

## How to Improve Ineffective Multi-Agency Planning Sessions

July 24, 2020 by [Jenny Garcia](#)



Whether you take a positive view of working with multiple agencies ("Yay! Everyone's bringing their best to the collective table!") or a negative view ("No! Everyone's trying to take a bigger cut and all the credit!"), multi-agency planning sessions are a challenge.

From the client side, it's hard to keep multiple agencies working together when each of them brings different expertise, experience, and goals. Getting all of your agencies together can take a lot of planning and coordination that consumes time and expenses—two high-demand finite resources. And from the agency side, it can seem impossible to expand your own business while working alongside others that have offerings that overlap with yours, and general confusion about who's in charge of what.

However, the value of using multiple agencies is worth the challenges. [Courtney Buechert shares with AdAge](#) that even clients who have tried to return to single-agency contracts find that working with multi-agency partners is better. "Most of them find that it's hard for one agency to be experts in absolutely everything."

At KPI, we've had the opportunity to represent both the client working with multiple agencies and one agency of many working for the same client. We've found that when the client establishes themselves as the center of directing the meetings (rather than delegating leadership to the AOR), and the agencies all focus on working together to meet client goals, these multi-agency planning sessions can be effective and rewarding.

### Multi-Agency Planning Sessions: What's the Problem?

Clients bring in multiple agencies so they can benefit from a broad range of services and expertise. But those agencies are often competing for the same work outside of the planning session. It's pretty easy to see how difficult it can be to put that aside for a time, only to have to pick up that competition again as soon as everyone walks out the door.

Miscommunication is a very real hazard when multiple agencies are working on the same project, and can damage a brand's campaign and messaging. If the client isn't providing organized and clear communication, each agency tends to interpret information differently, and transmit their goals in a single-agency bubble.

Research conducted by [Observatory International](#) with the World Federation of Advertisers revealed that in multi-agency set-ups, "Agencies found that collaboration could be hindered by internal structures (51%), poor quality briefings (49%), approvals and sign off processes (40%), lack of trained client personnel (40%) as well as lack of a clear data strategy (52%)."

### Client Responsibility

It's really up to the client who did all the agency hiring in the first place to set up a working system for multiple agency planning sessions based on their strategic goals. If they aren't clear about what the agencies are working towards, there will never be cohesiveness within the sessions. The client needs to be in control and set the tone in how agencies prepare with these goals in mind and interact during the meeting. Otherwise, the agencies all tend to do what they want and what's in their best interests.

David Angell for Trinity3 writes about [improving multi-agency output](#). He recommends the client begin with forming a lead group that includes the most senior representatives from each agency. This lead group is tasked with working together to align goals, and the client initiates discussions on how remuneration will benefit all agencies as they work together. In a similar vein, [Observatory International](#) noted the success of a multinational organization that "reduced its roster considerably by consolidating most agency discipline requirements into a single Holding Company model with a simple interface and highly focused multi-disciplined strategic team at its heart to drive integration."

The client must also be the point of arbitration—not the Agency of Record (AOR). If a client leaves dealing with problems/drama to the AOR they are at the mercy of what others do—it's not best for your business. Once you've set the scope for the project, any questions can be dealt with using a basic arbitration process between the client and agency.

Angell also recommends clients use one briefing template that is sent to all agencies at the same time. "Aim for one simple, over-arching brief, which is not overly-prescriptive yet gives the agencies the right parameter to work with."

Does everyone know what everyone else is doing? If they don't, the client has work to do in communicating tasks based on why each agency was brought into the team in the first place.

Clients also need to have the metrics in place to measure results. Every agency needs to know how progress is measured and what the end goals are in specific terms. Alex Yastrebenetsky for InfoTrust tells [Forbes](#) that "Instead of having each agency generate their own sets of reports, [the client] should establish a reporting and measurement framework that all partners should follow."

Finally, clients should be ready to let go of an agency if it becomes obvious that they are not able to work within the multi-agency process. This isn't an indication of a failed agency, but that as Angell describes it, the "chemistry is simply not there... no matter how good the individual".

### How to Structure Multi-Agency Planning Sessions

Effective work with multiple agencies begins before any planning session. Everything the client communicates sets the tone for future sessions. Establish a central cloud for sharing documents and a cohesive communication strategy between everyone involved. [Jennifer Kelly for Search Laboratory](#) quotes an SEO manager who recommends using project management tools to facilitate communication, which encourages open discussion and

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Kelly has eight steps for integrating your marketing strategy with multiple agencies. After sharing your brand tone of voice documents, set up a face to face (or virtual face to face) session to discuss responsibilities, KPIs, and roles of each agency (and how to work through any areas where roles overlap) so everyone starts on the same page.

[Rick Sullivan](#) recommends using the 3-P's (Problem, Process, and People) to structure multi-agency teams. Begin with clarifying the problem and setting aside sufficient resources to attack the problem. The process requires establishing a clear path to the solution. Within an multi-agency structure, this process needs to include progressive workflow stages and "Accountability must be clearly defined for *each stage*, as well as roles and responsibilities, deliverables, communication paths, essential team members and timing."

## Procter and Gamble's Multi-Agency Strategy

The P&G plan had already worked with their Tide Super Bowl campaign, so it was a logical next step to put the full Tide detergent team into a similar set-up. P&G created a small, multi-agency team made of “agencies including media experts, influencer marketing companies and those that specialize in store promotions”.

The new multi-agency strategy has corresponded with P&G seeing \$750 million of savings in agency and production costs, with another \$400 million planned at the time the article was written. P&G also plans to cut the number of marketing agencies it works with by half again by 2021.

Having all agencies working together in multi-agency planning sessions can be the most efficient and effective way to engage creatives, make responsive decisions, and see tangible results within a reduced time frame.

This is the key: the client must know what their strategic goals are before initiating a multi-agency planning session.

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A diagram of a 10x10 grid with a 10x10 grid of cells. The top row is labeled with numbers 1 through 10. The left column is labeled with letters A through J. The grid is divided into four quadrants by a vertical line between columns 5 and 6, and a horizontal line between rows 5 and 6. The top-left quadrant (A1-E5) is shaded light blue. The top-right quadrant (F1-J5) is shaded light green. The bottom-left quadrant (A6-E10) is shaded light orange. The bottom-right quadrant (F6-J10) is shaded light purple.


