

How Advertising Agencies Manage Clients - 7 Steps

Managing clients is one of the significant challenges in operating an advertising agency. It's a delicate challenge. Sometimes, or probably most of the time, one mistake is all it takes for an agency to lose a client instantly. So, if you're thinking of opening an advertising agency, learn how to manage clients first. And we're going to help you with that. In this blog, we'll walk you through the seven steps on how successful advertising agencies manage their clients.

Settle Contracts and Agreements

The first interaction between an ad agency and a client is when a client contacts the ad agency to inquire or avail. It could be through call or email. But, their first actual face-to-face meeting is when they're settling a [contract](#) or [agreement](#). In this meeting, a representative from the agency will discuss important terms with the client. That includes the schedule of deadlines, [quotation](#) prices, budget allocation, and many more. The representative might use a [meeting minutes](#) sheet to document the negotiation.

Contracts ensure that both parties will do their part in the partnership. From the agency's perspective, it ensures that the client will pay the exact amount for the rendered services. And from the client's perspective, it gives him or her the assurance that the agency will deliver quality output on time. Those are just two of the multiple reasons why there should be a contract. But simply put, a contract solidifies the relationship between the agency and the client, enabling both parties to benefit from each other harmoniously.

Without a contract, there will be risks that can derail a project. If client disputes occur, the agency could lose resources and assets without some sort of compromise. For that reason, it's the agency that enforces contract signing for [risk management](#) purposes.

Facilitate Accounts

Advertising agencies handle multiple clients at once. That's why each of them has an account management team. The account management team, headed by an account director, facilitates the client accounts. These accounts contain complete information about each client's project, requirements, payment records, and other essential data. They update each account promptly so that the advertising teams will have timely info about the clients.

Thanks to modern digital tools, facilitating accounts became convenient. Ad agencies have been using account management programs to archive and curate client records with ease.

Schedule Briefings with Clients

An ad agency can't begin working on a project without briefing with the client first. It's the client's needs and goals they have to meet. So it's important to schedule a briefing session with a client.

During the briefing, the agency's advertising team will mainly discuss the components of the client's business, particularly the products and services. With the client's involvement, they typically [conduct a market analysis](#). It allows them to understand the behavioral patterns of the target consumers and the competitors' tactics. That gives the advertising team ideas for strong [marketing strategies](#) to promote the client's business successfully.

It's during the briefing that the advertising team can set an objective checklist. The objectives are per the client's business goals. It's also during the briefing that a client will know the agency's action plan to meet his or her demands.

Control Client Expectations

One of the planning and management measures of ad agencies is controlling client expectations. Yes, it's a must for agencies to meet their clients' expectations. But sometimes, those expectations are impractical, unrealistic, and infeasible. In that case, the agency has to tweak them. They usually do that by submitting a proposal for better alternatives, with detailed explanations and supporting facts. Some clients might not like it, but the agency must let them understand.

Controlling client expectations is an essential process for smooth-sailing operations. Unachievable client expectations and goals will lead to nowhere, but suboptimal results or failure.

Communicate Continuously

As a project progresses, ad agencies keep their clients involved by communicating with them continuously. Because clients won't be with them in person all the time, they usually communicate through email or phone. They constantly update their clients

regarding a project's status, especially if there are any breakthroughs. The clients receive updates from them in the form of a written report or memo.

Consistent communication will give clients the impression that the agency genuinely cares for their business goals. Other than that, it enables them to express their comments when needed. Moreover, continuous communication is one way to build trust and nurture good relationships with clients.

Review Campaigns with Clients

Once advertising projects are complete, the agency and the clients will post them on various media platforms. From there, they'll await results. When the results start showing up, the agency will schedule a thorough campaign review with their clients. Together, they'll assess the effectiveness of the ad campaign and implement adjustments if necessary.

Much like communicating continuously, this approach makes the clients feel that the agency wants to achieve perfection as they do. Campaign reviews will most likely be in place weeks or months after a project's release.

Retain Clients

Once the contract ends, and the client's ad project is successful, ad agencies don't cut ties from their clients. Instead, they continue keeping in touch with them. Why? That's because they want their clients to hire them again for future ad projects. That approach is called client retention—the process of retaining clients.

The reason agencies do client retention is to optimize their potential profit, which is very true. According to Small Business Trends, customer or client retention can increase profits by 25% to 95%. However, to retain clients successfully, ad agencies must meet the satisfaction of their clients. They need to provide quality service in the first place.

All of these client management practices should be present in your [advertising agency business plan](#). In doing so, your ad agency will become one of the best in no time. When your agency launches officially, make clients its primary focus.