

Keep—and Win—Clients with Better Client Management

By Judith Hector

So what keeps a client coming back? A cool office helps, sure. Great creative is a given. Shelves full of industry awards help, of course. Lots of golf? Maybe. But the real reason a client sticks around year and after?

It's the strong personal relationship that matters most.

Account executives are the traditional liaison between clients and the agency. They push creatives, pull the client, take the flack, and massage jobs to keep the work flowing. They are the first line of defense in keeping clients and a key element to your agency's success.

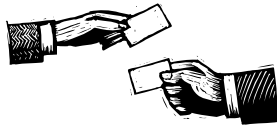
With the uncertain economy, there are fewer advertising dollars to go around—and lots of hungry agencies fighting for the same accounts. So who wins it? Surprisingly, it isn't the lowest estimate, the flashiest design, or the cleverest presentation. Now more than ever, accounts are won—and kept—because of outstanding client service.

But don't jump on your AEs and start demanding better client retention and new jobs right away. First, give them the momentum of



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MANAGE ACCOUNTS BETTER



Continued from previous page

an agency-wide strategic plan that brands your agency as customer-centric. Think *exceptional service*. Think *long-term relationships*. With a new, stronger agency position—and the synergy of a singular focus behind them—AEs can safeguard their current accounts and bring in new business.

Thank you, come again!

A recent survey shows that client-agency relationships are shortening from an average of 13 years to 7.6 years. Two main reasons clients called for reviews are that they are dissatisfied with the incumbent, or they felt they outgrew the agency's abilities.

Here's another painful statistic. When the incumbent is invited to compete for the work, clients choose it only 20% of the time.

Let's put it in dollars and cents. Say your agency bills \$8 million annually, and you retain 60% of your clients. With a 40% business loss annually, you've got to win \$3.2 million in new billings every year just to maintain your current level. Those lost billings will need to come from somewhere (translation: thousands of dollars in spec work, pitches, and wooing new clients).

The key to getting more work—and keeping revenue flowing—is getting clients to come back to you again and again.

Do you want fries with that?

Clients also dump incumbents due to the perception that the agency isn't capable

of providing full service or that the agency can't meet their growing needs. Your strategy should be to never stop selling.

Getting clients to buy into additional services is pivotal to increasing billings. It takes tenacity, attentiveness, and tact. Develop an empathetic partnership with clients so you can comfortably elaborate on needs that the client might not be aware of.

When you can, remind

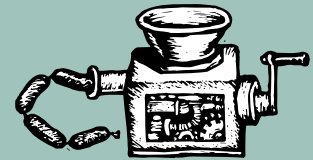
clients that your agency can provide more than whatever they've been getting from you. Drop notes, e-mail, and hints about successful jobs. Work in statistics and examples (e.g., a case study), and you've got a powerful pitch, delivered in seconds, that the client will remember.

In fact, clients confess that they develop their lists of potential agencies based on personal relationships, not unsolicited cold calls. So when a client needs that little extra something (an ad, postcard, or web site update, for example), the job will go to the agency that maintains the strongest personal relationship with them. Is that you?

A win-win-win situation

Take a look at internal and external teams to make sure you have a good mix of abilities. Getting additional work from existing clients—especially if the work is different than what you normally provide them—is dependent on having resources ready to assemble into crackerjack teams. Team members don't have to all be your own agency staffers. If needed, pull in freelancers or other trusted agencies.

Continued on the back page



Tools for Managing Client Relationships in Clients & Profits

Don't neglect the details about your clients! Keeping up with the nuances of each client is crucial to good client relationships. With details centrally located, you can easily find—and manage—client information.

Here are three powerful tools that help you manage and use the myriad of client details:

■ **Contact Manager** Track details about various persons at your clients' offices, including office and home phone, fax, e-mail, an alternate street address, a place to track last and next call dates, as well as a place for your notes about a contact. Mark them as a "decision maker" and whether or not "sales e-mails" should be sent to them to further define their role at their office.

■ **Proposals** Track potential work before it gets to the "creating a job ticket" stage. All possible work you suggest to current clients, all ideas for new work that clients come up with, and all new business pitches should be added as individual proposals. Proposals link to Contacts so those important details you added can be referred to as you're adding a proposal. Once a proposal is approved, generate a job ticket with one mouse-click and no rekeying!

■ **Meeting>Manager** A complete meeting tracker, the built-in Meeting>Manager records when and where the meeting will happen, its topic, objective, and duration, and who will attend (all of a client's contacts are listed for easy selection). An e-mail message is automatically sent to all attendees with details on the upcoming meeting. After wrapping up the meeting, add a meeting summary to record what was discussed, add any new action items, and indicate whether a follow-up meeting is needed. The summary can be automatically e-mailed to all attendees.

MEETINGS MANAGED MARVELOUSLY

By Mindy Williams

Get your meetings organized like a pro with just a few keystrokes and clients may think you've hired a meeting specialist. From location to duration, who'll attend, and what's on the agenda, your meeting prep work will be so precise that clients will think they're getting hours of special attention.

Clients & Profits' new **Meeting>Manager** informs key staffers in your shop and at your client's office about upcoming meetings, their topic of discussion, location, job number, and more.

Once all meeting details are added, send an e-mail—with no re-keying—to all attendees so they know the specifics. Also, take a printout of the meeting worksheet to make summary notes.

Got too many meetings to manage? The Meeting>Manager window summarizes all client meetings, including date and time, location, coordinator, topic, job number (if related to a particular job ticket), and

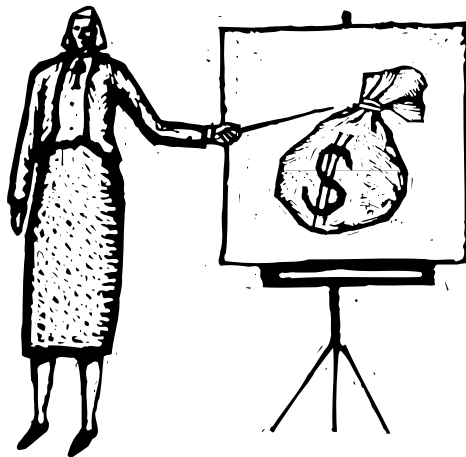
current status. No more last-minute confusion as location details are clearly listed when you select a particular meeting.

It's easy to cancel, postpone, or reschedule meetings with just a few keystrokes. You won't lose any data, and attendees are automatically emailed with the new date.

After the meeting, demonstrate to your clients just how a well-organized AE operates by sending a follow-up meeting summary e-mail. The meeting summary includes areas to recap the discussion at a meeting, outline any resulting action items, and even schedule a follow-up meeting!


So your clients may think you've hired someone to manage your client meetings but—come on—let's give credit where it's due. Your marvelous meeting manager is none other than you...with a little help from Clients & Profits!


Mindy Williams is a senior member of the Clients & Profits Helpdesk and coedits the quarterly newsletters.





Favorite client reports revealed


Clients & Profits offers hundreds of reports that give you a 360° look at your shop's production, costs, billings, and finances. Many, according to consultant Mike Wonnick, can be shared with clients to prove that you're a valuable partner, including:

 **Job Status & WIP.** Sort these reports by client, AE, and more for up-to-the minute status on current jobs.

 **Job Schedule.** Use the job schedule to keep your clients informed, on track, and accountable so they don't hold you up.

 **Detailed Job Summary.** This report sounds contradictory, but it's the only way to describe something that fits so much valuable information all on one page. It provides loads of information, from hours to estimates, billings to budget remaining. This report along, with **Job Progress**, are long-time agency favorites.

 **Production Planner.** Get a one-page look at the timelines of all jobs in your shop and keep everyone up-to-date on target dates for all client jobs, as well as identifying heavy and light workload periods.

 **Client Invoice Aging.** E-mail this report to better manage cash flow. "This keeps us and the client up to date on how much is outstanding before it gets out of control," says Rod Delahey of Heyday Communications. "If the invoices have already been approved, my client can e-mail the PDF to accounting, making things easier for everybody."

Mike Wonnick is a Clients & Profits consultant based in Saskatoon, Saskatchewan. Contact him at (306) 373-6795 or wonsystems@sasktel.net.

YOUR PERSONAL WORK CALENDAR

It's also a multi-user calendar that coordinates dates for all staffers

The My Calendar window, your personal calendar, is a monthly planner to help you better schedule your time—and remember where you're supposed to be.

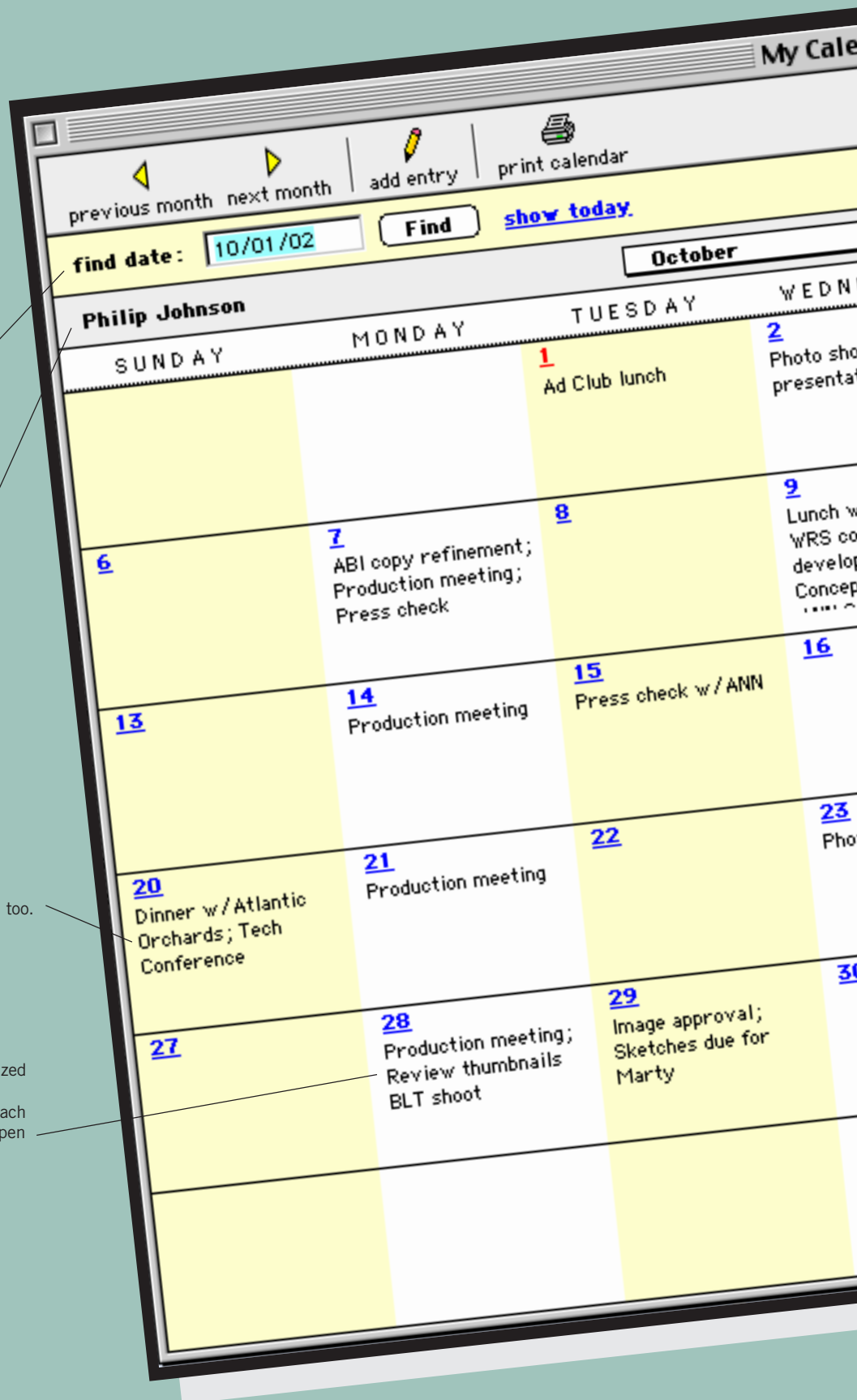
All of the calendars in Clients & Profits are designed to help you easily add, edit, and prioritize daily activities, planning months—even years—into the future.

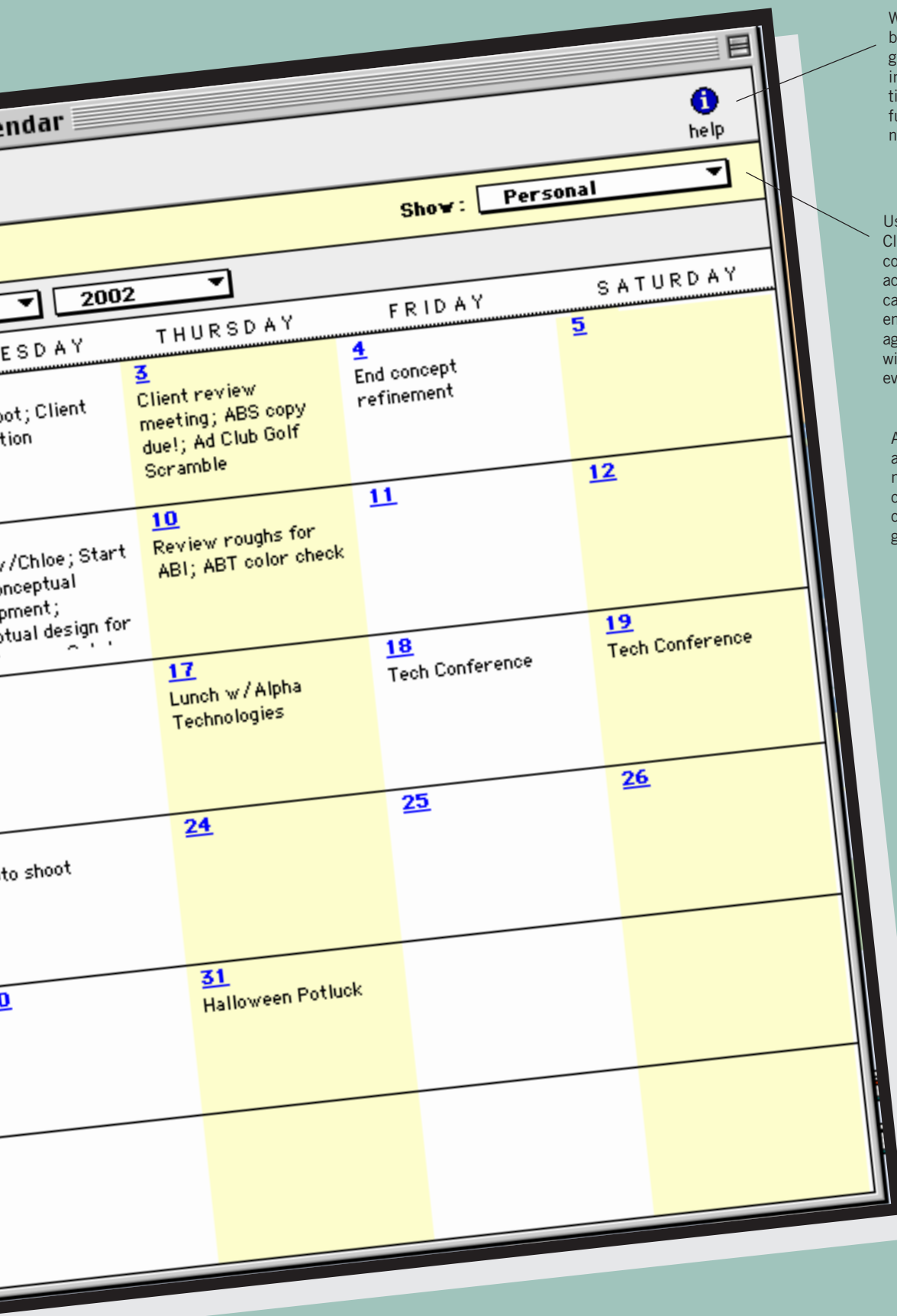
Enter a specific date in the find field to jump to a specific month, or use the scroll toolbar buttons. Once you're done looking at a past or future date, click the [show today](#) link to open the current calendar.

You'll always know which calendar you're viewing. The calendar name (your name if it's your personal calendar) always appears at the top of each month.

Working weekends? You can schedule appointments for Saturday and Sunday, too.

All of the day's entries are summarized on the main calendar, separated by semicolons. To view details about each day's entries, click on the date to open the Day-at-a-Glance window. From there, you can drill down one more level to get even more information about each activity.





Want to know more? Click the **help** button to access the web-based user guide. The new user guide has expanded instructions, descriptions, and explanations of Clients & Profits' features and functions. You'll find these buttons in nearly every window in Clients & Profits.

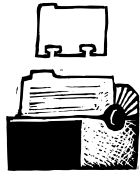
Use this menu to jump to any of the Clients & Profits calendars: personal, company, client, department, media, accounting, and cash. After choosing a calendar, you'll see all of the month's entries entered by everyone in the agency, making it easy to keep up to date with department, client, and company events.

Any calendar entry can be edited at any time, although you can't schedule new entries to past dates. Daily entries can have lengthy descriptions so you can add as much detail as you need to get the job done.

Every Clients & Profits user has their own personal calendar. You can only see your own personal calendar, which should be used to track work-related appointments, deadlines, and other important dates.

Join the FREE Clients & Profits User Group today:
www.clientsandprofits.com/user_group

QUESTIONS AND ANSWERS



Q. Can I “tickle” a reminder about upcoming meeting or events?

Yes. Use the built-in calendars to add daily entries for upcoming deadlines, meetings, or other important events. When you add the calendar entry, choose to be automatically notified by e-mail. Determine the number of days in advance that you’d like to receive the reminder and enter it in the Add Calendar Entry window. The reminder e-mail will arrive in your regular e-mail inbox on the assigned date.

Q. Does the My Calendar window sync with my electronic organizer?

Not yet. The ability to import your personal calendar (and others) to a Palm O/S-based organizer is a currently being developed. We are planning to include the ability to sync the calendar, client contacts, and other data in future updates. Currently, you can add a C&P time card to your organizer and sync it with C&P.

Q. How do I track time spent doing new business when I’m away from the office?

You’ve got some choices. If your shop has My C&P!, the web-based add-on for Clients & Profits, you can use your internet browser to access your database and add your daily time. Or use the Palm OS-based time card. Either way, there’s no reason to wait until you return from recruiting new business to add your time. Remember, when you add time daily, it’s not such a chore, and it’s much more accurate!

Q. When should I use an overhead invoice and when should I use an expense report?

Add overhead invoices when you owe a vendor money for expenses that don’t affect jobs. Overhead invoices affect your agency’s financials, not your job profitability reports. Use an expense report to record job costs that you incur while getting work done.

Employee expenses are assigned to jobs and tasks, so they do affect the job’s profitability. Employee expenses can be billed to the client at their actual cost or marked up.

Q. Can I record my expenses when I’m out of the office?

Yes. With My Clients & Profits! and an internet connection, you can connect to your shop’s database and add your expense report. Expenses added through My C&P! affect your database as soon as you save the report, just like your desktop version of Clients & Profits.

Q. How can I enter a potential job in C&P?

If you’re using Clients & Profits Pro 5, you can enter a

proposal. Proposals record start and due dates, a creative brief, budget, and more.

Once approved, the proposal becomes a job with one click; if you don’t win the new work, you can kill it with one click, too. If you’re using C&P Classic, add a regular job ticket and assign a status code (e.g., 900, for easier sorting). When the job is awarded, change the status code to your “new job” code; if the job is lost, change it to a “lost job” code (e.g., 910).



GUARANTEED GREAT IDEAS!

Account management tips from the Clients & Profits experts

Some of our Clients & Profits consultants share their tips for better, long-term client relationships:

Focus on teamwork “When developing new business, remember that the client’s first experience with the AE cements a lasting perception of how the agency will handle the account,” says Donna Lynn Johnson. “In just a few minutes, the client will be able to assess how well the agency works as a team—and how well it can manage the new work. Even the best AE can’t camouflage a disorganized agency team. If you want more clients—and to improve your product—work on building a team that communicates well, performs responsibly, and keeps focused on the client’s needs.”

Share the job’s schedule “An agency that I work with had recent problems ensuring their client made their mutually agreed upon deadlines,” says Mike Wonnick. “The client often cited that they were unaware of the deadline or didn’t recall the conversation setting the due date. To overcome this, the agency now provides a detailed schedule for jobs with client tasks and due dates that are approved by everyone at the job’s start.”

Recap and report “Tell clients what you did, then ask how you’re doing,” says Bill Kimball. “Dozens of agencies are knocking on your client’s door. Remind them how wonderful you are with a monthly letter recapping progress, issues, and observations. (C&P’s Job Diary is a great tool for this.) Then ask for feedback on jobs and overall agency performance. If you suspect serious problems with your client relationship, get senior agency management (or even a third party) involved to address issues and mend fences.”

Take notes “The client diary and the job diary are the best for CYA (‘cover your agency’) notes,” says Cindy Weston. “Enter daily/weekly happenings, changes, correspondence, phone calls, etc. It will help you remember why the job took so long, why the costs are so much higher, and, even years later, how to recreate the job more efficiently.”



PROSPECTING JUST GOT EASIER

By Mary Peczeli



Creatives and suits alike agree that winning new work is exhilarating: it opens the doors to a new revenue stream and triggers fresh creative. It lets everyone do what they do best. Clients & Profits keeps track of the details so you can focus on winning new business.

Know who to call. When you add a new prospect to Clients & Profits, give them a status of "prospect," "hot lead," or whatever best describes their status. (You can update the client's status at any time.) When scrolling through the client records, you can filter by client status code to focus on one type.

Enter as many individual contacts as you need, each with a unique address, phone, e-mail, and more. Plus, add a few notes in the tickler field, and you've got a database full of relationship-building tips.

Know what happened and why. Make an entry in the call log to jog your memory about what was said in phone calls, meetings, and other communications. With a

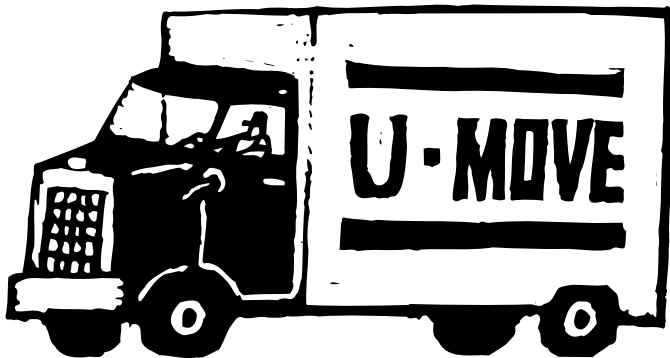
master list of subjects, you can analyze the history and develop a strategy to take clients to the next level. For example, if the prospect frequently expresses concern about their competition, you might sell them a competitive analysis, or address that concern a brochure that capitalizes on the client's unique strengths.

Know when and how. Schedule your follow-up letters, phone calls, and e-mail using the Sales>Maker. Each campaign needs one generic set up and can be scheduled as many times as you need, generating follow-ups on a regular basis.

Schedule everything you want to do to win a new client in the client calendar. Each client has their own calendar, and you can add as many entries as you need for years in advance (hopefully it won't take that long!).

With tools built into Clients & Profits, you'll always be in the know about your leads—and prospecting will be a breeze!

Mary Peczeli is a senior member of the Clients & Profits Sales department.



Top 10 tips for better results from e-mail blasts

Ever wished your sales e-mails got more response? Get them noticed—and get results—with these top 10 tips:

1 - Make the subject line short and to the point.

If the subject doesn't fit in a standard e-mail subject column, it's too long. Also, avoid hype words like "free" and "new." Exclamation points trigger a quick trip to the trash.

2 - Make the message content relevant. Your recipients are busy, so don't waste their time.

3 - Use short paragraphs and bullets for quick scanning. Readers are likely to spend a few seconds skimming content for interesting news, but they'll hit the Delete key before wading through paragraphs for something useful.

4 - If the message is long, include an index with HTML links. Clicking a link lets the reader jump to relevant subjects.

5 - Use HTML format instead of rich text. Some people still use slower connections and will quickly unsubscribe if their inboxes and servers get clogged.

6 - Don't embed graphics. Again, they can slow down your reader's system.

7 - Be courteous. Thank the recipients for reading your note.

8 - Include links to download more information, instead of sending attachments.

9 - Send the message from a "real" person, not an anonymous "sales@agency.com."

10 - Include a working opt-out link. It's not just a good idea; it's the law.

MANAGE ACCOUNTS BETTER (con't)



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Remember, success isn't about doing what needs to be done. It's about doing what needs to be done right. If that means tapping external resources, then get the best ones you can find. You can assemble a group that functions well as a team with your agency in the starring role. After all, the client is *your* client, and *your* agency is the driving force behind the great new work underway.

The result is three-fold: you have a stronger relationship with the client, the client gets a better product, and your agency has a better rapport with external team members. It's a win-win-win situation.

Open your toolbox

Providing superior client services doesn't

have to be hard, especially with a little help from Clients & Profits. You'll find sophisticated client management tools at your fingertips, along with the reporting you need to prove your value to your clients.

The newly redesigned client windows in Clients & Profits 5 lets you enter thousands of active clients, hot leads, and potential prospects along with all of the contacts who make the important decisions.

Each client contact contains useful marketing information that can be used by the Sales>Maker for developing customized follow-up sales campaigns involving sales e-mail, letters, and telephone calls. Use the tickler field for personal notes then refer to it just before phoning a client or stopping by for a meeting. You'll have a ready-made hook to start a comfortable conversation—and it puts you miles ahead of the guy who can't remember a thing.

Reports to prove your point

Take along (or e-mail) any of the dozens of reports from Clients & Profits that show your clients you're on the ball. To win new

jobs, for example, use the On-Time Performance report to show that your shop will indeed get the job done on time (of course, if your on-time performance isn't a source of pride, you might want to consider a different report.)

Another good report to share with your clients is the Job Timeline. This report is a graphical representation of what tasks will be performed at what time. The client will be able to see when your shop is working on tasks that require their input and approval so they can stay on track, too.

(For more useful reports you can share with your clients, see page 3.)

Whatever tools you use, the key is to build strong relationships with your clients. That strength will carry new jobs into your shop with very little effort, leaving you more time and energy to develop new associations with up-and-coming clients.

Judith Hector is the director of marketing for Clients & Profits. She coedits the quarterly newsletters.

CLIENTS & PROFITS is job production and accounting software designed especially for creative businesses. Since 1986, more advertising agencies have chosen Clients & Profits over any other agency management software for Macintosh and Windows. Over 2,600 ad agencies, graphic design firms, and corporate marketing departments use Clients & Profits to track jobs, costs, and billings every day. For more information, send email to sales@cnp-x.com

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