

# Designing creative agency-client relationships

A strategy to build lasting  
relationships for impact

Master thesis

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# Preface

Dear reader,

Welcome to my thesis. I wrote this thesis as the final part of my 2 year Master program in Strategic Product Design. The project took place over one semester and for me, a lot has changed since its commencement. With the pandemic it has been a completely new challenge to approach an individual project over such a long duration in a profession which thrives on working in close collaboration with others.

Therefore, I have my team to thank in helping me through the past semester with feedback and coaching. My team consisted of Rebecca Price and Giulia Calabretta, who decided to take me on as a graduation student even though their schedules are so overbooked already. The advice I got from both of them helped me achieve the lengths that I did in this project.

Besides their coaching I was fortunate enough to have worked with Unplugged. This small creative agency in Amsterdam made me feel at home in a way that I couldn't have expected. To have spoken with everyone and gotten to know them a little in these times was great. The heads even taking the time to meet with me and show true interest in the results allowed me to strive for implementation. However, the person who helped me throughout my entire project with connections, tips and discussion is Stein. Therefore, I would like to thank her for having pulled me to the office once in a while and checked in on a regular basis! It was fun to work with her and my graphic design is better for it.

As I went through this project individually, I did have a couple sparring partners along the way to help me out. My parents, friends and girlfriend helped me with the project and getting through the past months in general. It has been great to discuss the work with all of them.

I hope you enjoy reading this!

**George**



# Executive summary

The relationship between creative agencies and their clients is a difficult one to manage. For clients, the methodologies and processes applied by creative agencies often lack sufficient transparency; so much so that working together needs to be subject to a carefully thought-out process. While agencies recognize the importance of such transparency, the implementation of said transparency remains a difficult characteristic to master.

In order to address this gap, the work performed in this project puts forward a strategy to approach both creative agencies' client relations and their work in such a way that lasting relationships can be built together with clients for optimal growth and building towards an agreed vision.

To develop this approach, the literature on Service Design was first reviewed followed by that on leadership and creative agency-client relationships: the first because it is the specialization at the Service Design agency Unplugged; and the second because to be an agent of change the creative must lead the way. The derived insights brought to light different typologies of clients, relationships and scopes. From this foundation, three impact levels were identified, namely: organizational transformation, organizational process and organizational service.

Conducting interviews at Unplugged, with its leadership and creatives and clients generated data and insights on the situation or problem space as it exists for the agency. The combination of the problem space and the knowledge gathered from the literature and the discussions with experts enabled the creation of a strategy playbook. The playbook is built around six principles for the day-to-day practice of and development of thriving client relationships. In order for the creatives to live by these, question cards were developed which correlate with the six principles to give creatives a reference point throughout their projects. Furthermore, to measure progress and maintain focus on project goals, two impact portfolio graphs are included. Finally, to ensure integration of the strategy playbook, a workshop has been designed for defining the purpose of the client interaction and applying the principles and tools by using them through fictitious scenarios.



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# Project

In this chapter the introduction, context and approach of the project are described. These set the scene for the project work to come.

## 1.1 Introduction

The creative agency landscape emerged decades ago when the necessity for appealing to customers was uncovered. The rise of freedom and wealth gave way to customers being able to start buying what they wanted. More and more companies selling products to customers emerged and the amount of competition kept rising.

The first creative agencies were seen in the advertising industry as these form a direct line of communication from an organization to its customers (Wlosik, 2020). Later product design agencies started helping with the development of more human-centered product development (Goldense, 2019). More recently, with the boom of the service industry, more and more Service Design agencies are popping up (Catalanotto, 2020). These are in demand because they provide the opportunity to hire experts for a specific task without needing to onboard them. They also provide a different, external perspective as they do not work within the company which is optimal for them to offer novel insights.

As the demand for creative work grew to industrial levels of production, the need for structure and methodology in work practices grew with it. This had the added benefit that these methodologies allowed organizations to conduct methods for business performance themselves. That is when creative agencies started teaching the application of design approaches, methods and tools so that organizations could innovate independently.

To stay ahead of the curve, organizations need to keep innovating. Setting up an innovative mindset and organizational culture to make the company as a whole more innovative, led to the creation of the Chief Design Officer position. As a result, now there is a position in the c-suite focused solely on the creative lens of the organizational system, and related processes and contact points within their client organizations. This function's competences range from branding the entire company to creating the service offering experience. McKinsey shows well the correlation of design impact and increased growth in revenue and return as seen in figure 1 (Sheppard et al., 2021).

The rise of creative agencies, coupled with the growing understanding of their potential, means an increase in competition between agencies. Therefore, the agencies are having to find their own ways to differentiate. Where some will do so through their specialization others will do so through their approach or in the tools they use to get the job done. Most of the agencies rely on their reputation, which is based on the opinions of their past clients. Indeed, being able to build and manage relationships with clients has a major influence on an agency's reputation (Northen, 2014). However, the art of building such relationships is often not directly taught. And yet this is crucial as the design field and creative agencies specifically lack transparency for clients (Dalrymple, 2021). Thus, this calls for a strategy for developing and nurturing creative agency-client relationships.

Companies with top-quartile McKinsey Design Index scores outperformed industry-benchmark growth by as much as two to one.

Annual growth (normalized), %

— Top-quartile McKinsey Design Index performers  
 ■ Industry benchmarks<sup>1</sup>

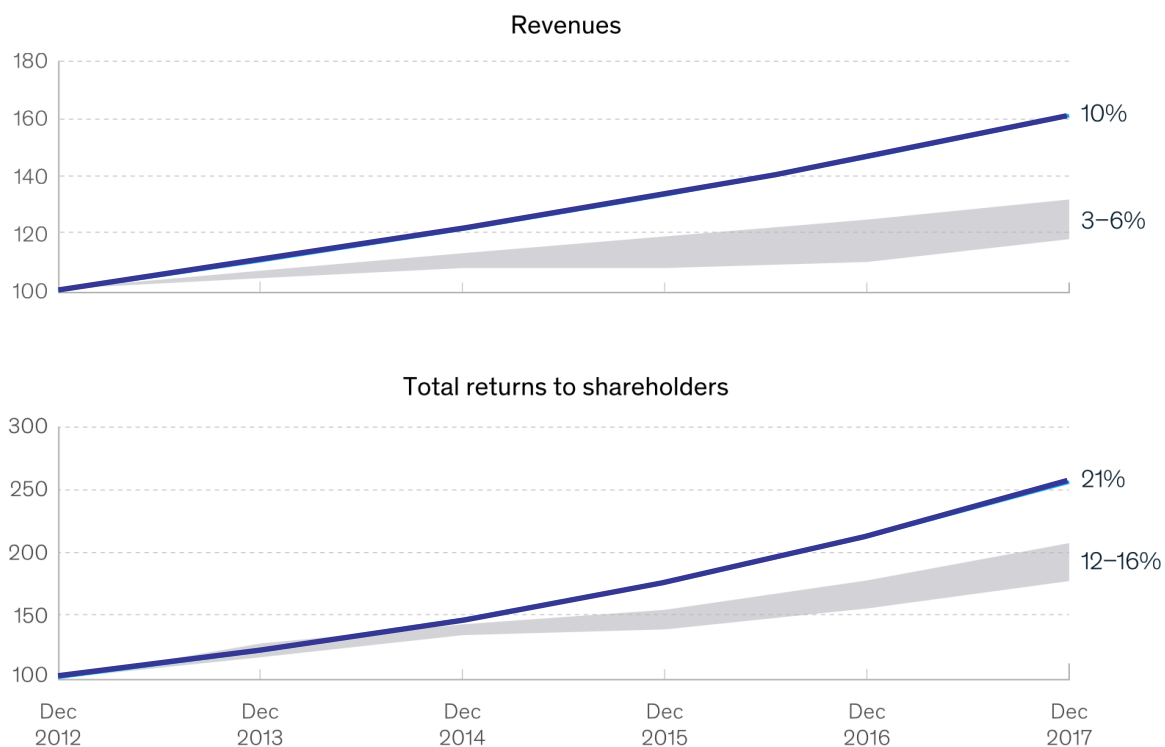


Figure 1: The impact of design on growth in revenue and shareholder returns

## 1.2 Context

To study the creative agency-client relationship, the project was performed in collaboration with the creative agency Unplugged. It is therefore useful at the outset to note Unplugged's context as this constitutes an important basis from which the strategy is developed. The agency is relatively young (existing for 4 years and, at the time of writing, amounting to 15 people), though part of a larger affiliate called Makerstreet which is growing at about 20-25% a year. Unplugged is slowly becoming more independent with both behavioral research and Service Design propositions; the former entailing the uncovering of in-depth knowledge about the conscious and unconscious values and needs of client customers; the latter representing the redesign or creation of services to enable the client to cater to their customers' uncovered values and needs. This combination of expertise and focus is what differentiates Unplugged from the other agencies within Makerstreet and enables them to work together between agencies. That is what Makerstreet calls "full-specialism".

Now that Unplugged is becoming more independent, there are two new propositions that they offer aimed at helping the client with its innovation and strategically representing the voice of the client's employees or customers. Unplugged is starting to do its own client acquisition and aims to increase the continuation of projects with clients beyond behavioral research towards a more long-term advisory role. By developing this way, it is seeking to better understand how to optimally manage its client relations so as to maximize retention and impact, objectives which perfectly align with the purpose of this specific project. It is also seeking to address challenges which Unplugged is facing, relating to an imbalance of designer autonomy versus client conformity. Its clients have a tendency to show a controlling attitude over the project which diminishes the quality of the outcome. This, combined with a lack of client understanding for the value that Unplugged delivers, causes the clients to under appreciate Unplugged's capabilities and potential to provide value.

This discrepancy in perspectives between the agency and the client needs to be resolved. Working out issues such as unclear agency identity, added value and roles is centrally important to the agency's development. As Unplugged starts to build its own client relations from the ground up, this will allow them to create lasting relationships with a higher level of influence, if thought through and done deliberately. The purpose of this project is to create a strategy which enables creative agencies to advance towards their vision by consistently curating lasting relationships for the expansion of impact.

## 1.3 Approach

To tackle these issues the Double Diamond method is applied as shown in figure 2. This method is optimally suited for the project as it allows for the discovery and definition of the problem space which is necessary due to the unclarity of what is causing the issues Unplugged is experiencing. The consequent phases allow for the generation of a solution through ideation and iteration. Creating the opportunity to tailor the advice to Unplugged while remaining relevant to creative agencies around the world.

First, the discover phase is used to gather information on the context that Unplugged works in. This is done by conducting semi-structured interviews with the team, the heads and the clients. The interview guides created from a literature review on the topics Service Design, Leadership and agency-client relationships. Furthermore, the designers will be given a timeline to fill in as to be compared with the information from the interviews.

Second, the define phase commences with the transcription and then synthesis of information. Resulting in a relational network of clusters, which as a whole constitute the context and problem space of Unplugged. This being representative for the context in which many creative agencies find themselves.

Third, developing a strategy that will alleviate these issues and delineate an approach to client relation management that enables creatives to maximize their impact. The input for the strategy playbook will not only come from ideation but also researching business partnerships and discussions with five consultants from different fields. These consultants have managed client relationships for a substantial amount of time and can therefore provide insight into what has and hasn't worked in practice.

Fourth, the final strategy playbook will be delivered through a workshop to make the advice clear and actionable. To create that final version, several iterations will be made based on feedback from the team and the heads at Unplugged.

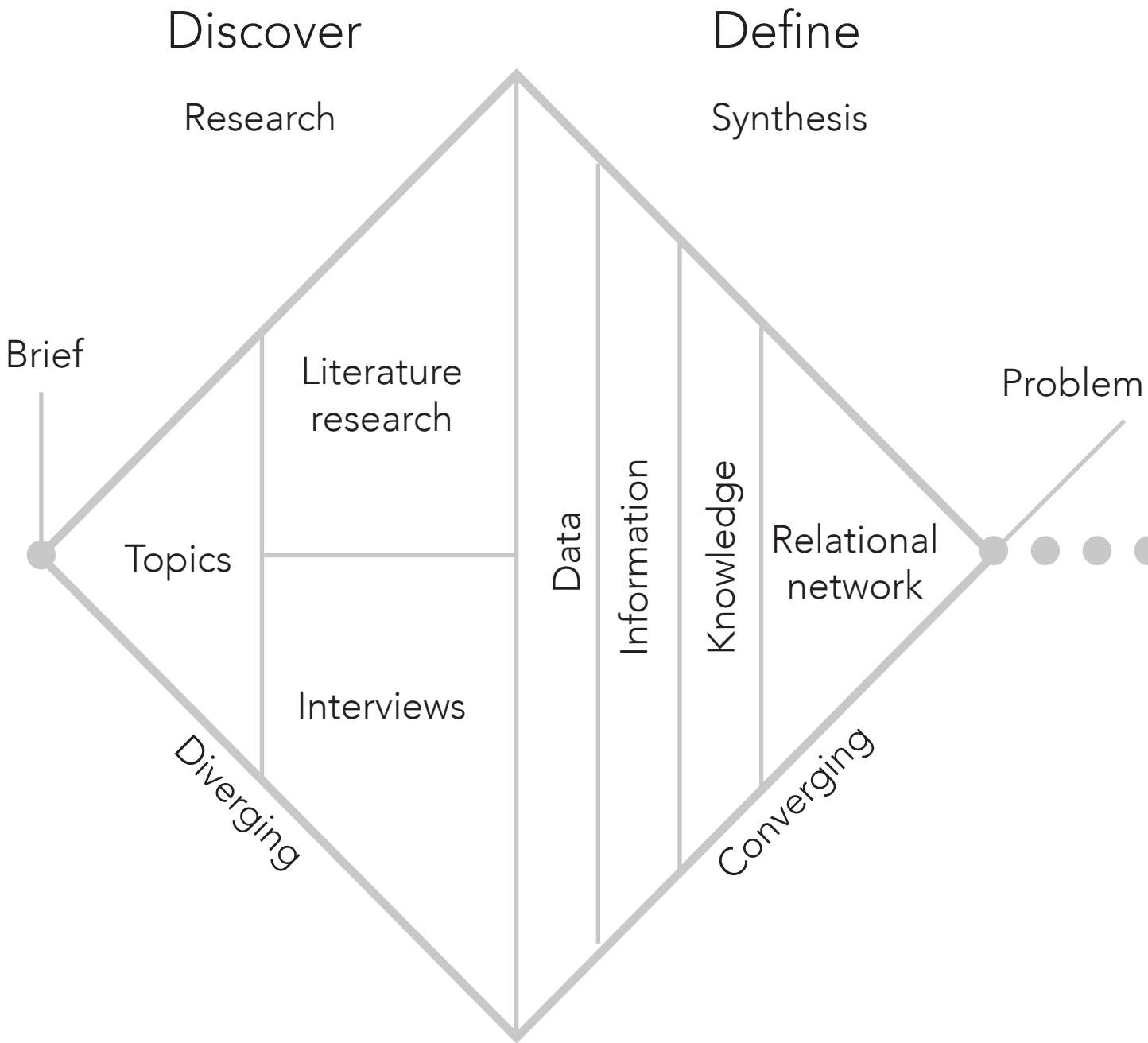
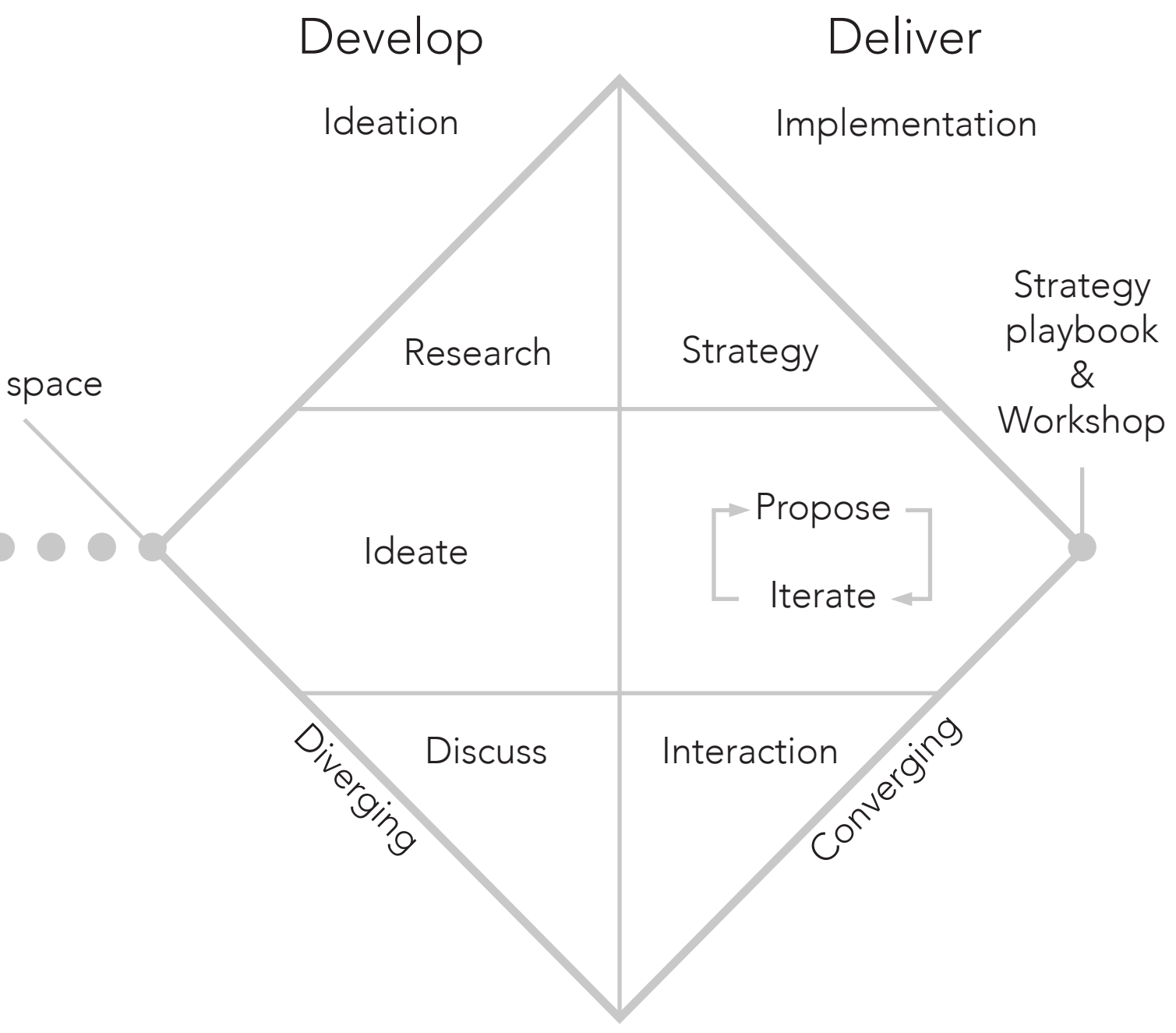


Figure 2: The Double Diamond method



2



# Discover

In this chapter the insights of the literature review will be described. The relationships between these insights will be outlined. Describing the methods applied to create the interviews and tools while relating to the sources and insights used.

## 2.1 Literature review

To start the qualitative research process a basis of understanding is necessary to compose the semi-structured interview guides. Therefore, an initial literature review is conducted on topics deemed relevant to the context Unplugged finds itself in. These topics are Service Design, leadership and agency-client relationships.

### 2.1.1 Service Design

The Service Design literature is researched for insights as that is the service that Unplugged offers to its clients. Herein the focus lays on what it offers, premises & beliefs and how it is undergone.

What Service Design attempts to offer is greater efficiency, profits and ease of customer use (McDermott, 2007). Leading to the question of how the process needs to be undergone to achieve those factors. It is stated that the process is best performed in collaboration between the service provider and service designer (Gloppen, 2012). This correlates with the literature on Service-Dominant logic where axiom 2 states "Value is co-created by multiple actors, always including the beneficiary" (Vargo & Lusch, 2016). The beneficiary of projects that Unplugged performs being the clients that hire them. Further, axiom 4 also states "Value is always uniquely and phenomenologically determined by the beneficiary" (Vargo & Lusch, 2016) meaning that the sole determiner of the value that Unplugged offers is their client. Solidifying the importance of building knowledge-based client relationships.

Thereby, one of the beliefs of Design Thinking, which is the process that Unplugged applies, is for creatives to have the skills to teach others and shape their own environment (Plattner et al., 2012). If the clients are not being taught through close collaboration, then they lack the experience to assess the agencies service quality (Diaz-Mendez & Saren, 2019). Furthermore, Brown (2009) states that Design Thinking is an approach to creative problem solving based on a human-centered design processes, which places the importance of having a positive impact on the stakeholders involved on top. The skills necessary to perform such a process are collective visioning, stakeholder empowerment and wise partnering (Plattner et al., 2012). The aspects of character which are stated to set Service Designers apart are their holistic approach, being empathic with all stakeholders, co-creating with all stakeholders and solving strategic & systemic problems (Fayard et al., 2017). Which is an optimal skill and character set to build relationships with clients.

This corroborates the need for a collaborative approach, where all stakeholders are taken into account to resolve issues on a strategic level. The latter being of importance as "The attitude towards the value of design change as the businesses climb the 'learning ladder' and reach a strategic level of design leadership" (Borja de Mozota, 2006). The change in perception or attitude towards design value being crucial because, as stated earlier, the service provider or client of the agency is the sole determiner of value (Vargo & Lusch, 2016).

In conclusion this means that Service Design offers greater efficiency, profits and customer satisfaction. The design process requiring empathy, close collaboration, teaching and the application of a holistic approach to problem solving of the

creative performing it. The interviews will be setup to assess the application of these requirements and the effects of Service Design at Unplugged.

## 2.1.2 Leadership

The literature on design leadership is important in the context of Unplugged as they are a creative agency that lead by design to define a vision and turn it into reality for their clients.

This is expressed in Turner's definition that 'design leadership is about helping organizations to envision the future and to ensure design is used to turn those visions into reality' (2002). Topalian (1990, 2002) adds that design leadership is one of the most powerful means of generating new ideas. Besides the generation of new ideas, Kotter (1996) states that leadership defines a vision for the future, aligns people with that vision and inspires them to make it happen, which is exactly what Unplugged is trying to achieve through their work. Therefore, how successful they are in doing so will be uncovered through the interviews.

Furthermore, design is active at three levels within an organization, namely; (3) strategic, (2) tactical and (1) operational (Best, 2006). This respectively correlates with the paper by Price et al. (2019) on Advancing industry through Design where three layers of 'things to be designed' are determined. These are (3) systems and organizations, (2) services, processes and interactions and (1) integrated products. These three are categorized into impact levels and listed below in figure 3 from most to least impact:

Impact levels	Design management	Advancing industry through design
Organizational transformation	Strategic	Systems & organizations
Organizational process	Tactical	Services, processes and interactions
Organizational service	Operational	Integrated products

Figure 3: Typology of Design impact

To have any type of impact, a creative agency needs to persuade the client of all the benefits, and how they largely outweigh the costs, to implement the proposition. This is where the skills of a creative leader come into play. These consist of relationship management, business analysis and negotiation, motivation & persuasion (Perks et al., 2005). Further, creative leaders are to set goals as to positively influence motivation, regularly refer back to core values and must find a balance in autonomy and structure (Stoll & Temperley, 2009). The latter directly relating to one of the main issues Unplugged is currently experiencing because of the controlling attitude of certain clients. The client typology shown in figure 4 explains the underlying reason for this client behavior.

Most successful leaders are found to be integrative thinkers according to Martin (2007), meaning 'they can hold in their heads two opposing ideas at once and then come up with a new idea that contains elements of each but is superior to both'. This

being necessary in Unplugged's situation as to find the optimal solution for the end user and the client. There are several requirements for strategic project leadership among which the following are important to the context in which Unplugged functions (Shenhar, 2015):

- Define the project's vision
- Define the project organization and processes, and build a plan for project execution and monitoring
- Conduct strategic project reviews, in which the needs, the strategy and the expectations are reexamined, in addition to reviewing execution status and progress
- Expect change; be ready to revise plans as the project moves forward
- Define a strategic charter for the project; obtain top management support upfront and throughout
- Define why, (for) what, and how the project will go
- Set the expectations in advance, including the business results; define multiple success dimensions for different stakeholders
- Create an on-going learning organization within the project

Besides implementing those principles, leaders need to be perceived as trustworthy and honest by behaving in accordance with principles that are acceptable to the trustor (Mayer et al., 1995). Therefore, it is essential that the intentions of all parties are clearly laid out beforehand. Thereby, transformational leadership which enables organizational transformations, the highest level of design impact as shown in figure 3, has a corresponding behavior set (Pearce et al., 2003) that needs to be exercised:

- Providing a sense of vision
- Challenging the status quo
- Engaging in idealism
- Providing stimulation and inspiration

Taking this one step further, there are two behaviors to empowering leadership that are important for the context of design projects, namely engaging in participative goal setting and encouraging teamwork (Pearce et al., 2003). This relates back to the literature on Service Design where Service-Dominant logic outlined the participation of all stakeholders in the design process (Vargo & Lusch, 2016).

In conclusion this means that to impact clients at the highest level, the creative needs to be an integrative thinker, have the ability to envision the future, challenge and persuade the client and behave with integrity. These qualities will be tested in the interviews by comparing the designers' statements with those of the clients to see if there are any shortcomings.

### 2.1.3 Agency-client relationships

The relationship literature is analyzed to understand the main influencing factors in the agency-client relationship. The typologies of these relationships are also analyzed to identify key connections.

The literature on agency-client relationships states that the first and foremost influential factor of the relationship is its chemistry. This meaning the trust, respect, rapport and comfort between both parties personnel. This is followed by the client

companies internal structure and politics, how the agency and the client work together and finally the product of their collaboration (Fam & Waller, 2008). These factors representing focal points for relationship building and management.

Building the relationship by creating trust, for which the client must perceive the agency as having the right intent, them being competent, dependable, credible (by using proof) and likable (Thomas, 1996). Besides the importance of trust, perceived value has the largest effect on the clients loyalty to the agency (Levin et al., 2016). That builds on the axiom of Service-Dominant logic, in which was stated that value is uniquely determined by the beneficiary (client) (Vargo & Lusch, 2016). A factor that influences the successful completion of projects is the comprehensiveness of information (van de Sanden, 2011). This is highly important as clients of Unplugged could have little to no prior knowledge of design and its processes.

To manage the relationship, one of the client holding strategies is to reflect regularly (Doyle et al., 1980), which coincides with the principles from the leadership literature (Shenhar, 2015). Factors which usually lead to conflict or break the relationship between agency and client are unclear decision making structures, unclear operating procedures and ambiguity in client and agency roles (Keegan et al., 2017). Stating that clarity on roles and procedures is to be established before the commencement of a project for a better opportunity at a successful relationship. For an agency such as Unplugged to properly approach their client relations, it is important for them to know what type of client they have sitting across the table as that will inform them on how to work with the client.

Figure 4 shows four different types of clients based on their knowledge level and their collaborative attitude (Diaz-Mendez & Saren, 2019). Their knowledge axis refers to how well they understand the expertise of the agency and the collaborative attitude axis to their willingness to collaborate with the agency.

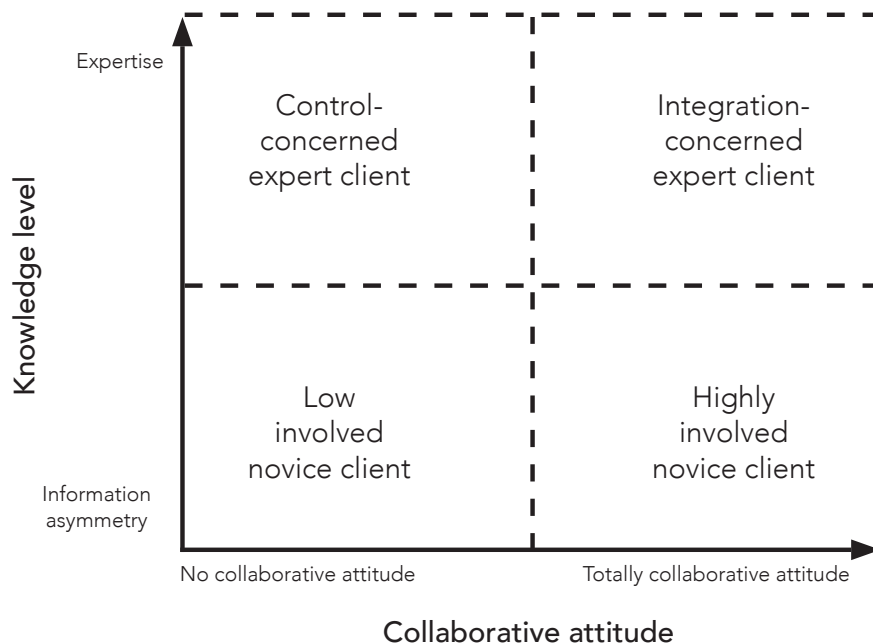


Figure 4: Classification of clients by knowledge level and collaborative attitude

The *novice clients*, if not taught, make counterproductive decisions and cannot assess the quality of the agencies work. Their ability to be taught depends on their collaborative attitude.

The *control-concerned expert clients* also have a negative impact on the relationship as they have a high degree of implicit expectations, are inflexible towards advice and blame failure on the agency. They control the process and see the agency as providing a routine service. This could not be farther from the truth when performing a design project and thus this makes collaboration and understanding difficult.

The *integration concerned expert clients* on the other hand are considered to be the ideal type of client. They see the agency as a partner, search for resource integration and base their assessment on joint work done.

Since these different types have such an impact on the relationship, it is important for an agency to understand and adapt to the related client needs for a successful outcome.

Besides the type of client there are two papers outlining different types of relationships. One that delineates three types of relationships between service designer and a client as can be seen in figure 5.




	Delivering	Partnering	Facilitating
			
	Designer    Client	Designer    Client	Designer    Client
Designers' role/ clients' role	Designers as experts in user-centred research and design / Clients as passive recipients of design insights	Designers as partners for collaborative user-centred design / Clients as participants in user-centred design practices	Designers as coaches to provide design knowledge and skills / Clients as user-centred design practitioners
Interaction of processes	Going independently	Mutually affecting	Merged into a single joint process
Core design practices	Developing detailed hand-over documentation	Organising collaborative workshops involving clients	Training clients and building their capabilities on the job
Designers' perspective	Highly user-centred	Mediating between users and clients	Highly staff-centred, not losing sight of users

Figure 5: The typology of designer–client relationships in Service Design

The relationships shown here are to a certain extent comparable to the type of client. When a client is controlling or hardly involved it becomes a delivering relationship, whereas the increase in collaboration creates bidirectional flow of information and knowledge. Depending on the purpose of the project, more precisely the level on which the work intends to make an impact, the type of relationship changes. The higher the level of impact, from organizational services to organizational transformation (figure 3), the more a partnering or facilitating relationship will be necessary. This is because transforming a company on a higher level calls for the company to be open to collaborate, learn and change. Figure 6 shows how the role, and thus the relationship, changes depending on the scope of the service. The project scope is similar to design on the organizational service level and the process scope is similar to working on the organizational process level (figure 7).

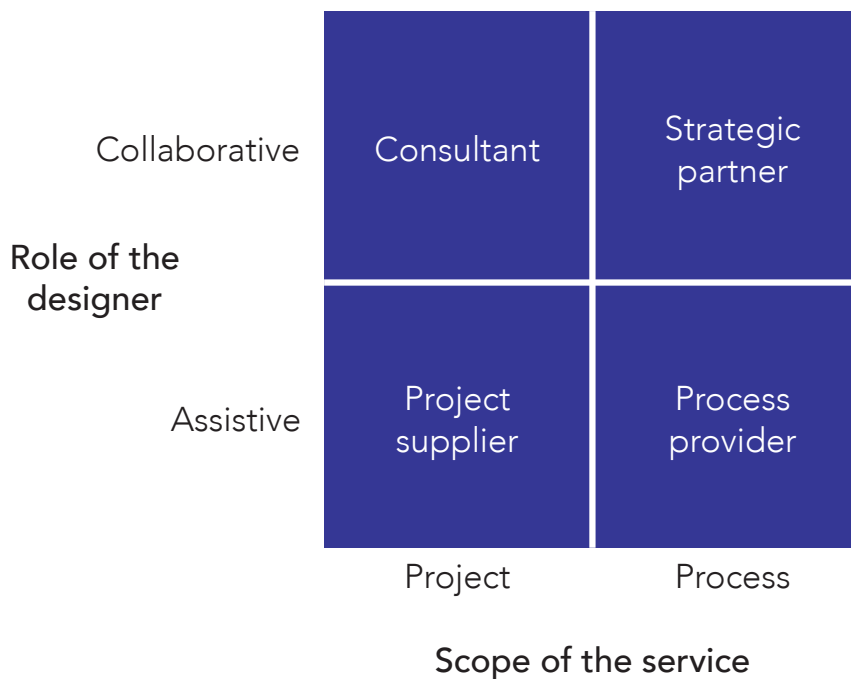


Figure 6: Four client relationship types

A project supplier or process provider relationship coincides with the previously mentioned delivering relationship. The consultant and strategic partner will need to have a partnering relationship to implement change. The strategic partner that manages to build a facilitating relationship will in effect be making an impact on the organizational transformation level or in other words redesigning the systems and organization. The relations can be seen in figure 7.

Impact levels	Scope	Role	Relationship
Organizational transformation	System	Strategic partner	Partnering/ facilitating
Organizational process	Process	Process provider/ strategic partner	Delivering/ partnering
Organizational service	Project	Project supplier/ consultant	Delivering/ partnering

Figure 7: Relations between impact, project scope, roles and relationships

In conclusion this means that the agency needs to understand the personal factors at play with the client as a person and internally at the company (structure, culture and politics). Besides that, the type of client and project need to be determined as to adapt to the necessities thereof. For the project to run smoothly the creatives need to be clear on roles, responsibilities and procedures from the start. During the project they need to be dependable so that the client can trust them. Keeping themselves on point by regularly reflecting on their work and behavior. These aspects show how besides the qualities and necessities of the creatives, a major influence on the successful growth of the relationship is based on mutual understanding. Therefore, the interviews will not only look at the creatives capabilities but also the perspective and mindset of the clients.

## 2.1.4 Conclusion

The literature review shows what the purpose and beliefs of Service Design are, as well as skills necessary and what to do for a successful project. For leadership, the behaviors and necessities for successful relations and project guidance are outlined. Finally, the most influential factors in agency-client relationships and the different types of relationships/clients are portrayed. This providing an adequate overview of relevant factors, to translate into questions for the explorative interviews to uncover the context and issues at Unplugged. The main insights are listed below:

- The work is best undergone in close collaboration
- The client is the sole determiner of value
- The client's attitude towards design value changes as they climb the learning ladder
- The creative must be empathic with all stakeholders
- The creative must be an integrative thinker
- The creative must apply a holistic approach
- Design has impact on a client at three levels: service, process and transformation
- The creative must envision, reflect, challenge and persuade
- Chemistry factors are the most influential on the relationship (trust)
- The creative must act in accordance with moral values acceptable to the client
- The most influential factors in an organization are culture and politics
- Perceived value of the work by the client has the largest influence on loyalty
- There are four types of clients: low involved novice client, control concerned expert client, highly involved novice client and integration concerned expert client
- There are three types of relationships with the client: delivering, partnering and facilitating



## 2.2 Interviews and tools

The insights gained allow for the creation of the semi-structured interview guides and timeline. To create these tools and ensure the quality and validity of the data guidelines described in the qualitative research literature are adhered to as is explained below.

To understand the context of Unplugged, the perspectives of all stakeholders are taken into account to ensure a certain validity. This through the gathering of information from each stakeholders perspective and having several people from each stakeholder group represent each perspective. Therefore, three semi-structured interview guides are drawn up to uncover the context factors at play, the perception and knowledge of the client and the experienced relationship with the client. The semi-structured interview format allows for the gathering of qualitative data or deeper insights by being able to go in on what the interviewee is saying when deemed necessary. At the same time it maintains a certain structure necessary for comparison of the data between interviews (McIntosh & Morse, 2015). The three stakeholders included in the research are the two heads of Unplugged, seven Unplugged designers and three clients which they have completed projects for.

The interview guides with the heads (appendix a) consist of three main themes; Unplugged, personal and client relationship. The first focusses on their vision and intended changes for the company, and the values and approach of the company. The second looks at what role they play, what procedures they use and why. The third consists of their take on what types of clients they work with and what types of relationships they have with their clients, respectively using figure 3 and 4 as a frame of reference.

The interview guides with three of Unplugged's clients (appendix b) are divided over the themes client, Unplugged and relationship. The first, to better understand who the client is as a company (goals, values, knowledge). The second, to uncover their expectations of Unplugged, to what extent Unplugged fulfilled those and what the agencies largest added value was. The third dives into the chemistry of the relationships as outlined in the literature, such as trust and respect as well as information on the roles, interactions and communication during the project(s) with Unplugged.

The interview guides with seven of the Unplugged designers (appendix c) were also divided into three themes namely Unplugged, perception of client and relation with client. The first theme focusing on their goals, values and measures within Unplugged. The second looking into what they perceived to be the clients expectations and their fit with the client. The third aimed at the relationship chemistry and approach for projects.

To sensitize the interviewees and allow for information sharing that might not have been discussed during the interviews, a timeline was also introduced to the seven designers at Unplugged prior to the interview (appendix d). The timeline represented a project that would be discussed as an example in the interview. On the timeline, the designers would fill in detailed information about the project such as the tasks, feelings and reasoning. This follows the guidelines of the Convivial Toolbox: generative research for the front end of design by Sanders & Stappers (2018, p.54) where is stated that the timeline exercise allows people to describe their needs and

values through the layered approach. Besides that, it was used to gather information on whether reflections are conducted during projects as that is outlined as a necessity for project leadership in the literature. Finally, they were asked to respond to questions about the type of clients they work with and the type of relationship they have with these clients based on figures 4 and 5. Adding to this their explanation of what they would deem as ideal to better understand their perspective.

## 2.3 Conclusion

The discover phase has allowed to determine aspects relevant to the scope of this project. To that extent, the interview guides and a sensitizing timeline were created. All the data that will be gathered is synthesized and compared in the define phase to ensure its validity through triangulation (Mishra & Rasundram, 2017). This entails the collection of data in several different forms for comparison, to diminish the possibility of false data.

3

# Define

In this chapter, the process of analysis and synthesis will be described. The data collected is synthesized into knowledge through comparative analysis, and the resulting clusters are explained to create an understanding of the issues and their relationship to each other. In order to substantiate these insights, they are cross-referenced with the insights from the literature review.

## 3.1 Synthesis

The synthesis process is conducted in conformity with the guidelines described in the Convivial Toolbox (Sanders & Stappers, 2018). Hereby, the synthesis will be framed into five stages, and the entire process is conducted in Miro to reenact an Analysis on the wall. This method allows for the generation of new knowledge and can be performed by one designer. Most importantly, the richness of the data is relatively high when compared to a more thorough analysis using a database. The result of this phase will both inform the development of the strategy playbook and workshop in the next phases and generate new theory on designer-client relationships. The latter will be grounded in the literature to ensure validity. To place this process in context it will be explained through use of the DIKW model.

The hierarchy of the analysis will thus be framed in the Convivial Toolbox variation of the DIKW model by Ackoff. This model can be seen in figure 8 and shows how the data is first collected from phenomena and then information is generated as the researcher interprets the data. By looking for relationships in the information, theories are generated which constitute knowledge. Finally, when decisions are made on what to do with the knowledge generated it becomes wisdom. Relating this to the stages outlined below; in stage 1 data is generated, in stages 2 and 3 information is created and in stage 4 knowledge is produced. The knowledge consists of theories which in stage 5 are supported by evidence from the literature review. The wisdom layer will only be achieved in the next phase when these theories, in combination with new knowledge, are translated into advice in the strategy playbook.

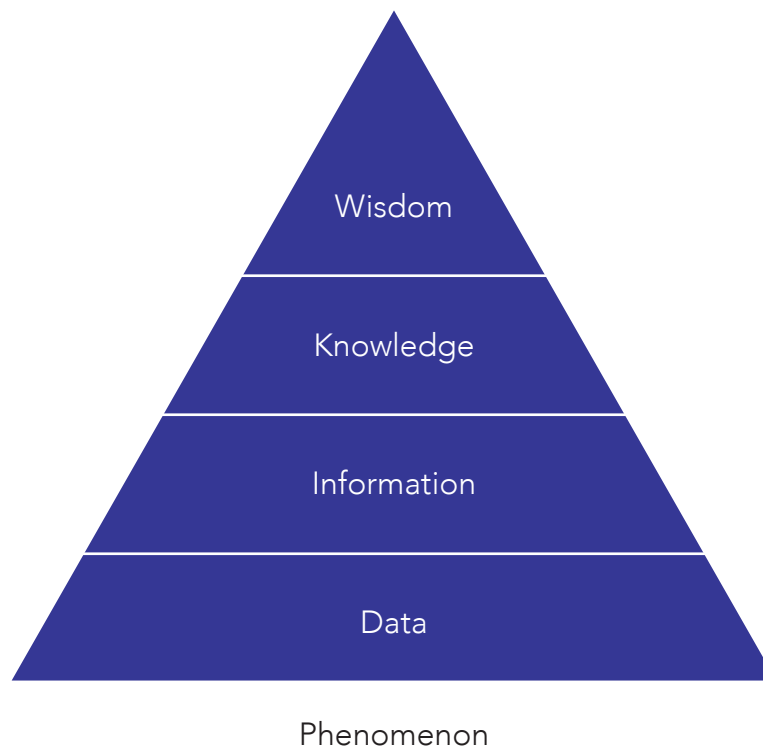


Figure 8: DIKW model

### 3.1.1 Stage 1

All the interviews were conducted via Zoom due to the current Covid-19 restrictions. These were recorded with the consent of each interviewee and all data used in the analysis was anonymized. The first stage of the synthesis process is the transcription of the interviews. The data is written down onto post-its per question asked as can be seen in appendix . These questions follow the categorization into the themes that were created for the interview guides. Specifically, two types of data were created. For the most part summaries of the answers given by the interviewee but also direct quotes from the interviewee. During this process the data was translated from dutch, the language in which the interviews were performed, to english. The interviews were performed in dutch as that was the most comfortable language for all interviewees. The data was translated in the first stage to allow for communication with the supervisory team and a flow of thought throughout the synthesis stages without the need for constant translation when looking back at data from an earlier stage.

### 3.1.2 Stage 2

The main focus during this stage was threefold. First, to find links in the post-its of what happened with the opinions and causal relations. Second, to categorize for later comparison as previously stated. Third, to diminish the amount of data without influencing its quality, to make it manageable for comparison. The overview of the independent analyses can be seen in appendix e. The categories would determine what the post-it was about. For example, post-its about agency character would be placed together, compared and initial relations drawn up. Same goes for many other categories deemed relevant based on the literature review such as personal values, client expectations, relationship approach, representations of leadership, etc. These categories were created for the interviews with the designers. However for the data from the interviews with the heads, categories such as problems, roles, values and goals were created. The categories for the client interview data was similar to that of the designer interviews on aspects such as personal values and differed on aspects such as positive comments of Unplugged, negative comments of Unplugged and feelings about working together.

### 3.1.3 Stage 3

This stage entails the beginning of the comparative analysis. Here the goal was to define the clusters or information related to each other within each type of interview. Therefore, this comparative analysis was conducted on the interviews within each group (heads, designers and clients) exclusively. Besides looking at the information from the interviews, the data from the timeline was analyzed and synthesized to compare with the information from the interviews with the designers. The names of the clusters are the same from different interview types when they have the same meaning.

#### Heads

The interviews with the heads were synthesized into seven clusters. These clusters can be seen in figure 9. Some of these clusters only contain one information post-it, this is because the cluster coincides with those from the other interview types. Therefore, it is necessary to take these into consideration as that brings all perspectives together in the next stage of analysis.

understanding of value	clarity	professionalism	longer projects	include in proposition	less advising more leading	autonomy
sell process, while client wants deliverables	shouldn't assume that clients will come along in the process	standardize process to ensure quality	currently loss of projects after research	team is included (placed on project) too late	need to push back more to innovate	have our own accounts
when client understands value of work	client not always conscious of necessary extra budget and/or resources to implement or continue	best apply the power of individuals at unplugged				
focus shifts away from deliverables	clients often want to maintain control	time and availability often dictate who works on project				

Figure 9: Clusters from interviews with heads

The first cluster 'understanding of value' speaks to the lack of understanding from the client. This manifests itself by them wanting clear deliverables, however when they start to understand the value of the work their focus shifts towards collaboration. The heads see this transition when they can start billing on time and material instead of a fixed scope (fixed set of hours and deliverables).

The 'clarity' cluster outlines a lack of clarity. This built on the lack of understanding from the client and assumptions on understanding by Unplugged designers. A consequence hereof being the controlling attitude of the clients as perceived by the heads. Thereby, this attitude is caused by a lack of clarity and understanding on both sides during projects.

The 'professionalism' cluster delineates a need or want for more professionalism. The process is currently not standardized which makes it more difficult for Unplugged to ensure quality. They wish to have the ability to place the people best suited for certain projects on those projects. However, this is currently often dictated by the availability of the person.

The 'longer projects' cluster represents the interest from the heads to have more long term projects. Here we see that the projects are often rounded up after the research phase while Unplugged has several other value propositions that only come into play at later stages.

The 'include in proposition' cluster is about including the team that will be working on the project in the proposition phase. This is the phase prior to the start of the project where the time, deliverables, price and other factors are agreed upon. The heads find it important to include the team as the scope of the project is also determined in this phase and that is what the team will be working on.

The 'less advising more leading' cluster focuses on the desire from the heads for Unplugged to take a stronger stance. The head would like them to make more of a push for clients to innovate than conceding with the client's risk averse attitude. Doing this from a place of expertise and understanding, based on their behavioral research, for a greater impact.

Finally, the 'autonomy' cluster speaks to their independence from Makerstreet. They want to start bringing in their own clients and building relationships with them. The client would then not see their relationship as being with Makerstreet, but rather with Unplugged.



## Clients

The information from the interviews with the clients was synthesized into four clusters. These clusters and their content are shown in figure 10 below.

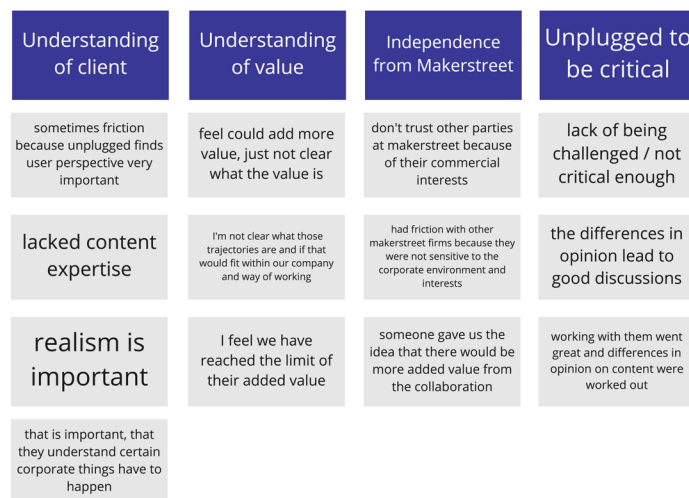


Figure 10: Clusters from interviews with clients

The 'understanding of client' cluster contains expressions from the clients about how Unplugged lacked empathy for the situation of the client. Either they would push too much for the users needs uncovered in the research or show a lack of realism when it comes to understanding the client's needs. For example, specific requirements of the client and the need for revenue generation from new propositions in the short and long run. The client also mentioned that sometimes the agency team lacked knowledge on the clients expertise which they should have had in-house.

"Some people at Unplugged find the client perspective very important... I know someone found it very annoying to do it in that way, that they actually didn't want to do it... they gave their opinion; we would really advise you to do it like this, and we said; well that is not possible because we really have to do it like this, otherwise we will have legal issues later on... but at a certain point they adapted it to how we wanted." - client

"Sometimes, because I'm rather content driven, I was concerned about if they could sufficiently empathize with what was, on a content level, important to us." - client

The 'understanding of value' cluster is built from client statements expressing their lack of insight in or understanding of the further added value that Unplugged has to offer. This was expressed in different ways. One client said, "I see they have further value however I do not know what that is and how that would work for my company" while another client stated to not see any further value in working with Unplugged, and compared the work done with them to cooking: "they give us tools and methods to make a delicious meal together and now we want to try and cook our own meal".

The 'independence from Makerstreet' cluster corroborates the need for Unplugged's independence as the clients had negative experiences with Makerstreet. The umbrella company was experienced as trying to upsell where it wasn't necessary, which lead to some distrust by the client. Here again a lack of understanding for the client's situation from Makerstreet parties was expressed. Also, projects were sold

with a promise of great value which the client felt in the end wasn't fully delivered.

“In the past I have experienced that they (Makerstreet) quite easily took advantage of the lack of knowledge about innovation in our department. So that they try to make an upsell that might not have been necessary or could have been done for half of the time or half of the money.” - client

The 'Unplugged to be critical' cluster consists of one statement about how a lack of criticality from the agencies designers was experienced. This being stated as the cause for seeing little value in continuing the collaboration. To corroborate there are two statements on how much value Unplugged's critical opinion added to the project. Thereby, the client deems a critical view on the work as extremely important for the quality of the project.

### Designers

The information from the designer interviews was synthesized into nine clusters. These nine clusters contain information from all the interviews and in some cases show connections to each other. The clusters and their interconnections to each other can be seen in figure 11. The seconded clusters are corroborated by the information synthesized from the timelines that the designers filled in. This synthesis can be found in appendix f.

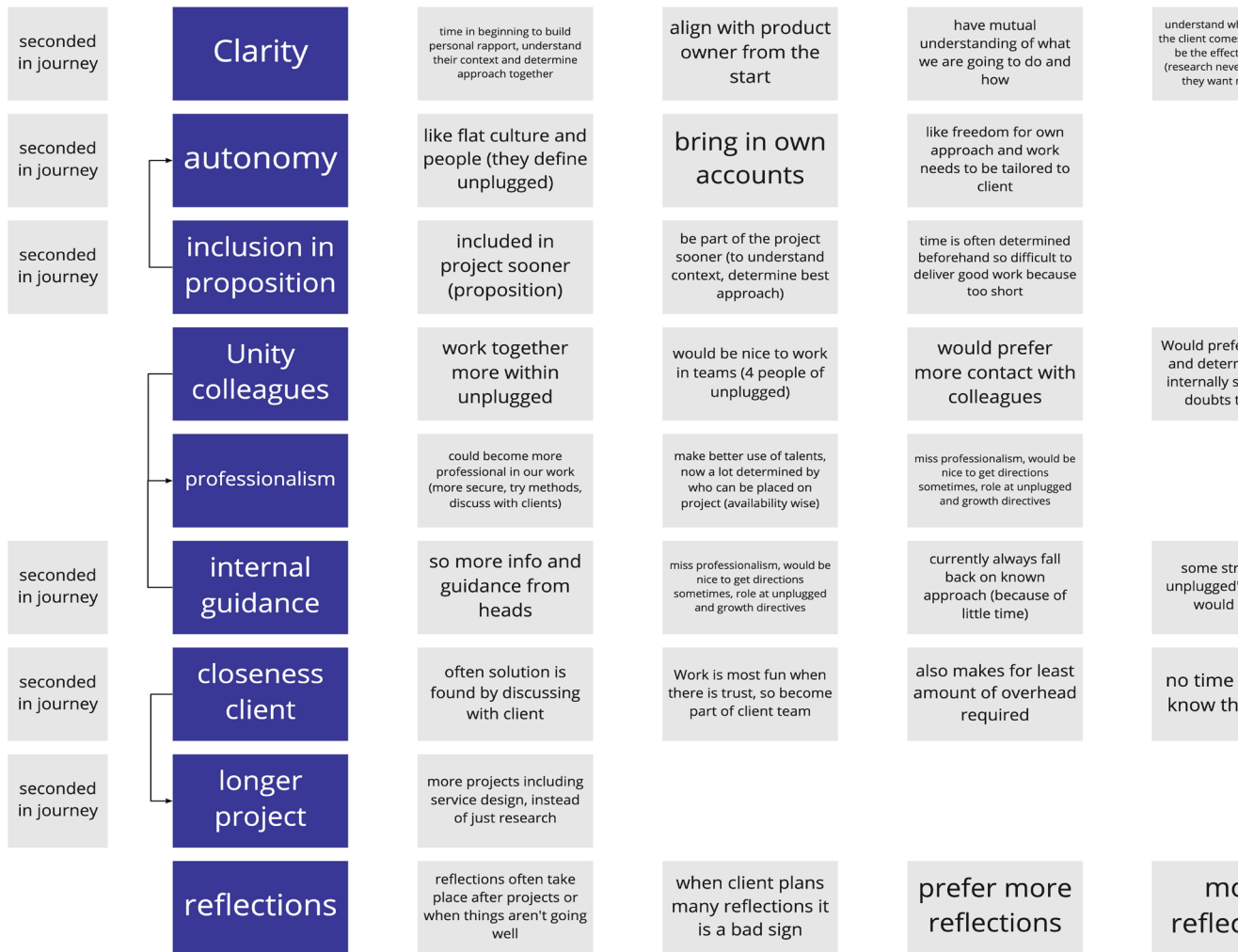


Figure 11: Clusters from interviews with designers

The 'clarity' cluster contains statements from the designers about the lack of clarity or need for more clarity. Several topics are touched upon in relation to this cluster. First, the need for time to get to know the client on a personal level at the beginning of projects as currently the designers start working on the project straight away. Second, the need for alignment with the client on what is going to be done and how. This includes clarity on roles, communication and responsibilities. Third, to better understand the client context and what they expect for the project. Finally, to ensure that the client understands the projected outcome of the project and what will be required of them to achieve this.

“What I miss is a sprint 0...a sprint 0 is the first sprint in which you don't deliver anything just purely two weeks in which you present yourself to the client and don't go into depth, just get to know each other and get a feeling for their context.” - designer

“What I think would be good is if we learn to, from the start, understand where a research request comes from, what it does within the whole of what is happening at a client... understand what the final goal is.” - designer

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so more clarified  
beforehand so you know  
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together

client clarity prior  
to touchpoints

good to determine before  
project: client expectations,  
roles, time they want to spend,  
goals (when proposal meant to  
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and determine things  
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undervalued, make it  
more humane, get to  
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ore  
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would be good to have  
reflection moments also  
when things go well

more  
reflections

The 'autonomy' cluster represents the expressions of how much autonomy is appreciated by the designers. The flat hierarchy at Unplugged and freedom they have to apply their own approach for projects is highly valued. Stating that autonomy is important, as the work needs to be tailored to the client and only the designer working closely together with the client can fulfill that need. Finally, there is also a desire to start bringing in their own accounts to become more autonomous in relation to Makerstreet.

"I really like that everyone does what they are good at or gets enough space to do what they are good at or approach it in his or her way, because the client requests are so different or the context is so different that in the end it is often tailored to the client." - designer

The 'inclusion in proposition' cluster shows the designers' wants for more input and involvement before the start of the project, to enable them to work closely with the client and agree on what is required to deliver the best quality of work. The engagement of the designers early on in the project also allows for a better understanding of the client and the client context, prior to the start of the project. This also enables the designers to positively influence the approach for any given project.

"Ideally I would like to be included earlier in the sale of a project so that you see from the beginning what is going on at the client company." - designer

The 'unity colleagues' cluster shows how Unplugged designers would like to work together more. This was expressed by wanting to work in larger teams as they usually only work in teams of two. The preference for working together comes from the designers desire to be more confident with the client, and their preference for working with others. This is, perhaps, a reflection of the designers' desire to work more as a team, and to get to know each other better within this young agency.

"I would like to work together more internally, I've worked on a project alone or with one other person, but I think that in innovation it could be very strong to work with three or four people as Unplugged team...you can stand strong together and learn from each other." - designer

The 'professionalism' cluster to a certain extent coincides with the 'internal guidance' cluster in that it expresses a need for a more secure approach to projects within a structure that enables experimenting with new methods with limited risk. The designers would also like the placement on projects to be based on experience and preference rather than availability. From an internal perspective, having clear roles & responsibilities for the designers, would be appreciated. Effectively, a more structured approach in which the designers can innovate and evaluate new ways of working in a secure environment is desired.

"The culture is very nice and flat and all that, but sometimes we miss a certain amount of professionalism i think...you are working on projects and what is then your role or where are you growing towards, I miss those measures of professionalism." - designer

The 'internal guidance' cluster shows the need for guidance on internal aspects and the approach to projects. Some designers keep falling back on what they learnt during their education as they have not been taught new approaches since and

do not have the time to try out new approaches during projects. Designers would appreciate having more structure in Unplugged's approach. This combined with more internal communication to ensure clarity of purpose would improve work on client projects. More frequent communication with the heads would also, in some cases, be appreciated for a stronger support structure for client work.

“We easily fall back on what we have done previously (approach), which is logical as you know how that works and how much time it will cost, but I think we might miss things that we don't do.” - designer

The 'closeness to client' cluster consists of statements about the need for a closer collaboration with the clients. On the one hand the interviews highlighted that 'smalltalk' is undervalued, and that getting to know the client better should be and integrated part of the approach. A close working relationship with the client is key to client understanding and 'buy-in'. When work is done by the designers and then proposed to the client it is met with more resistance. A closer relationship is seen by the designers as more fun and when trust comes into the equation is also much more efficient and effective. Finally, as most of the solutions come about during discussions with clients, the designers would like to work more closely with all clients, to optimize the chances of the outcomes of the work meeting the clients' expectations and needs.

“Work is most fun when it is really based on trust and you therefore don't have the feeling that you are a paid by the hour, happy go lucky consultant, but become part of the team.” - designer

“A project feels more like a success when I have the idea that I was able to bring the client along in the process...if they in one way or another show interest in what you are doing...if they also feel like the owner of the result.” - designer

The 'longer project' cluster highlights the designers interest in having more Service Design work. The designers find that the behavioral research phase is necessary but want it to continue on to Service Design, as this is an area of specialization for most of them. For some of them, this is also where their true passion lies.

“If a client says okay this is the first part, now we also want the second...when you have made a journey for example and the client says great these are the opportunity areas, what do we do with these now, can you help us with that.” - designer

The 'reflections' cluster shows how the designers think there is a need for more reflecting. This because when the client has to organize reflection sessions it is often a bad sign, as it indicates that they want to improve or change things because they are not going as planned. Therefore, the designers would like to plan adequate time for reflection as part of the process, rather than wait until something has gone wrong to do this, as is currently the case.

“I really like to reflect and at Unplugged it is often overlooked...at Unplugged we do a retrospective after a project but then you can't do anything for the client anymore so would be nice to reflect more often and during projects with clients.” - designer

## Relations

The relationships present between the clusters take several forms. The 'inclusion in proposition' cluster is part of the 'autonomy' cluster in that it is a form of autonomy. Giving the designers more of a say earlier on in the process gives them the ability to determine aspects of the project which they would otherwise not have a say in.

The 'internal guidance' cluster is one of the aspects that could help improve 'professionalism'. As the designers speak of more communication with the heads and more structure to improve 'professionalism'. The 'unity colleagues' cluster also increases 'professionalism' as it is stated that through internal communication and collaboration the designers could build greater confidence when approaching clients. The 'closeness to client' cluster is possibly one of the contributing factors to 'longer projects', as close collaboration between the designer and client is expressed as a better understanding of the client, which generally leads to clients extending projects. These relationships will be brought into perspective in stage 4 where the relationships between clusters are identified and in stage 5 these will be corroborated against the literature.

### 3.1.4 Stage 4

The comparative analysis between groups showed a connection that has a fundamental influence on the relationship between the agency and the client. It was found that the client's level of knowledge in regard to design (process, value, effect) prior to a project affects how best to approach the project and the relationship with the client. These effects are shown in figure 12. The more a client has experience with design the more understanding and trusting they are of the agency. At the same time they better understand the difficulty of implementing change and express a less controlling attitude over the agency. When the client has less experience with, or knowledge of design, the monetary aspect of the project takes on much greater importance. In this case, the focus of any given project for that client is mainly to increase revenue, making it harder for Unplugged to work with them. As was stated by an Unplugged designer: "revenue is a truth I need to come to terms with; the world improver inside of me". Finally, the clients' expectations of how they will go about the project change based on their experience with design. When they know nothing about it, they tend to expect a delivering relationship and see the agency as delivering a routine service. With greater experience with design the client's attitude is more collaborative, the agency is seen as more of a partner, and the value of the work is more clearly perceived.

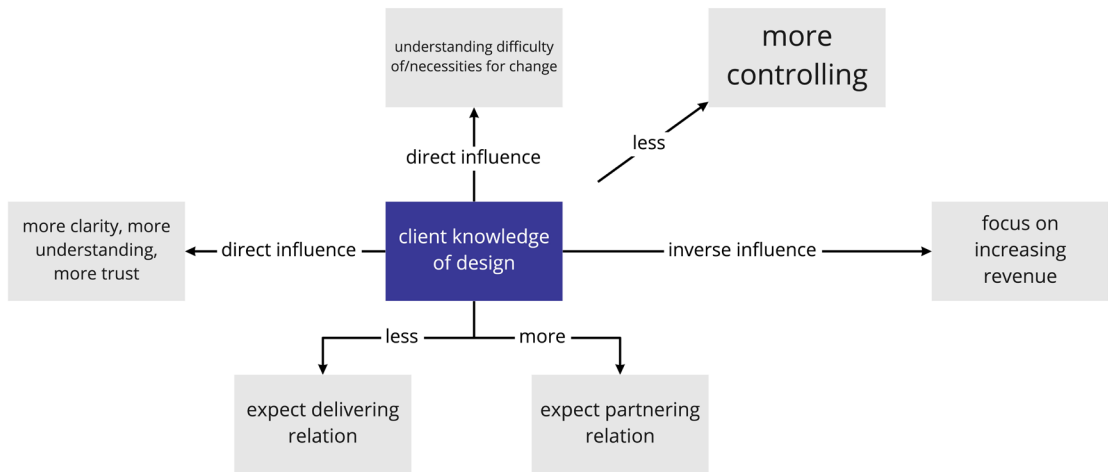


Figure 12: Lack of client design knowledge causal network

This issue is however only one of the moving parts when it comes to the context in which Unplugged finds itself. The issue and its solution are found within the greater relational network shaped by all clusters from the synthesis. This relational network can be seen in figure 13. The clusters are divided into three categories by placement. On the left the clusters which represent client choices, understanding, knowledge and perception are placed under external factors. This because the client is an external party to Unplugged. On the right the internal factors are shown, as they relate to Unplugged and the issues they face. Finally, in the middle are the clusters which take place during the relationship of the agency and the client. Note that coinciding clusters from different interview types are merged.

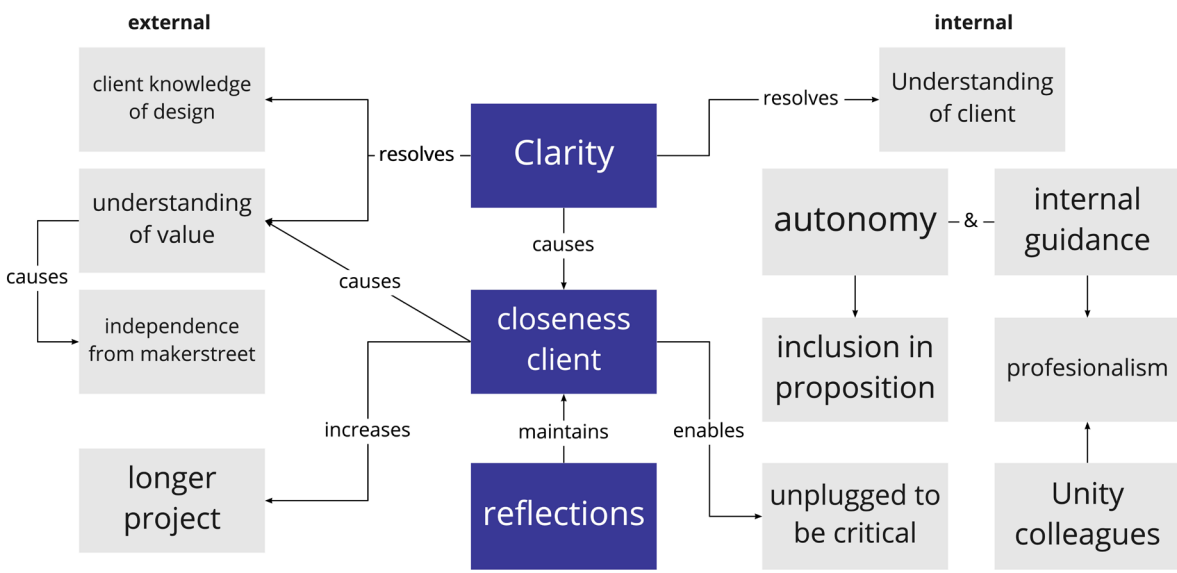


Figure 13: Problem space causal network

The 'clarity' cluster is the most influential one, having a direct effect on the previously determined main issue around 'client knowledge of design' and consisting of the largest amount of information from the data. When clarity is achieved with respect to the vision, approach and resources for the project, together with a sufficient level of knowledge about design for close collaboration, the issues can be resolved. At the same time, the agency designers need to be empathic with the client and focus not only on the project content but also the client relationship. This could resolve

the lack of 'understanding of the client' on the part of the designers. In this way, both parties would understand all aspects relevant to the project (vision, approach and resources/ responsibilities) and of each other (internal politics/culture of client and design culture of agency). By establishing this 'clarity' and therefore a 'closeness to the client' (agree on close collaboration beforehand), the value of design can truly be experienced by the client, thus resolving the 'understanding of value' cluster and, through the close relationship with the designers at Unplugged and an understanding of the value they deliver, create the necessary 'independence from Makerstreet'. This approach could also lead to the prolongation of projects by the client, based on a clearer understanding of the benefit for them and their company. Unplugged designers could even be more constructively critical; all this possible if designers could build their relationships and projects through the 'inclusion in proposition' and the 'autonomy' to bring in their own clients, confidently with the 'professionalism', 'internal guidance' and 'unity colleagues' (open collaboration between colleagues) at Unplugged. In conclusion, the key is to maintain a healthy relationship with the client, through regular reflection and mutual checkpoints throughout the project.

### 3.1.5 Stage 5

Due to the qualitative nature of the data, the conclusions need to be grounded in evidence based on findings from the literature review. Therefore, if proven to coincide with the literature the conclusion, consisting of the relational network as seen in figure 13, will be treated as theory.

The implied solution cluster 'clarity' is substantiated by the need to avoid ambiguity as that is a source of conflict (Keegan et al., 2017) and the need to create a vision together with the client (Kurucz et al., 2017). This would then resolve the main issue of lacking 'client knowledge of design' as Unplugged would educate clients in the basic elements of design, which is necessary as Service-Dominant Logic states: value is co-created by multiple actors, always including the beneficiary (Vargo & Lusch, 2016). Furthermore, the client type literature states that an optimal client understands the process and can thereby seek a partnering relation to assess the final service on joint work done (Diaz-Mendez & Saren, 2019). This understanding by the client only being possible if Unplugged first teaches the client the basics of design as applied by them (clarity).

Then there is the need for 'understanding of value' as Service-Dominant Logic states: value is always uniquely and phenomenologically determined by the beneficiary (Vargo & Lusch, 2016). In addition to this, value has been determined to have the largest effect on loyalty, which results in longer-term projects and clients loyalty (Levin et al., 2016). This loyalty is also a result of trust, that comes from the closeness of the relationship (also necessary for leadership, criticality, radical creativity and understanding). The trust, honesty and integrity of Unplugged designers is apparent in interviews with clients. Beyond these basic, but critical elements of a client-agency relationship, 'understanding of client' is the first of five trust builders, described as 'client-orientation' (Thomas, 1996); the designer's capability to understand the clients needs and place them on par with their own, or that of the end users. The closeness of the relationship is also important when looking at different client types. The ideal clients are defined as the 'integration concerned clients'; who will work closely with the agency, and are considered 'ideal' for successful business (Diaz-Mendez & Saren, 2019).



Finally, we have the substantiation of the methods for sustaining the relationship and increasing clarity. For the former, the proposal of regular reflection sessions comes straight from the literature as a client holding strategy (Doyle et al., 1980). For the latter, the creative leadership literature states the need for a balance between internal guidance and autonomy (Mainemelis et al., 2015), where currently Unplugged is lacking in internal guidance. Adding to this is the lack of collaboration between designers which is a waste of an advantage as Service-Dominant Logic states: Skills and knowledge are the fundamental source of strategic benefit (Vargo & Lusch, 2016). This was seen within Unplugged as those with more experience and thus knowledge were also more autonomous than those who were less experienced.

## 3.2 Conclusion

The five stages of analysis have led to a relational network which represents a large part of the knowledge generated in this study. The effects of each cluster on one another, and the key role they play in achieving successful client relations are corroborated against the literature. Several relations do intrigue as they differ from the literature. The most influential being the impact of the clients knowledge of design on the relationship, manner of collaboration, roles, their attitude and their values. In the literature a change in attitude was only mentioned when the client learnt the value of design. Further, trust in Unplugged was expressed by all clients with one also stating to see no further value in the collaboration. This contradiction points towards the necessity to challenge the client while building trust as that increases the perceived value and thereby loyalty. Besides that, another client described the opposite, namely not applying Unplugged's full potential as they do see further value but don't understand how it would apply to their company. This insinuating a requirement to not only challenge the client but also teach them so they can understand and pursue further opportunities. Thereby, this represents the current issues and thus necessary changes for successful client relationships. In the development phase an exploration of the solution space will lead to the creation of a strategy playbook which outlines what and how to change in order to alleviate the established issues and build successful client relationships.



4

# Develop

The delineation of the problem space allows for exploration of the solution space in the define phase. The search is done for approaches, tactics and guidelines to best go about client relationships to uncover the optimal combination for the strategy to resolve all issues that have been brought to light. To further understand the optimal combination of approaches, tactics and guidelines to go about client relationships, this research has gone beyond the theoretical scope and has delved into the practical implications. This through in depth discussions with experts and practitioners to further understand what has worked in their experience in the practical world setting, instead of merely theory. Combining the gathered theoretical and practical knowledge to guide the ideation and develop the strategy playbook with two purposes. The first being the resolution of all issues defined in the previous phase, as these issues are most likely relevant for many creative agencies. The second being an actionable guide, composed in accordance to its own advice, for designers and creatives to increase their impact, build lasting relationships and grow.

## 4.1 Research on relations

The *Strategic Design* book by Calabretta, Gemser & Karpen (2018) outlines a need for the client to feel ownership over the project combined with a future orientation or shared vision. These two factors are placed on axes to represent four types of projects as can be seen in figure 14.

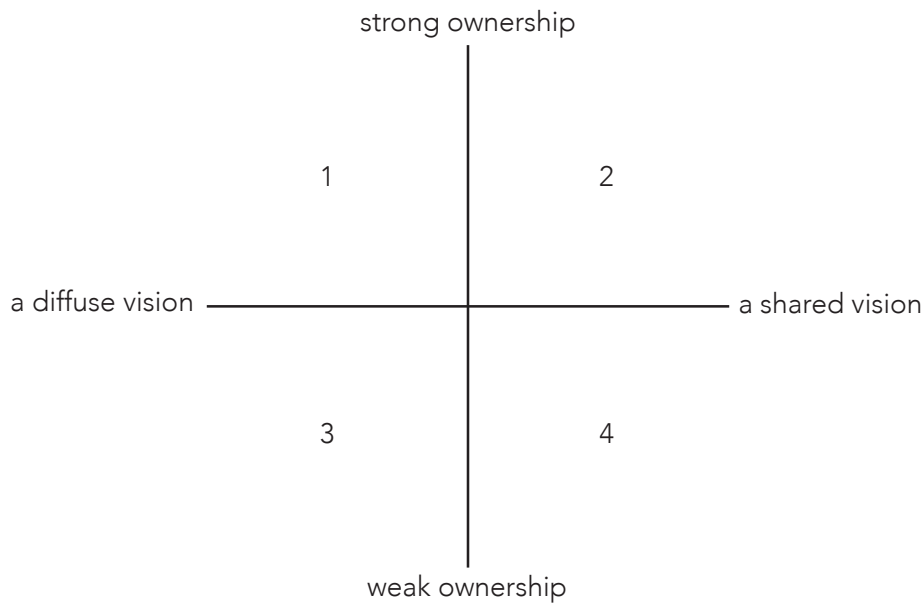


Figure 14: Four types of projects

The book states that the ideal situation is quadrant 2 where there is a shared future vision between agency and the client company while also having strong ownership within the client company. To identify these aspects several questions are setup to assess shared vision and strong ownership. When all of them can be answered positively then the project can be plotted in that second quadrant. These are:

### Shared vision

- Is there a project vision?
- Is the project vision a good fit with the wider goals of the organization?
- Is the vision shared across the company?

### Strong ownership

- Who is responsible for the innovation project, its implementation and future nurturance?
- Does the project owner hold the mandate to execute and complete the project?
- Does the project owner have a budget that matches the project's ambition and goals, and the implementation phase?

When either of these two sets of questions can't be answered positively then the designer respectively needs to either create a vision that inspires enthusiasm throughout the organization or create awareness for what is needed after the project is implemented. When relating this back to the work performed at Unplugged there

are different levels at which their type of design can have an impact. These being the levels established in the discover phase shown in figure 3, namely organizational service, organizational process and organizational transformation. Therefore, depending on the level of impact intended, a person higher up in the client organization is needed for ownership and vision of the project.

Since Unplugged, as most young agencies, cannot permit themselves to pick which clients they do or do not want to work with, it is essential they set themselves up for success with every type of client. This is achieved through a reflexive understanding of the dissimilarities in beliefs between their clients and them. Therefore, the Golden Circle as proposed by Simon Sinek (2010) delineates how to communicate to the outside world. As seen in figure 15, the concept is to begin with communicating the reason why the agency does what they do. Thereby, this entails their purpose, belief or vision which is the agency's reason for existence. In the analyzed situation of unplugged, this would be to make organizations more human-centered. After that, the agency is to communicate the how that shows evidence of working towards their vision and could for example be Design Thinking. Finally, they are to communicate what they do which could for example be conducting interviews and creating journey maps. In this way, the relationships with clients can begin from a place of shared vision and for a project get boiled down to a more specific purpose or goal. Since the starting point is then a shared vision for the organization there is grounds for continuation after any project on to another with the potential of increasing its impact level.

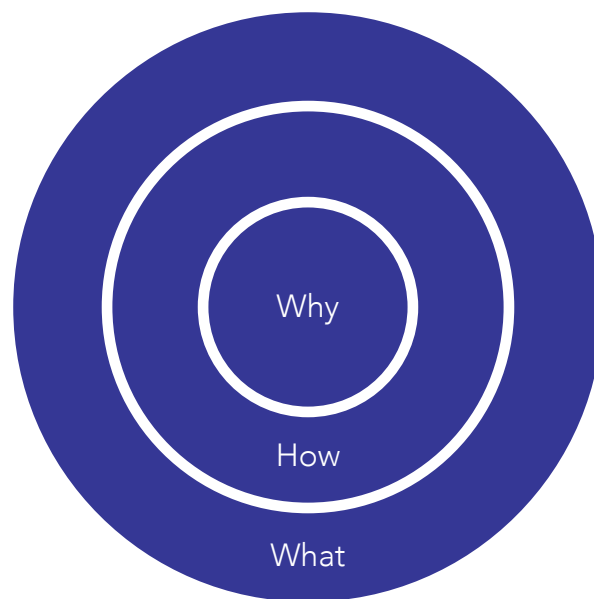


Figure 15: The Golden Circle

The models show how creatives must perform several activities to grow the relationship. To increase the level of impact the project owner will need to be higher up in the clients organization to positively answer the last two questions, thus identifying strong ownership (Calabretta et al., 2018). Not only the client will need to be higher up in the organization's hierarchy but also the relationship with the client will need to evolve. Thereby, as explained in the discover phase, for organizational process or transformation level change the designer must become a strategic partner with a partnering and/or facilitating role. To become a strategic partner, a trusting relationship needs to be built as explained in *The trusted advisor* book by Maister, Galford & Green (2012).

The book outlines several principles of relationship building. One of them is to go first and take personal risk. The reason being that one of the characteristics of trust is that it is intrinsically about perceived risk. Thereby, this vulnerability characterized by doing something for another without any guarantees has been identified as a birthplace of joy and creativity in relationships between human beings (Brown, 2010). Besides that, the need to illustrate instead of telling the client is outlined. This coincides with clearly communicating or teaching the expertise or process of the agency instead of just talking about the results. It also states that one needs to say what they mean which directly coincides with the insight on being critical from the research.

Furthermore, the important personal chemistry aspect to client relations as outlined in the literature review is explained in the book as a characteristic of trust. This depicts how people trust other people and not institutions. Thus, the designer must show an interest in the client, show understanding (in the client and the organization) and truly empathize with them. To build trust the designer is to involve the client in the process as was defined in the research. Finally, another one of the characteristics of trust is that it assumes a two way relationship and thus cannot be forced by unilateral incentive. Trust grows rather than appears so time is needed to evolve if starting with a delivering relation (figure 5). However, a designer will need to convince the client on many occasions and when that happens it is important that is done by finding common ground (Dhar, 2018).



## 4.2 Conversations with consultants

The five consultants each have more than ten years of experience in their field (except for one who has more than five). These are shown in figure 16.

Consultant	Company	Expertise
Jeroen van Erp	Fabrique	Innovation strategist
Roderick Martens	Makerstreet	Innovation & marketing
Boris Jocking	Koos Service Design	Service Design
Lawrie McLaren	BCW Global	Public affairs & corporate communications
Jan Willem van Leeuwen	Avanze Human Development	Training & coaching

Figure 16: Consultants conferred

Due to their different expertise they have taught themselves different focal points and approaches to optimally manage their client relations. Thus the discussions with them focused on their experience of what worked and what didn't. Besides that the importance of certain activities and signals to the relationships were discussed.

The importance of recognizing the client as a person and thereby needing to understand their motives, priorities and influences was often expressed as being a crucial first step. Here finding a balance of personal and business aspects in the relationship is advised. That includes showing true interest in the client and being authentic. The creative is helping the client innovate and should thereby share the responsibility to help them bring their idea to life and gain internal fame. By creating a team feeling and closely working together throughout the project this can be achieved. While doing this the creative needs to have the client think with them throughout the project to make discoveries themselves as a way to create a 'we' feeling. Besides that, knowing the company culture is also essential as this determines what to propose or not to propose (based on how future oriented they are for example). This helps the creative tailor their work to the client company. This knowledge on the client and the company can be gained by speaking the client's language while being open and honest.

However, a successful relationship is not one sided, as it requires both parties to be open with each other. To increase the project impact and build long term relationships the creative needs to get higher up in the company. Thereby, they always need to ensure that they are talking to the problem and solution owner. All this work being extremely valuable as the goal is to build long term relationships making it easier, requiring less overhead and increasing the amount of impact the creative can make. It is also important that they express themselves, as that comfort of expression is also what is desired by the client (stated during interviews). The creative needs to have the power to persuade towards a direction which represents the best of both worlds (best for all stakeholders). The service designer stated it is important to have regular meetings with the whole team to fill each other in and realign when necessary. When not working on a project, it is important to remember that little things go a long way. The creative should contact the client regularly or

send them something when they do not have a project running with that client. The service designer expressed that it costs little effort and is easily forgotten, but the creative showing they are thinking of the client is one of the essential parts to building a trusting relationship.

## 4.3 Strategy development process

The development of a strategy to alleviate Unplugged of the problem space defined has been the purpose from the start of the project. Aligning with the insights from the literature review to holistically approach projects. The intent of the strategy is to resolve the whole problem space while guiding Unplugged towards their vision. The latter implied as that is the ultimate goal for any creative agency or company for that matter (as implied by Simon Sinek (2010) and the *Strategic design* book (2018)). For Unplugged this vision is to make their clients more human-centered. However, this is not a clearly defined and achievable goal so three stages are imagined, being the impact levels defined in the discover phase (figure 3). Therefore, Unplugged would be able to grow towards achieving that purpose by climbing the impact levels when working with clients. For the strategy, the what to do and how to do it questions would need to be answered so the designers can follow the advice to work towards their purpose.

To enable them to do so, the content for the strategy is created under three categories. These being, the external, relational and internal categories from the relational network. For each of these the necessities are created. Unplugged would need to develop a partnering relationship with their clients, play a leading role in the relationship and achieve an internal balance of guidance and autonomy. In figure 17 the result of ideating about the elements necessary to achieve that are portrayed.

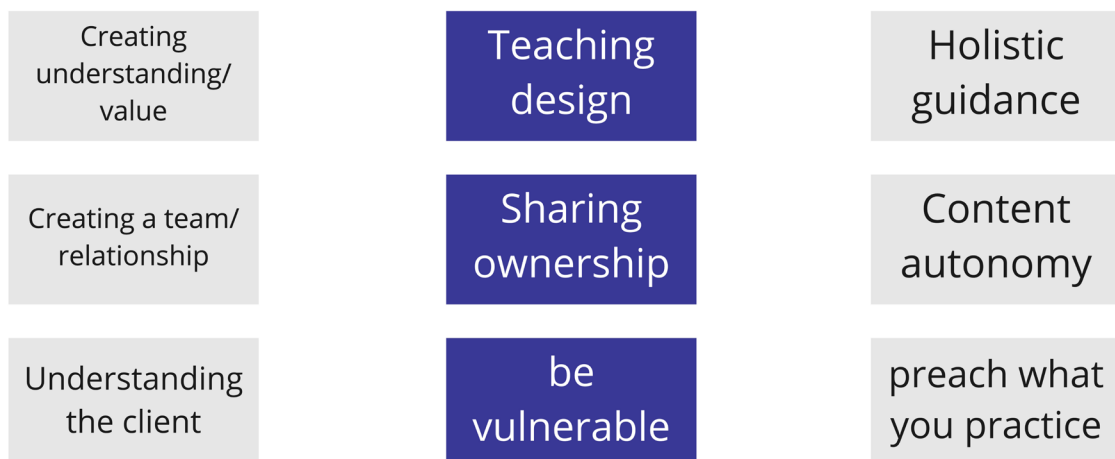


Figure 17: What is needed

As to how Unplugged would do this, the advice is further developed with a brain dump. This performed with the insights from the interviews and the literature leading to a selection of activities which could enable that, shown in figure 18.



Figure 18: How to do it

In between content ideation, the options of which to format the advice in are assessed. While discussing the practical experience of the consultants and looking into the rubric for the project a change in perspective occurred. The scope of the advice is specifically aimed at Unplugged. Since these issues are largely relevant to designers and creative agencies, the focus of the advice can be aimed at the community instead of just Unplugged. Hereby, the impact of the advice is largely increased. This meant a change in the strategy format.

Since the strategy contains advice for internal and external relational conduct, with different levels of abstraction, the choice was made to not go for a fixed format such as a roadmap for example. In combination with the personal goal to make the advice actionable for Unplugged, and with the new scope a strategy playbook is chosen. The primary internally focused advice is for creatives to set goals, reflect regularly and measure progress. This aimed at helping them grow towards their purpose. Explaining how to do so in their relationships with clients through the external advice being a set of principles by which creatives can abide. In doing so, they can optimally build lasting relationships conducive to an increasing impact of projects. To make this actionable, an approach is included to outline what creatives need to pay attention to during their projects. This being a list of questions to ask themselves when reflecting. Finally, to ensure they are making progress, keep a relational perspective and can recognize issues on time, a measurement system is created.

## 4.4 Workshop development process

One of the personal objectives of this project is to have the advice implemented by Unplugged. To make it actionable, it would include a tangible element namely an interaction. In accordance with the advice an ideation for possible interactions is undergone. Determining that the most vital moment of the relationship for a single interaction to be created is at its very beginning. Therefore, defining the purpose of the interaction as a moment for Unplugged and the client to understand each other on a personal level with the possibility to include some collaborative visioning for the project or relationship. To a certain extent, this session would work as a sensitization of both parties before diving into the content. To that extent, through creation of metaphors for the intended purpose different possibilities are explored. An example can be seen in figure 19.

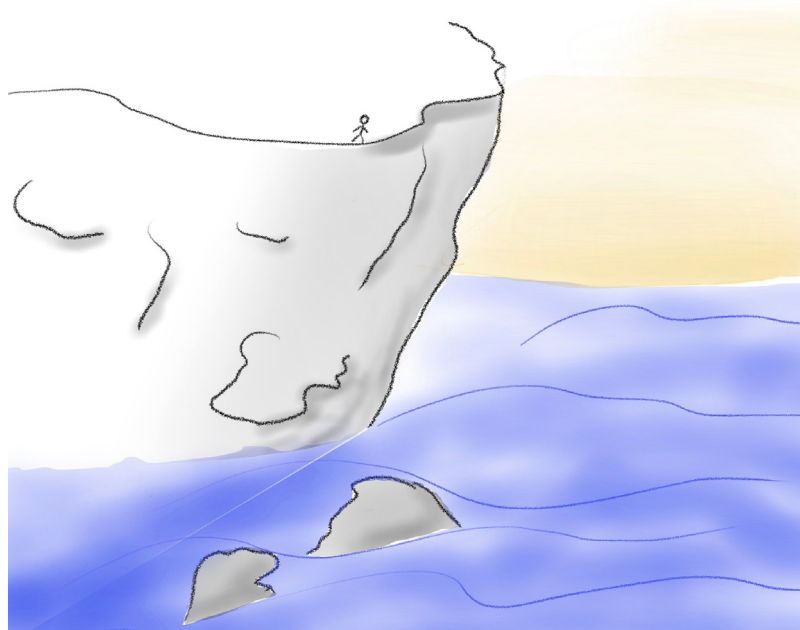


Figure 19: Cliff jump

Here, the metaphor jumping off a cliff based on another person's advice is shown. This, together with metaphors as 'letting yourself fall back into someones arms' representing the basis for questions such as how can an interaction create trust. What is necessary for a person to perform that interaction. Exploring answers such as; when the other goes first. Representing a need for Unplugged to somehow take the first step in the interaction, possibly with physical exercises. Ultimately to have both parties open up. Represented by the following metaphor: People live with their walls and you want them to open the gate.

With the change in scope of the strategy from Unplugged client relationship approach, to strategy playbook delineating an approach for creative agency-client relationships, the purpose of the interaction session also changed. As the advice is no longer focussed on Unplugged their context, the interaction to create openness and trust has become a workshop to make the advice clear and actionable. This decision made on the basis that in my own advice it is stated that the designer needs to create understanding for the client. Furthermore, the previous graduation student that worked with Unplugged handed over their result which was thus not

implemented and during the discussions with the consultants they expressed the need to ensure Unplugged would implement the advice.

Therefore, a new exploration into the possibilities of making the strategy playbook clear and the advice implementable was undergone. The session is called a workshop as that is the most applicable term for it in the field of design. The activities took on many shapes during ideation. Starting with role playing games to have some play the client as others would approach them in accordance with the advice. This would however not have the designer practice all the principles so a scenario game is explored. Here the purpose would be to see if they pick up on the hierarchy present in the scenario. But again, this doesn't cover much of the strategy playbook. Therefore, creating a case study in which they would need to outline their approach could work well. Here, the questions of the approach are given to keep all principles in mind. That way, they practice using the questions too. Since these are divided into three categories, representing different stages of a project, the case will need to have three parts. Now the designers will get to practice implementing the questions and approaching in accordance with the principles, but first a level of common understanding needs to be established.

To achieve this the possibility of having the designers write down their interpretations and then discussing those in group was entertained. However, this could lead to too much variety, so it needed to be more constrained. Therefore, two statements will be composed of each principle. One will represent the meaning of the principle and the other a variation thereof. This way, the statements can be discussed and a general consensus can be reached on which is the right one, ensuring everyone understands why.

Combining the *principles game* and the case study, creates understanding and implementability of the principles and the approach, which leaves *the impact measurement* and *rule of thumb* of the playbook still undiscussed. The former can be filled in by the designers for fictive projects as doing it for their prior projects could create ambiguity. The latter is first explored as an advice given at the beginning of the workshop, however now determined as a call to action at the end. In this way, the workshop is undergone with Unplugged, making the advice clear and implementable, ending on a call to action for them to define their purpose and start implementing straight away!

## 4.5 Conclusion

The further research and discussions with consultants has lead to a great combination of theoretical and practical insights which were put to use during the ideation on the strategy playbook and workshop. The main insights are listed below:

- There needs to be a shared vision with the client
- The person with whom the agency works needs to be the problem and solution owner
- An agency purpose needs to be determined and communicated
- To grow impact the creative needs to align with people higher up in the organization
- To create trust the creative must go first and take risk
- The creative needs to express themselves
- People trust people, not institutions. Thus the relationship requires empathy
- The creative must teach the client, not just state the solution
- Trust assumes a two way relationship and thus cannot be forced by unilateral incentive
- Trust grows rather than appears
- The creative is to be authentic, persuasive, expressive and create a team feeling
- The creative is to closely collaborate and/or stay in regular/close contact

The process of their development is explained with some examples of the content generated before getting to the first proposal. The largest iteration in this process was the step from an advice for Unplugged to a strategy playbook for creative agency-client relationships. Because of which the workshop went from a first encounter between agency and client interaction to the application of the advice to Unplugged's context for them to understand and implement it through a case. The final elements now in place, the strategy playbook and workshop will be proposed and the feedback used to iterate upon the content and format in the deliver phase.

5



# Deliver

The first version of the strategy playbook and outline of the workshop are delivered to gather feedback and iterate. The iterations will shortly be outlined and the final elements of the playbook and workshop explained. To validate the aptitude of the playbook, the resolution of the problem space shown in the relational network at the end of the define phase is explained.

## 5.1 Strategy playbook defining process

The playbook was first presented containing the principles, the approach, the impact measurement and at the end the rule of thumb and Golden circle. The feedback lead to adaptations to create a more coherent playbook between elements and further develop the approach and impact measurement.

*The approach to client relations* was first presented as can be seen in figure 20. Here, the timeline insinuates that the questions are to be read one at a time in sequence. Also, because of the relation to projects, it looks like a list of questions to be asked throughout the project.

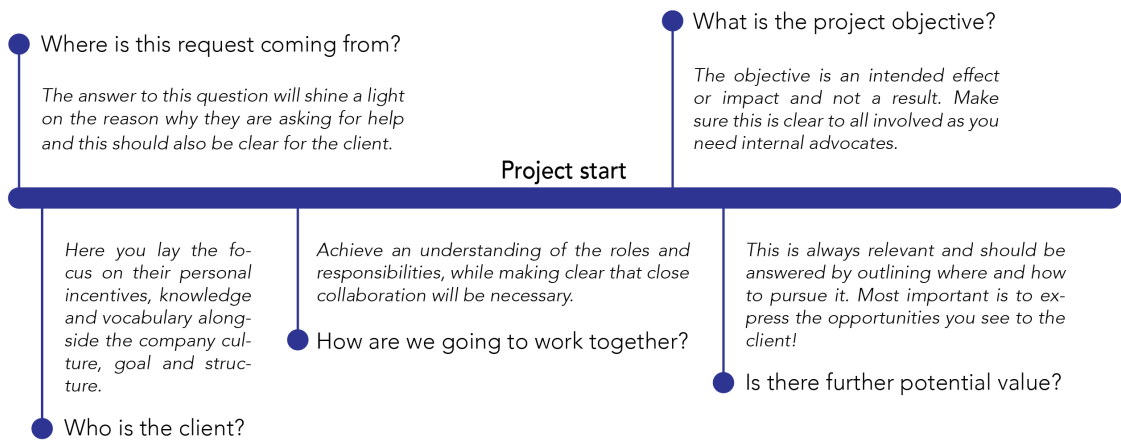


Figure 20: Timeline approach to client relations

However, the questions are divided into sets of three questions which follow upon each other and relate to each principle. Therefore, the timeline was removed and a structure linking the questions to the principles created. The emphasis placed on the three questions following upon each other and relating each to a different period of the project. This can be seen in figure 21.

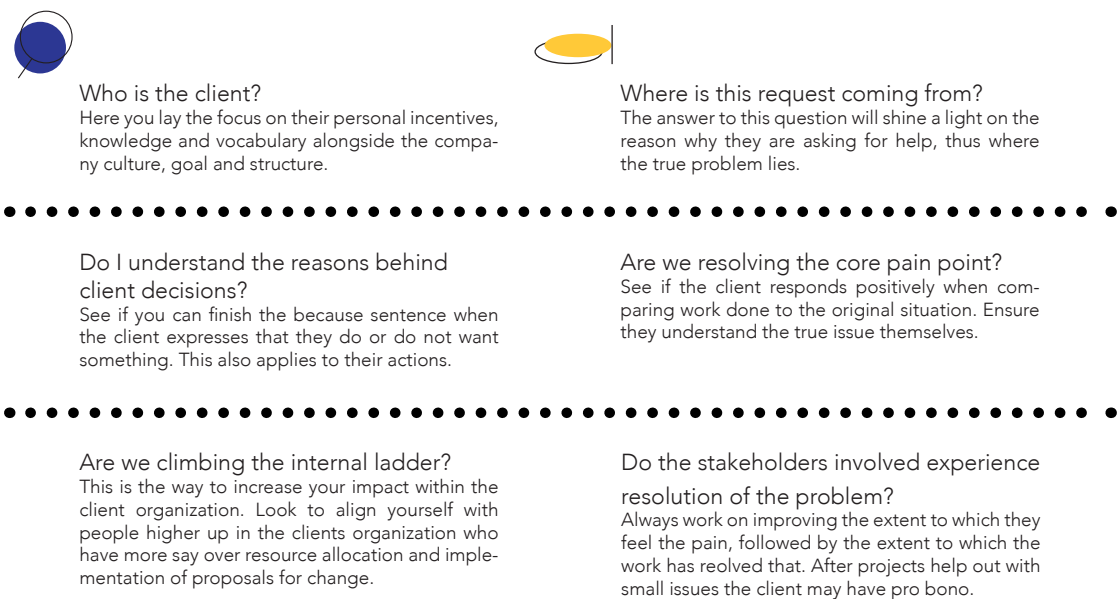


Figure 21: Structured approach to client relations

The clarity in relations between questions and the principles now achieved through the clear structure, a new problem arises. The overload of information and incoherence of the graphical layout in relation to the other elements didn't do the term playbook justice. Hence, while developing the workshop the idea arose to create question cards. This would be relevant during the workshop as they can be handed out without having to hand over the entire playbook which would compromise the purpose of the workshop. Also, after handing over the strategy playbook to Unplugged at the end of the project it is much more handy and intuitive to have the credit card size question cards. To clearly portray the relevant and coinciding principles, the cards were created using the symbols and colors of their respective principles. The 'project start', 'during project' and 'project end' statements placed on the front to delineate of which question set they are part. See *the approach to client relations* part of the Strategy playbook description for the question cards.

*The impact measurement* was first created as two visual measurement tools. One intended as an overall agency growth measurement. This was done by plotting the clients, divided on three impact levels, over time as can be seen in figure 22.

### Agency impact

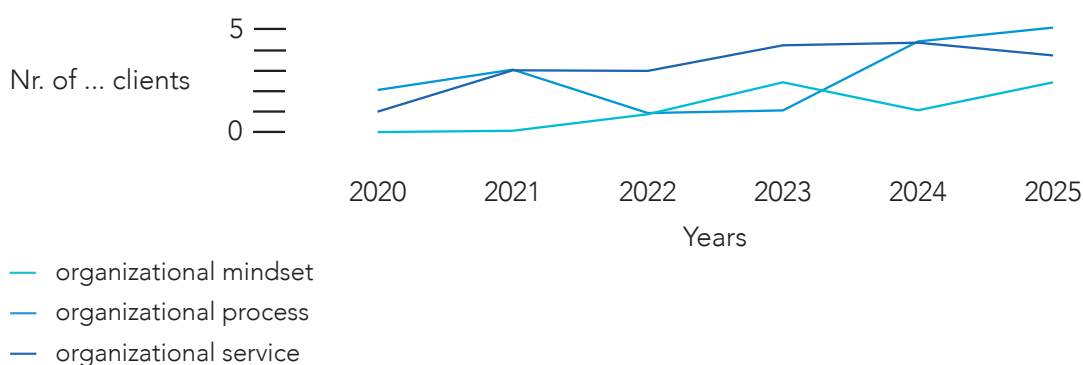


Figure 22: Agency impact graph

The issue with this graph being that it lacked in clarity and didn't necessary align with the advice of the playbook. It does measure impact, which is the direct measure of growth towards purpose, however the advice is not just to grow in quantity but build and foster relationships with clients. Therefore, and because of a lack of clarity, a new ideation was undergone to create a graph that did portray the essence of the advice (see sketches in appendix g). Starting by defining the purpose, which is to represent growth as building relationships with clients with as a consequence growth in impact. Through the ideation, where other visual representations and categories were explored, two changes were selected. First, the categories contact and lost client were added. This being ultimately important as any lost client should be investigated to ensure that is avoided in the future (unless this was a conscious choice) and the contact clients should at a certain point sign a contract for a new project. In this way, not only the paying clients are accounted for, but they all are. Second, a bar chart was chosen as it represents this data much more clearly allowing for easy comparison between different years.

The other was intended as a measure for the growth in impact of the relationship with a given client. This shown by plotting the projects with that client on the graph as seen in figure 23.

### Impact on (client name)

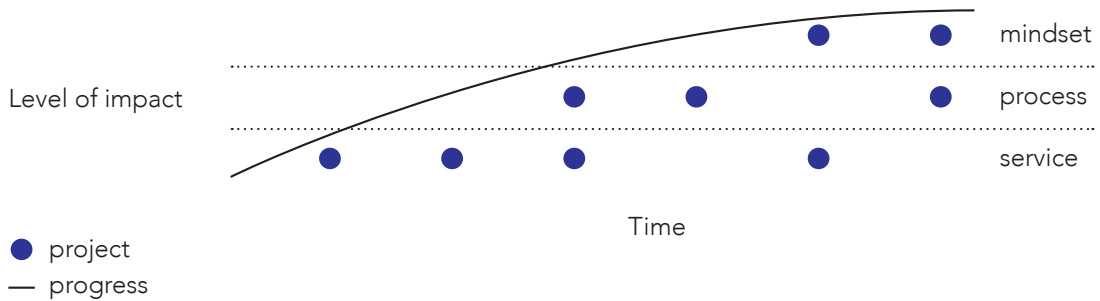


Figure 23: Impact on client graph

This graph also lacked in clarity and specificity. The dots not depicting project sizes and the line not accurately depicting relationship health. Therefore, to create a graph which achieved its purpose and brings way to questions about the client relationship the ideation was commenced (see sketches in appendix g). The information from these graphs feeds the data for the other. Therefore, to identify issues or relationship health the agency is to look into these graphs. To that extent, it needs to be specific as to create understanding on what is going on and question how to improve or adapt.

Thereby, the two new categories from the other graph are also added here. However, the contact clients are divided into contact and no contact. That way, the agency can see if a client has not bought a project in a while or the designers are not in contact with the client. The latter is something which should never happen, so to stress the urgency of staying in contact, a client is considered lost after two quarters of having no contact. Thus, the graph is divided up into fiscal quarters in order to see more specificity when client are paying for projects and how long those projects run for. Finally, using a bar chart with horizontal bars and the same color code to maintain clarity, the graph can now be read to assess the health of the relationship through impact. This, through the horizontal hierarchy present to see if the projects grow in impact and later are realized through lower impact level projects.

## 5.2 Strategy playbook

The combination of insights from the research, literature reviews, discussions with the consultants and feedback allows for the synthesis of all insights into an advice. This advice is presented in the form of a strategy playbook. The playbook is created to have designers, creatives and young creative agencies approach their business relationships with the right mindset and purpose, clarity on how to conduct themselves and to measure their impact. Through those elements the overall purpose is to maximize their impact and personal growth while building meaningful client relationships based on trust and honesty. The playbook consist of three parts that coincide with the three elements described. These are respectively *the principles to live by*, *the approach to client relations* and *the impact measurement*. The hierarchy of information follows the guidelines of the Golden Circle as described in the previous phase. Thereby, *the principles to live by* outline with what mindset and approach to manage the client relationships to best achieve the agency's purpose (why). *The approach to client relations* shows 'how' to reflect to best keep in line with the principles and optimally manage the relationship. Finally, *the impact measurement* is a visual tool to keep track of progress (what). This being essential as performance measurement links the strategy to the performance of it (Parry & Turner, 2006). These three elements of the playbook enabling a creative to apply *The rule of thumb*:

1. Set goals
2. Reflect regularly
3. Measure progress

This rule has been created from the Design and Creative Leadership literature together with insights from *The trusted Advisor* and *Strategic Design* book and the discussions with expert consultants. All delineate a need for some form of envisioning or goal setting. Thereby the rule to set goals is meant to have designers define their purpose representing the ultimate goal and have each goal 'below' it (relationship, project, project phases, etc.) represent a little step in that direction. The rule to reflect regularly comes, amongst other sources, straight from the client holding literature and was advised by the expert consultants as it provides oversight, mutual understanding and the possibility to realign efforts if necessary to achieve the previously determined goals. Finally, the rule to measure progress is essential to any business as shown in the leadership literature as it allows the agency to see the 'big picture' of how they are progressing towards their purpose. If that is going well it allows for celebration and reward (which is important for motivation), if not it provides evidence for change. If goals are not set then the agency cannot know where they are headed or align with a client, if reflections don't happen they cannot anticipate issues and if progress is not measured then there is no telling if they are or aren't working towards their goal.

### 5.2.1 The principles to live by

There are six principles outlined in the strategy playbook. These are:



## People make a client

This principle is built from an overwhelming amount of evidence and advice from the consultants that what the creative needs to do when going to work with a client is get to know them and the organization they work in. This also includes the advice of showing interest in the person from *The trusted advisor* book (Maister et al., 2012). The literature on agency-client relations placing chemistry factors or personal fit as the most influential to the relationship (Fam & Waller, 2008). Thus to ensure designers and creatives empathize with the client and their context (organization) this principle was drawn up.



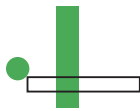
## Get in it for the long run

This principle is derived from the literature and was directly advised in the expert consultant interviews where they pointed at the fact that building a trusting relationship takes time and effort but leads to greater impact. Thus the investment of resources in long term relationships pays out several times more than investing in new clients for singular projects. Long term relationships also allow for investment in knowledge sharing as to teach the client to become the optimal client. At the same time the relationship can grow to a partnering or facilitating one which allows for more impact. Thus to create understanding and build a partnering relationship which is optimal for creativity and impact creation the mindset of the designer or creative needs to be set on the long run. This allowing them to see opportunities throughout projects and not be bound to a singular project scope.



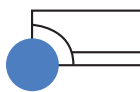
## Preach what you practice

This principle is an inversion of the saying 'practice what you preach'. Here the meaning becomes to teach the clients the ways of design for them to understand the value of what the agency offers. The Service Design literature states that the client is the unique determiner of value (Vargo & Lusch, 2016) and in the relational literature it says that value has a direct effect on loyalty (Levin et al., 2016). When taking this into account with the client type literature, where it is stated that a novice client will make counterproductive decisions and not be able to properly evaluate the work done (Diaz-Mendez & Saren, 2019), the necessity for teaching the clients is emboldened. Furthermore, ambiguity has shown to have a negative effect on relationships with clients (Keegan et al., 2017) and therefore agencies do not want them to feel like they are in the dark and need to take over control. So, as stated in the Design Thinking beliefs, the creative is to teach others (clients) and shape their (designer and client collaboration) environment (Plattner et al., 2012).



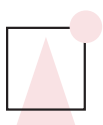
## Be vulnerable

This principle is the representation of taking a leading role while steering clear of the connotation of arrogance that leaders have gotten. *The trusted advisor* book (Maister et al., 2012) states that one of the characteristics of trust is the perceived personal risk taken. Therefore, the creative needs to take the first step. It also states that there needs to be a clear understanding that the designer is taking the lead (trustee) and the client is following their lead (truster). This also correlates with the advice from the expert consultants as they said that the client is taking a risk by hiring an external agency and sharing the load has a positive effect on the relationship and project. Thereby, one of the Design Thinking beliefs is that failure is opportunity and that is the mentality that needs to show for the clients (Plattner et al., 2012).



## Be yourself

This principle is meant to ground the designer as to not try to be someone else since that will work counterproductively for the relationship. Honesty is highly influential when it comes to the client trusting the designer as stated in the leadership literature (Mayer et al., 1995). Therefore, being authentic is the starting point for an honest relationship. At the same time, the creative needs to express themselves and say what they mean. This is advised in *The trusted advisor* book (Maister et al., 2012) and by the expert consultants. The creative is to use their strengths such as their empathic ability and curiosity to their advantage to ask open questions and uncover who the client is and how to align incentives. Here, it is also essential that they are critical about the work as that is, to a certain extent, what the client is paying them for. So they need to be open about who they are and express their opinion.

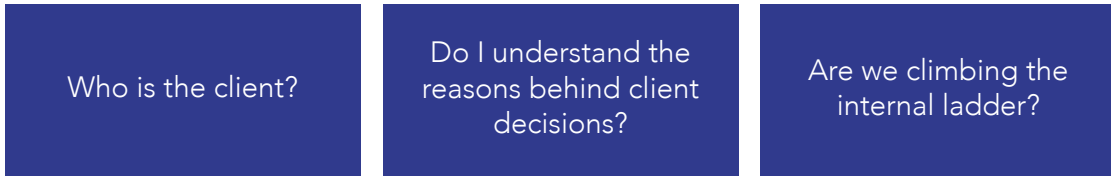


## Find common ground

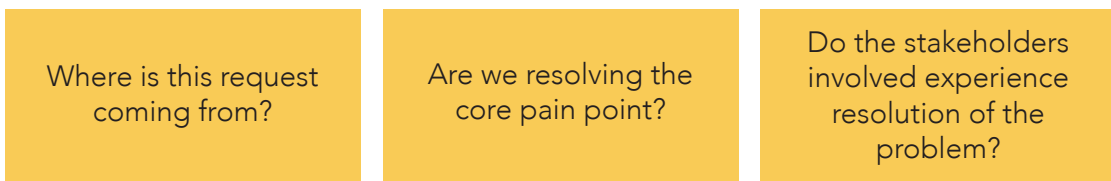
This principle is derived from the advice given by the experts and experience of a long time debating champion Julia Dhar. The way to convince a person of an idea is to find a common place of understanding and explain the train of thought from there. This is something that the designers must apply as they are to lead the projects and relationships as defined in *The trusted advisor* book (Maister et al., 2012). This also correlates with the literature on agency-client relations where is stated that the comprehensiveness of information effects the successful completion of the project (van de Sanden, 2011). Thus if the information follows a logical order from a place of understanding the client is highly likely to understand.

## 5.2.2 The approach to client relations

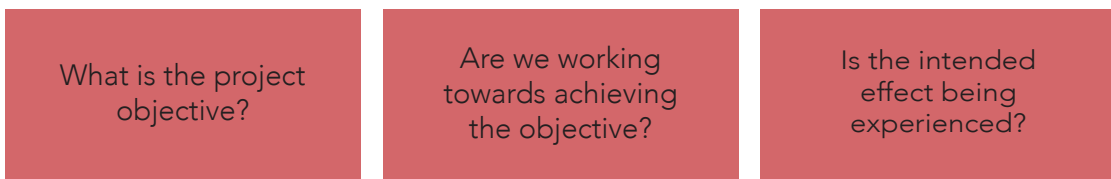
There are six sets of three questions delineated in the strategy playbook as part of *the approach to client relations*. For each set the first question is for the designer to answer at the beginning of the project, the second while reflecting throughout the project and the third while rapping up or after the project. These are:



This set of questions align with the principle 'people make a client' and is aimed at helping designers understand the client as a person and organization. The evidence for the necessity of finding a personal connection is outlined in the agency-client relation literature as the most important factor (Fam & Waller, 2008). Thereby, the showing of interest in the other person is essential to building a trusting relationship as stated in *The trusted advisor* book (Maister et al., 2012). The last question pointing towards the necessity of aligning with people higher up in the organization to increase impact as advised by the expert consultants.



This set of questions align with the principle 'get in it for the long run' and is aimed at helping designers finding and focusing their efforts on resolving the true cause of the problem. This will cause the largest perceived relief or benefit and thus likely happiness and revenue. Doing this was advised by the expert consultants and described as part of the ethos of Service Designers in the literature (Fayard et al., 2017).



This set of questions align with the principle 'preach what you practice' and is aimed at helping designers define and work towards the vision together with the client. This increasing loyalty, as stated in the relational literature (Levin et al., 2016), through better understanding of the progress being made. The last question aimed at checking if this effect is indeed being experienced to make sure the value being created is maximized.



How are we going to work together?

Are we closely collaborating?

Am I still in regular contact with the client?

This set of questions align with the principle 'be vulnerable' and is aimed at helping designers determining how they will collaborate with the client. As every client is different the way to collaborate is different. However, as advised by the expert consultants it is essential to always closely collaborate and have the client think with the designer to create a team feeling. The last question ensuring that the designer does not forget to stay in touch with the client after projects to let them know they are being thought of. In this way the client will contact the designer when they have a problem or will refer them making it more of a two way relationship. This being necessary for mutual trust.

Are there further opportunities?

Am I expressing the opportunities I notice?

Are further valuable opportunities perceived and pursued?

This set of questions align with the principle 'be yourself' and is aimed at helping designers be on the lookout for further opportunity and express it. *The trusted advisor* book (Maister et al., 2012) explains how this is essential to building the relationship. Further, as clients expect this expertise it will increase their perceived value and thus trust. The last question is to ensure that the opportunities are also clearly translated for the client so that they can understand the opportunity.

What do we have in common?

Are our visions aligned?

Does the client see further necessity for change with us?

This set of questions align with the principle 'find common ground' and is aimed at helping designers identify similarities and align with the client. As expressed in the *Strategy design book* (Calabretta et al., 2018) alignment of visions is necessary for the proper conduct of a project. Otherwise unclarity will negatively effect the collaboration. The effectiveness of persuasion through common ground explained in a TED talk by Julia Dhar (2018). The last question aimed at seeing if the client has learned enough to understand the opportunity that working together with the agency offers.

### 5.2.3 The impact measurement

There are two visual measurement tools shown in the strategy playbook. The first plots the progress of the agency towards their ultimate goal (thus with all clients). The second is to measure the progress the agency makes with each client separately. These visual measurement tools are created to portray the amount of impact in a quantitative way since that is determined as the most important factor to make progress on or work towards (see chapter research on relations). The progress has been divided over two graphs because it is important to ensure progress is being made in every client relationship and not just the overall accumulation. Every client is important as with each the agency is building a meaningful relationship and that is not to be forgotten. Thereby, the individual client graphs allow for assessment of the relationship health which in the overall graph is not visible.

The agency's impact portfolio graph (figure 24) portrays the impact in number of clients and the type of client per year. There are respectively three impact levels defined; organizational service, process and transformation clients. Each client being placed in a category based on the highest level project conducted with them in that year (gathered from the relationship impact portfolio graph). The agency should primarily seek to increase not the amount of clients, but the level of impact at which they operate with their clients to evolve towards their purpose. The impact levels also correlate with growing relationship, client design knowledge and roles which are all crucial to successful projects and relationships. Since the focus is to build the relationships with clients, contact and lost clients have also been added. Contact clients being clients with which the agency communicates but whom have not paid for a project in that year. This is cause for discussion with the creative who is in contact with that client to see how new projects can be started. When there is no contact with a client for two quarters they are considered a lost client. This is something that should not happen and therefore can be used to reflect and ensure that is avoided in the future. (the graph content does not show an exemplary relationship)

#### Agency impact portfolio

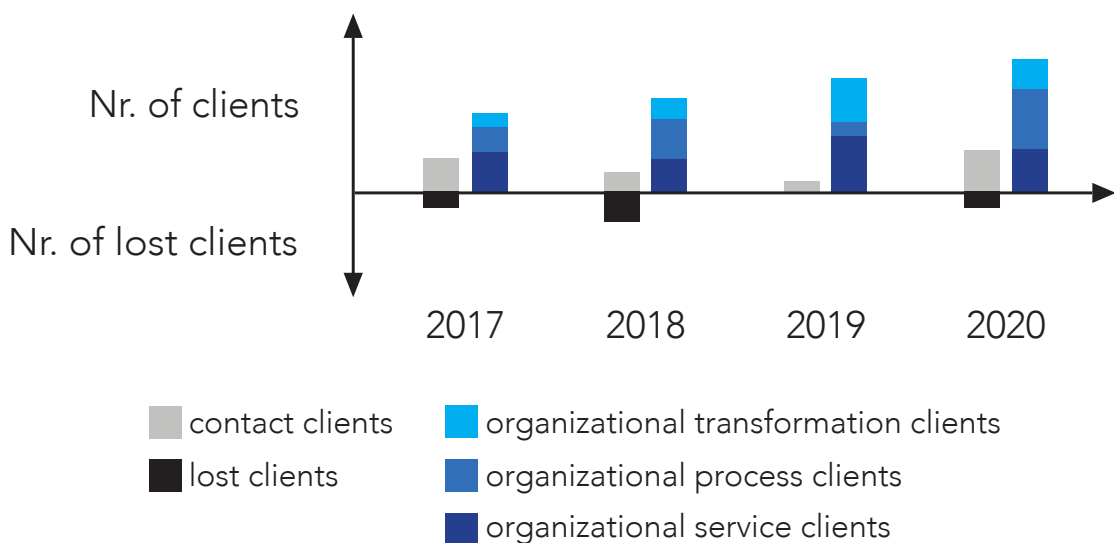


Figure 24: The agency impact portfolio

The relationship impact portfolio graph (figure 25) allows for assessment of the relationship with each client. The categories are the same as in the agency impact portfolio graph except that they now relate to projects instead of clients. In the (no) contact category there is light grey for contact, which represents two-way communication, and dark grey for no contact with the client. The time axis has been divided into quarters and thereby projects are plotted for the amount of quarters during which they take place. A healthy relationship is represented by growth in impact level as the agency builds the client's knowledge of design and the relationship with the client. When a transformation level project is undergone, the optimal graph would then show a number of process and service level projects representing the realization of that transformation. Having come this far in the relationship, the growth to higher level impact projects (larger change/innovation) recommences as the market and industry are continuously evolving and therefore the company should too. The starting point is informed by the client's knowledge of design, as starting with a higher level project without that is possible, but would require a meticulous approach to teaching design and closely including the client during the project. When the creative is not working on a project with the client they should stay in contact with the client. Thus avoid having to plot a dark grey square for any quarter. (the graph content does not show an exemplary relationship)

### Relationship impact portfolio

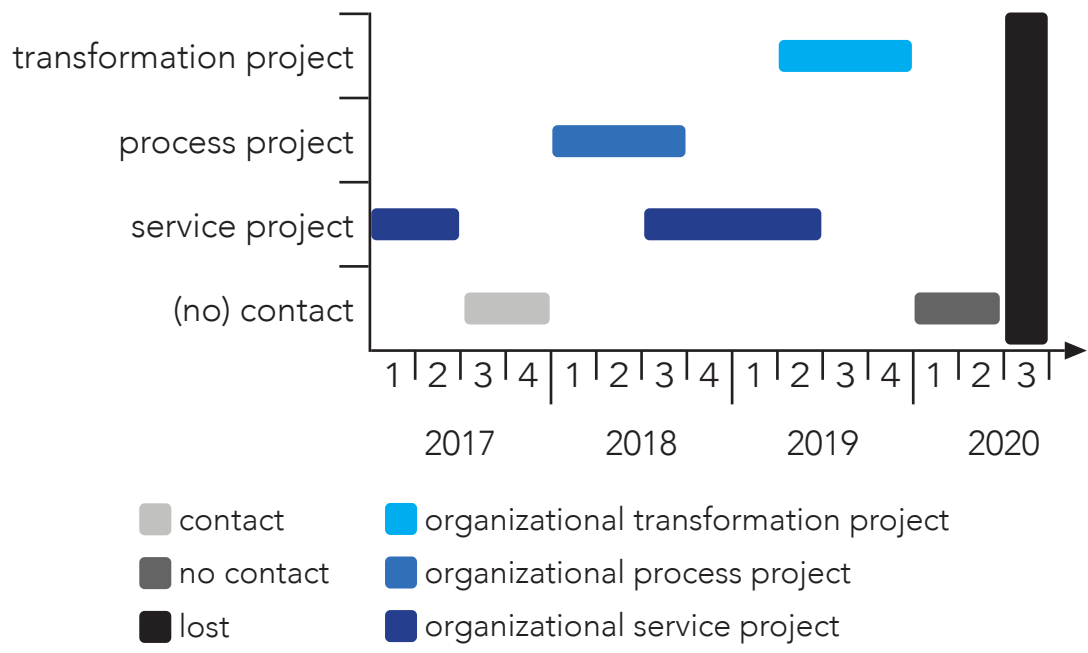


Figure 25: The relationship impact portfolio

The agency graph is to be assessed once a year and the relationship graph once a quarter as those are the measures used on the x-axes. Thereby, the agency graph is optimally automatically filled in by collecting the data from the relationship graphs however can also be filled in manually. The relationship graphs are to be filled in at the end of each quarter by the person either managing accounts or in charge of that relationship. To do so, they will need to place projects within the three impact levels. Therefore, criteria are created which cover the aspects that differentiate the levels, namely: scope, ownership, commitment, relationship and continuation. These can be seen on the following page:

### Organizational transformation

- The project scope is to develop a strategy with the client that advances them towards a common vision
- Top level management support (of given area, region or country when it comes to global corporations)
- The client must undertake steps towards strategy implementation during the project
- The client undergoes internal changes in mindset, systems, methods, processes and services
- There is a partnering/facilitating relationship between agency and client
- The transformation creates client understanding for the need of innovation through design by learning/applying design tools and methods themselves
- The implementation of the strategy informs new innovations on the organizational process and consequent service level which the client has agreed upon during the project

### Organizational process

- The project scope is to improve on or create a new process for the client
- At least branch/department level management support
- The client must run tests with the new process towards implementation
- The client undergoes internal changes in people, functions or tasks to change that process
- There is a delivering/partnering relationship between agency and client
- The change in process lays the groundwork (through created client insight) for organizational transformation level innovations
- The implementation of the process informs new innovations on the organizational service level which the client has agreed upon during the project

### Organizational service

- The project scope is to improve on or create a new product or service for the clients customers
- At least product owner level support
- The client must implement the new product or service
- The client undergoes the necessary internal changes in operations to provide the new service or product
- There is a delivering/partnering relationship between agency and client
- This change in offering lays the groundwork (through created client insight) for organizational process level innovations

Through assessment of projects along these criteria, they can then be plotted on the coinciding impact level. The understanding of which will enable to see the projects in a larger whole, namely as stepping stones in the relationship to slowly transform the clients organization towards the vision.

## 5.3 Resolution of the problem space

The strategy playbook is tailored to resolve the problem space defined in the research. The relational network was the starting point for the development of the strategy. Thereby, it was ensured that the problem space is resolved with the playbook. This is explained by relating the clusters or issues in the relational network to the principles in the strategy playbook.

First of all, the main issue 'client knowledge of design' is directly resolved through the advice 'preach what you practice' as it describes the teaching of design to the client to build a knowledge-based client relationship. The clarity issue on the internal side, namely 'understanding of client' resolved through the first principle 'people make a client'. This strongly emphasizes the necessity to empathize with the client and client organization for understanding. All the issues relating to a lack of 'clarity' in the relationship to be resolved through meticulous use of *the approach to client relations*. Use of this approach will remind the designer to maintain clarity and understanding with the client throughout the project(s).

Thus, by combining the aforementioned 'preach what you practice' principle with the 'be vulnerable' principle the 'understanding of value' issue should be resolved as the necessary knowledge for understanding is taught and then the process is approached collaboratively lead by the designer. The 'closeness to the client' issue being resolved with the advice to 'get in it for the long run' as that lays the evidence to invest in and build a trusting relationship. As stated in the define phase, the 'independence from Makerstreet' will grow as a result of the 'understanding of value' and through the close relationship built with the client. The latter highly increasing the chance of 'longer projects' together with their better understanding of value and general clarity as that has proven to increase loyalty. The 'reflections' as one of the three parts of the *rule of thumb* and applied by asking the questions in *the approach to client relations* is thereby directly resolved.

Further, through the advice to 'be yourself' and 'find common ground' the 'Unplugged to be critical' and 'professionalism' issues are respectively directly addressed. This, as the designers will then be more expressive and persuasive which the lack of was expressed as one of the causes for lacking professionalism. The internal issues on the balance of 'internal guidance' and 'autonomy' being resolved if the managers, heads or leaders of the agency apply the *rule of thumb* and measure progress with *the Impact measurement*, as this will align everyone behind a clear purpose while giving them the freedom to decide how to make their impact. This being possible as regular reflection allows for change when issues are noticed or lack in progress is measured. When they implement the 'be vulnerable' advice this will likely resolve the 'unity colleagues' issue as the whole point of that principle is to lead by example and create a team feeling.

## 5.4 The workshop

The workshop is created to make the advice clear and actionable for Unplugged. As explained in the previous phase, the materials such as the case study and principle statements have been developed to allow for discussion to create a common understanding and practicing of the tools. Thus to cover the whole advice, there will be three exercises coinciding with the three parts of the strategy playbook. However, before diving into those, there needs to be an understanding not only of the advice but of Unplugged's current situation. Therefore, the workshop will start with an introduction of the project and an explanation and discussion about the relational network.

Once the current situation is understood and agreed upon, then the building of understanding is commenced with the *principles game*. The games are undergone in groups of three, to reach a consensus before discussing with the whole group. Here there are two statements for each principle which are purposefully similar to evoke discussion. One of the two statements entails the intent of the principle and the group discussion will lead towards that statement. After this common understanding is built, the case is presented. The case study is divided up into three phases to allow for use of the entire approach to client relations tool (question cards) and application of the principles throughout a project. This will function in the same way as the previous game as there will be groups of three that need to compose their answers and then propose to the whole group. The question cards are used, each set corresponding with the phase of the case, for the designers to see the situation through that lens and come up with answers and propositions. It will be interesting to see to what extent further opportunities are proposed as the following exercise entails *the impact measurement*. After explaining the graphs and categorizations, they will be asked to plot three fictive projects along the three different impact levels. This rounding up the elements of the playbook and thereby the games which can be found in appendix h.

Leading to the last part of the workshop, which is extremely important because it is the first crucial step for Unplugged to make and thereby the call to action. Explaining the *rule of thumb* and how it all starts with defining their purpose. As everything else is informed by their purpose. Once that is defined, they can then apply the *rule of thumb* with use of the advice and tools they learnt in the workshop. After inquiring them to define their purpose, the workshop will be rounded up with a discussion based on the questions and comments of Unplugged. Then, Unplugged will have everything they need to take the strategy playbook and push themselves to apply it for success, happiness and growth through the meaningful relationships they build. The workshop could not be performed during the project due to the time constraints, because of which the knowledge gained from conducting the workshop will be included in the thesis defense ceremony.

## 5.5 Conclusion

The further iterations of the strategy playbook lead to the book it is now. Here, the different elements support each other in helping the designer improve their client relations. The final version of the playbook shown to resolve the problem space insinuating the completion of the project. The original request from Unplugged was to look into the agency-client relationship and how that can best be undergone. The proposed playbook outlines exactly that with tools to keep them to it. Finally, the workshop will allow them to get acquainted with the playbook and hopefully ensure they implement it afterwards.





# Conclusion

The final deliverables and their development process explained, the implications of the project on the literature and practice will be outlined in the discussion. These implications are corroborated by proposals for further development of the strategy playbook elements and the limitations this project was subject to. Finally, the personal growth and achievement of goals set out at the beginning of the project are discussed in the reflection.

## 6.1 Discussion

The strategy playbook is put forward as a proactive and constructive basis for agency-client relationships. As shown, it has the potential to resolve issues found when implemented correctly. However, there is much more work to be done on the subject. For each piece of advice there are many more specific situations and therefore tools and methods that can be developed. So the deliverables of this project attempt to lay the groundwork for further research and development. That is why, this paper focuses on raising questions for the reader and gives the designers the space to interpret the questions in their own way, use that lens to look at the project and client relationship. The same goes for *the impact measurement* graphs. When looking at the client specific graph it should spark questions as to what is or isn't going well. Take the example of an agency which has many clients with whom it is in contact after project completion but which does not hook a new project afterwards: then the question arises of how to convince clients to develop a more continuous project relationship with the agency. This is relevant for each situation that can be found in the graph. Even if the project is going perfectly, the question arises as to how exactly they are achieving this and which parameters are causing it to go so well. Then more specific factors relevant to their situation can be included in the scope as being influential to the agency-client relationship. By contrast, when the graph results are not optimal, the go to system of reflection should be to look at which principle(s) are not being fully implemented by the person working with the client. There should lie the answer to the anomalies in the graph.

Overall, this project brought to light new insights on the agency-client relationship. Most of the existing literature is focused on advertising or marketing agencies' client relationships. Here, the findings from the different fields have been combined, together with leadership and the Service Design field literature, to create an optimal combination for designers. For this reason, the experts interviewed were themselves also from different fields. This allowed for the accumulation of practical and theoretical insights from several different fields for comparison and combination. The resulting advice is therefore applicable to those creative agencies in general who are seeking to develop themselves and bring in new services. Further design research should look at the impact that design has and how to categorize it or measure it (e.g. by developing more exhaustive criteria), this in turn supporting designers to develop evidence of effectiveness, importance and growth. Besides that, the project's principles could be further developed into advice that focuses on the different stages of the relationship between the agency and the client; a type of Balance score card for the field of design. This to relate the advice on the relational approach to the literature on how to conduct the design work itself.

The project was subject to several limitations. The study conducted was of a select group, namely one agency and three of their clients. Therefore, further research should look to validate the insights in larger scale studies. The interviews were conducted with clients according to openness and availability aligned to the project timescale, where in an optimal situation the interviews would be conducted both with the designers who worked on a project and the clients of that project. The findings could have benefited from a more thorough and repetitive scanning of the information gathered to assess for relations and anomalies. The conduct of the interviews themselves could also have had an influence as, due to the Covid restrictions, these had to happen via Zoom instead of in person. Similarly, there was

also no opportunity to observe the interactions that Unplugged had with its clients. Finally, for the creative process that took place during the second half of the project, it was more difficult than usual to ideate and innovate when working individually at a distance. As the research findings of this project hopefully point out, human relations and contact are extremely important and projects are optimally conducted when in close collaboration.

## 6.2 Reflection

The past semester has enabled me to gain the type of knowledge I was looking for and test the skills I wanted to test. First of all, to work with a young creative agency was an eye-opener and I am very glad to have worked with Unplugged in this respect. The agency's open mentality gave me insight into their culture and conduct. Therefore, I now have a clearer understanding what the creative work conducted at the university might look like when implemented in an agency.

Second, the ambitions I had set out at the beginning of the project have, I believe, been achieved. Even though it was going to be a challenging road, I aimed to develop a clear framework for addressing the endlessly complex problem of human relationship management in the context of creative agency and client. I hope it can be implemented and provide guidance that is practical. The communication with my own stakeholders for this project went well on all occasions though it could have been improved further by defining more specific topics and questions. I have gathered a lot of information with the interviews, some of which was informative for me but which was not used for the project. This could also relate to the fact that, with more time, I would like to have carried out a more extensive and thorough analysis of the data. Ironically, that is where Mosaic thinking in particular helped me with its emphasis on developing insights in a short amount of time. So to that extent, I am happy that I was able to implement it.

Besides the ambitions I had and skills I wanted to test for the project, I have to admit that I was personally challenged on a much deeper level. Working on this project over the past half year has caused me to reorganize the way I live my life. I have adapted in such a way that I can function as effectively as possible five days a week and enjoy the free time I have besides that. I quickly pick myself up when times are difficult and think of systems to alleviate the situation. Throughout this time, I have developed knowledge on human relationships and behavior which I have applied to my own life. In fact, the work has ended up not only informing the literature or agency practice, but has also educated me. The next steps I intend to take are very different from the ones I was intending to take back in February. I now realize that the most influential factor to pay attention to is the human factor, whether that be in relationships, work or life. In short, this project has made me more human-centered.



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