

# THE CPI TOP TEN: Broken Agency Processes

*By Vanessa Edwards*

**It's been a wild ride.** The transition from founding, operating and selling an agency into management consulting for the marketing services industry has been full of surprises. We started this journey 5 years ago helping agency owners, principals and executives navigate the ins-and-outs of complex technology deployments, cultural change, organizational change and the transition into process-driven organizations while maintaining their creativity.

This experience has led us to the realization that there are a group of major process issues affecting most agencies, regardless of their size, billings, clients, niche or maturity. Generally, these core issues are masked by a multitude of symptoms disguised as:

- Low profitability
- Burnout
- Toxic culture
- Employee Turnover
- Client churn
- Strategic drift by the management team

The problem is that addressing these symptoms is like a never-ending game of “whack-a-mole” where you never get out from behind the power curve. It sucks. We want to help! To get back in front of the power curve, you need to focus on your underlying process issues, not the symptoms.

In this series of articles, we'll outline what our experience has shown us are the most commonly broken processes within creative and marketing agencies. So that we aren't just crying wolf, we plan on sharing our recommendations for how to fix each of these broken processes with solutions and next steps. Drum roll, please...



## *Our Take: The Top Ten Broken Agency Processes*

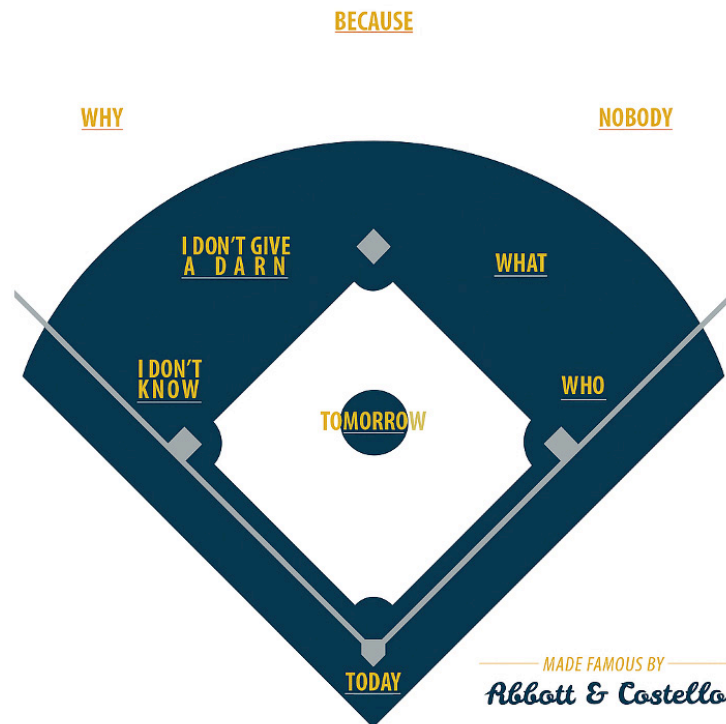
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The ramifications of these broken processes span across the entire agency, but they can be broken down into two main categories: Operational and Financial. These broken processes are in no specific order, and depending upon your agency size, billings, clients, niche or maturity, some of these processes will have a larger impact on your business than others.

So that we don't blow anyone's minds in just one article, we've decided to break up the articles by these two categories of processes, Operational versus Financial. This first article will focus on the Operational Process issues (numbers 1 through 5), and our second article will cover the Financial Process issues (numbers 6 through 10). Then, in two follow up articles, we'll share our thoughts and recommendations on how to solve all ten of these broken processes.

Let's get started.

## Agency Workflow: Who's on First?



The famous Abbot and Costello "Who's on First" bit just never gets old, does it? You know when it does get old, though? When you're talking about your agency's workflow processes.

Workflow defines your agency's process for doing work for your clients. It's the who, what, when, where, why and how of client work, including scoping, initiation, planning, strategy, research, concepting, creation, presentation, revisions, delivery and close out.

But when your Agency Workflow isn't well defined (or even defined at all!), isn't aligned with your creative process, and/or doesn't include the proper checks and balances, your team ends up looking like Abbot and Costello doing the "Who's on First" bit:

**TEAM MEMBER 1:**

*"Who's doing the creative brief?"*

**TEAM MEMBER 2:**

*"You got it."*

**TEAM MEMBER 2:**

*"Who."*

**TEAM MEMBER 1:**

*"What?"*

**TEAM MEMBER 1:**

*"That's what I'm asking... who's doing the creative brief?"*

**TEAM MEMBER 2:**

*"No, What's writing the copy."*

## **Ever experienced something similar? Could be that your agency workflow process is broken or key sub-processes within your workflow are broken. Here are some of the most common issues we've seen resulting in broken Agency Workflow:**

### *a. One Size Fits All Workflows*

Maybe you do have a great Agency Workflow defined...but if it's a "one size fits all" workflow, then you're sure to experience workflow pain.

Not all accounts fit in the same workflow. The workflow for an Agency of Record client is different from the workflow for a Retainer client, which is different from the workflow for program/campaign clients and different still from the workflow for project-based, one-off clients. There are core-differentiating factors within each one that require different checks and balances for success. For example, the timing and scope of the planning and strategy phase for an AOR client is very different from the timing and scope of planning and strategy for a project-based client. Another example would be the estimating and approval steps; rightly so, these steps for AOR engagements would be very different from the steps for program/project engagements.

When your Agency Workflow doesn't take into account the unique factors of these various types of accounts, it can feel like trying to fit a square peg into a round hole. You try as hard as you can but it just won't fit, which results in a breakdown in communication, missed deadlines, forgotten deliverables, and duplication of effort. Often, this feels like everyone is rowing – but at different speeds and in different directions; you might eventually get to where you were headed, but it was a pretty rough ride and you may have lost a few overboard along the way.

### *b. Not Designing Sub-Workflows by Project Type (Project Architecture)*

It's not enough to define and document Agency Workflows for your agency's various types of accounts; you have to take it one step further by defining and documenting sub-workflows for each type of project your agency produces (e.g. Print Collateral, Website, Email Campaign, Video Shoot, Radio Spot, etc.).

Defining these sub-workflows (which we call Project Architectures) allows you to incorporate the unique checks and balances, at a detailed level, that affect each of these project types once work begins. Taking your workflow down to this detailed level gets everyone on the same page, sets a baseline for the project flow, clarifies responsibility for each task, and creates alignment across team members.

### *c. Workflow Not Aligned with Your Creative Process*

One of the most common issues we see when agencies develop their workflows are that they forget to align their workflow with their creative process. It doesn't do your agency any good to define an Agency Workflow or Project Architecture that doesn't match up with the way your creative team works.

We see a lot of agencies that set workflows by defining the steps to complete certain projects without checking in with the people who actually do the work. Doing this often results in getting the steps out of order or not including the right people in each step, which can lead to duplication of effort, increased routing and reviews, or decreased product quality – and often leads to low adoption rates.

### *d. Not Including Checks and Balances*

When you go through the process of defining your Agency Workflow and Project Architectures, it is imperative that you include checks and balances throughout the entire flow that support and reinforce your agency roles + responsibilities.

Your workflow should include who is responsible for each part of the process so that there is no ambiguity or issues of accountability for who owns each task or step in the process. However, it's not enough to just assign responsibilities; they need to be assigned in a thoughtful way that maintains a healthy Balanced Tension between The Work, The Client and The Agency's Needs.

If your workflow doesn't include these checks and balances to reinforce this healthy Balanced Tension, you'll likely find that projects still don't flow smoothly, you may experience delays or missed reviews/approvals, or there may be too much emphasis placed on one aspect of the Balanced Tension triangle (usually towards The Client or The Work).

# The Scoping Shockwave



We've seen this occur time and time again at agencies: during the business or client development process, projects are scoped inaccurately without input from the right team members and discounts are offered without clear expectations, communication or sometimes approval!

Under scoping, scoping in isolation, not gathering input from subject matter experts, reducing price without reducing scope...all of these contribute to major breaks in the business development process, which results in disasters down the road, not immediately. Because most agencies don't feel the pain of broken business development processes in this phase, they often don't think they have a business development problem – but we're here to tell you that many agencies DO.

Have you ever managed a project that was set up to fail before it even started? Have you ever read a signed proposal and thought, "Crap! How are we going to deliver that!?" How many times have your SOW's included capabilities that you don't actually have in-house and couldn't ever hire out for the price they were sold for? How many times have you gone through 13 rounds of revisions and wanted to yell at someone because rounds of revisions were not documented in the SOW? Have you ever had to manage a project to an unrealistic, discounted amount? Here are the most common business and client development process mistakes we've encountered within agencies:

## a. *Client Advocates Scoping Work*

We see plenty of situations where Client Advocates scope projects into their client's budget dollars – without full consideration for how much it'll actually take the agency to deliver the work. You're setting the project up to be over budget and below target profitability/ margin before the project even begins.

When your Client Advocate is the one doing the scoping, they'll lean towards wanting to do everything possible to increase the value/ ROI of the client's program, which may or may not be within the client's budget. This often leads to under scoping the work to fit the client's budget, resulting in unanticipated resourcing and load balancing needs.

## b. *Scoping in Isolation*

Whenever anyone – a Client Advocate, Project Manager, Principal, or Subject Matter Expert – scopes alone, without any input from other team members, things go south...fast! Scoping in isolation leaves room for large mistakes; even the best scopers should have a second or third set of eyes on their estimates, proposals and SOWs to vet the price, hours, rate, margin, scope of deliverables, timing, etc.

## c. *Mismanagement of Principal/Executive Investment*

Often, discounts are given to clients for a variety of reasons – to win a project with a marquee brand, to break into a new industry, to cut your chops on a new capability, etc. However, these legitimate reasons for offering client discounts are often mismanaged by agency principals and executives who expect their team to get the work done for the discounted amount rather than acknowledging that they're making a Principal/Executive Investment in that client relationship.

Additionally, most agencies don't measure these discounts and are often unaware of how many combined dollars are being given away by different Principals/Executives. This total opportunity cost, if mismanaged or misdirected, can be quite substantial and can have a severe impact on agency profitability.

#### *d. Poor Risk Analysis/Assessment*

Another common issue we see is when agencies have poor – or no – risk analysis/assessment processes in place during the business development phase. Often, agencies don't protect themselves well enough in their agreements and they open themselves up to unrealistic or unclear expectations from clients.

Even if you have planned for risk, if you haven't done a good job of communicating the project requirements (e.g. milestones, rounds of revisions, scope change threshold, etc.), it may be difficult or impossible to enforce without damaging the client relationship.

## *Over Servicing and Over Delivering*



There is a trend in the agency industry of giving away Filet Mignon for the price of hamburger – and I'm not talking about a Kobe burger, I'm talking good old-fashioned ground chuck. Pretty much every agency we've ever worked with has had to deal with this problem: they sell a client on a hamburger and then deliver them Filet Mignon for the same price. We call this Over Servicing and Over Delivering, and it's one of the most rampant process issues affecting agencies today. Once this habit permeates your culture and takes root, it is almost impossible to break, even with accurate scoping and strong budget to actual management processes.

Now, don't get us wrong – there's something to be said for under promising and over delivering; there are plenty of ways to do that correctly and profitably, but unfortunately, most agencies don't even recognize that they're doing it. We've seen many agency cultures where the internal expectation is to always deliver 10 concept ideas, even if the agreement is only for 3; or where the team just doesn't feel right about only delivering what is in the agreement, and is determined to deliver extra work above and beyond the signed SOW.

Do you have team members who pride themselves on delivering beyond scope, regardless of the budget? How often do you come in under budget on a project and give away your efficiencies by doing extra work? Are you properly staffed according to your forecasted revenue and agency KPIs but everyone still feels overworked and understaffed?

This is a slippery slope for an agency. Pretty soon, you set the expectation that Filet Mignon should only cost \$10.99, training your clients that for less than industry pricing, they can get amazing amounts of work. You may also be setting the precedent that you'll do out of scope work at little to no charge, making it very difficult to ask clients for additional budget dollars.

All that time you're spending giving away free work could be spent on really fulfilling, extra creative pro bono work or internal initiatives to advance your agency (which always get back-burnered!).

When you have a culture of Over Servicing and Over Delivering, the agency is unable to take on additional contracts without hiring more staff. Not to mention, the agency isn't even getting paid for all the time spent Over Servicing and Over Delivering. This can become a downward spiral of profitability that negatively affects agency culture, leading to employee burnout and high turnover.

## Resourcing Pains



Resourcing tends to be the most pain-inducing process in any creative agency. When asked what their #1 issue is, most agency owners, principals and executives would probably respond with “Resourcing!”

Do your team members feel over worked? Are your Resource Managers unable to properly load balance? Are you having a hard time forecasting workload swings and dips? All of these resourcing pains are often not really resourcing problems...they are often Scoping or Over Servicing/Over Delivering problems.

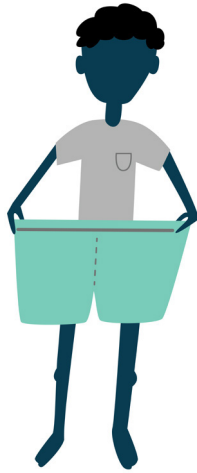
This is often a result of the Scoping Shockwave discussed above; under scoping, scoping incorrectly, spending extra hours Over Servicing, allocating to discounted contract amounts instead of tracking Principal/Executive investments ...all of these create a shockwave that isn't felt until work begins and suddenly people have to stay late or work on the weekends. We have found that agencies that address their Scoping and Over Servicing problems tend to have significantly fewer true resourcing issues.

True Resourcing issues significantly multiply as agencies grow in size; when you're no longer able to yell across the room or walk down the hall to easily talk about edits or deadlines, agencies need to find new ways and systems to address timely communication of critical project information. As you get bigger, that whiteboard resourcing just doesn't work anymore. We find that most agencies using resourcing technologies often don't set them up to align with their workflow and creative process, resulting in inefficiencies, inaccurate data, and knee-jerk outsourcing.

Also, if your agency doesn't have well-defined, detailed sub-workflows (Project Architectures), then accurately resourcing, even with a strong technology, is almost impossible. Without a clear picture for the process that should be followed or detailed steps that outline each phase, you won't be able to effectively resource the work that needs to get done.

Another issue that causes breaks in the Resourcing process is not having a discrete Integrated Project Management Discipline. If you've read our past blogs and articles, you'll know that this is something we feel strongly about: Integrated Project Management is crucial to an agency's success, especially as it relates to Resourcing. Without a dedicated PM Discipline, it is difficult to manage and maintain project schedules; often, tasks don't get updated, schedule dates are inaccurate, assignments aren't updated, and tasks aren't marked as completed, resulting in inaccurate staff scheduling and an inability to balance the workload.

## Briefs: Are Your Briefs One Size Fits All?



One of the most broken processes we've run across surrounds agency Briefs – called Project Briefs, Program Briefs, Campaign Briefs, Creative Briefs, Spec Sheets, etc. With as much hoopla as there is around Briefs, how is it that they still don't get filled out correctly or at all? Maybe it's because there's one form called three different things within the same agency, or three different forms all referred to by the same name. This is a constant point of confusion and misunderstanding between internal team members, as well as with clients.

### a. *Unisex Briefs*

When it comes to your agency's Briefs, it's not about size; it's about fit. Having one Brief that fits all types of work just doesn't fly. When you only have one Brief, you have to include every possible question that might ever need to be answered for every type of engagement. This just makes it incredibly difficult to know what to fill out and what to leave blank, and often results in missing critical information necessary to not only DO the work, but to hit it out of the park.

Briefs should be designed to make your team successful in solving your clients' business objectives. If your Briefs aren't designed well – either with too much detail, not enough detail or the wrong detail – then you won't be able to capture the critical insights that should be the North Star throughout your creative process. Poorly or partially filled out Briefs can cause agencies to completely miss the mark on client deliverables, requiring work to be redone, often at the agency's own expense.

### b. *Sharing is Caring*

When it comes to filling out the Brief, our experience is that there's usually one of two scenarios within an agency. Either one person owns the Brief, but doesn't have enough data, experience or insight to fill it out accurately; or, too many people share the Brief process but no one person has ownership for driving it to completion, so it ends up as a shared task with no accountability.

Agencies struggle with who should fill out the Brief – should it be Client Services, Project Management, Creative, Strategy, or the person who sold the work? Or maybe a combination of all of them? Agencies who don't have clear processes around who fills out what part of the Brief often end up with an incomplete, ineffective and valueless Brief, forcing your team to make educated guesses on the fly that may or may not be on the mark.

On the flipside, if there isn't a clear owner responsible for driving the Brief process, it might not get done or it might get done poorly, both of which can have disastrous results. While a broken Brief process is not difficult to fix, the consequences of not addressing the problems are extremely high and can result in loss of client relationships.

### c. *Client Delivery + Sign Off*

Another muddy area is client delivery of the Brief; there is often massive confusion about when to send the Brief to the client, or if you should even send the Brief to the client. Do we send it before we kick off the project, or do we need to kick off the project with the team to figure out how to fill out the Brief? Do we expect our client to give us edits or feedback on the Brief, or is it more of an FYI for the client? Do we need a client signature on the Brief? We challenge you to ask your team members these questions; We're guessing that if you ask 4 team members, you'd get about 6 different answers or the words "It depends."

The lack of clarity surrounding the Brief process in agencies can be a major roadblock to project success; if there's miscommunication before the project has even begun, how can we possibly expect the project to run smoothly – on time, in scope and on budget?

**We hope that wasn't too tough. Stick around for the second installment in this article series where we'll talk about the major financial processes that are broken at many agencies. Rest assured, we'll also deliver "the Filet Mignon" of solutions to all of these broken processes.**

## About the Author:



Vanessa Edwards is a serial entrepreneur, professional jet pilot, former agency owner and founder of Creative Performance Inc, a consultancy that empowers agency owners to achieve their cultural, operational and profitability goals. As a FunctionFox, Workamajig and Oracle PLM partner, she has helped over 100 marketing services organizations (agency + brand) through large-scale organizational change, complex technology deployments and strategic planning.



Contributing Author: Jessica Stephens

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☎ 866-578-8611 ✉ [info@cpi.consulting](mailto:info@cpi.consulting)  
🌐 [cpi.consulting](https://cpi.consulting)