monitoring your internal processes simple. And we protect your firm from the problems caused by bad practice.

WHAT CAN WORKAMAJIG DO FOR YOU?

We know how agencies work.SM