

# Creative agency - client relationship playbook.

The creative's guide to increase impact, build relationships and grow.

# Context

This playbook is the result of a one semester graduation project as part of the Strategic Product Design Master program at the TU Delft. The project was performed in collaboration with the creative agency Unplugged in Amsterdam. The purpose of this project is to deliver a clear and actionable guide for creatives to optimally manage their client relations. For myself this holds a lot of importance as throughout my education and my personal life I have spent a lot of time thinking about and iterating upon how I manage my relationships. Now as a creative this becomes

even more interesting since you often work with clients who themselves have no experience with design and creative processes. So the challenge to create clarity and persuade the client of implementing what has shown will have positive impact on either people or planet (with the necessary profit opportunity of course) has always been top of mind. However, during this graduation project I did not pursue my passion alone. Therefore, I want to thank my supervisory team Rebecca & Giulia, my company mentor Stein and everyone at Unplugged!

# Acknowledgement

Chair



Dr. Price, R.A.  
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X



# Process

The Double Diamond method was applied to create this playbook. The discover phase entailing a literature review on Service Design, leadership and agency - client relationships. The define phase built on 13 interviews that lead to a relational network defining the problem space relevant to Unplugged. Using the develop phase to gain more theoretical knowledge on relationship approaches through literature research using sources such as The Trusted Advisor book by Robert M. Galford and Strategic Design book by Giulia Calabretta. Combining this with practical knowledge from long term con-

sultants of different fields:

Jeroen van Erp - Fabrique

Roderick Martens - Makerstreet

Boris Jocking - Koos Service Design

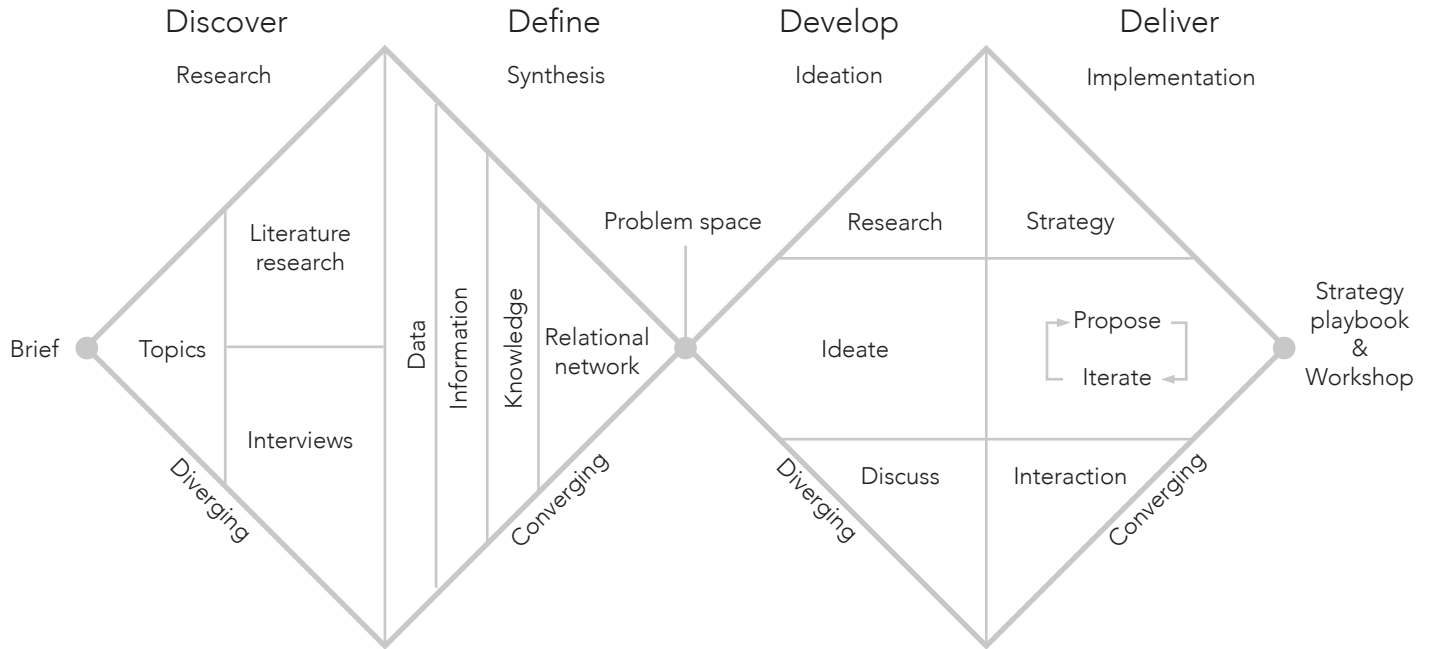
Jan Willem van Leeuwen - Avanze

Human Development

Lawrie McLaren - BCW Global

The playbook thereby delivered containing a synthesis of all information gathered to resolve the problem space as defined for Unplugged (relevant to creative agencies in general) and guide creatives through client relationships for maximum impact.

# Double diamond



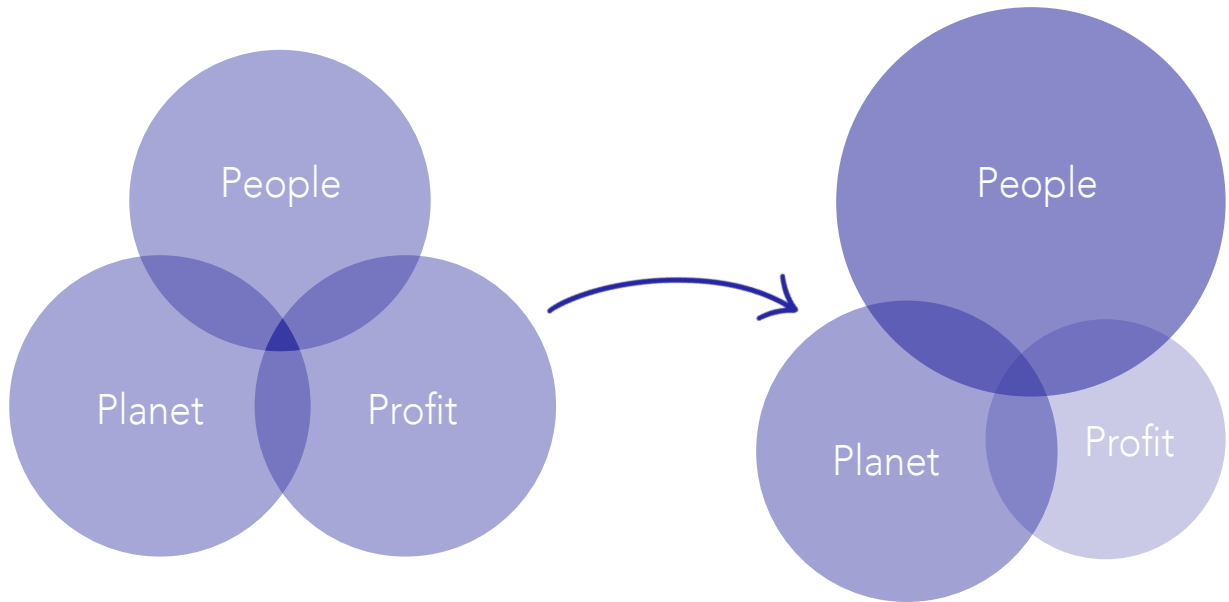
# Impact

The objective of the strategy playbook is to provide creatives with the mindset and approach to increase their impact, improve their relationships and grow as people. Hereby, focusing on the essential aspects that come into play with regard to creative agency - client relationships. Designers are not directly taught these skills and methods which leaves them unprepared for factors that can negatively influence their relationships and thereby the value and quality of the work. This being crucial for creatives as there is often a large knowledge gap with the clients.

This advice assumes the designer or creative reading it intends to have a positive impact on people and/or planet factors alongside profit. Meaning that they are not purely driven by the goal to increase revenue. The second assumption is that the reader has the capability and will to deliver quality work as perceived by the client and colleagues.

Only then can the strategy playbook be of true value to creative(s) (agencies). Empowering them to lead organizations towards a brighter future!

# Triple bottom line



# Content

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# Playbook guide

This playbook is meant for agencies or creatives who seek to improve their client relationships, internal management and growth. In order to do so follow these elements of the playbook:

1. Define your purpose and communicate it as explained under the definition.
2. Apply the rule of thumb throughout all work to grow towards your purpose.
  - 2a. Use the principles outlined to optimally work towards your goals (from purpose backward) as is the first guideline of the rule of thumb.

2b. Reflect regularly with the approach to client relations question cards in accordance with the second guideline.

2c. Measure your impact and adapt or celebrate based on the results as delineated in the third guideline.

Once you manage to go to work with the right mindset by making this approach inherent to your work flow, then you can adapt the approach and tools to the situations you experience as they unfold.

# The definition

## What is your purpose?

The very reason your agency exists

Answering the question of your existence allows you to align visions with clients and enables you to remain focused on your purpose ensuring all goals below are a little step in that direction. It is a clear message stating who you are, which is something people can get behind and work towards. An example of a purpose statement:

Making companies Human-centered

# The rule of thumb



## Set goals

To work towards your vision/ purpose/ belief through living by the principles



## Reflect regularly

To keep yourself on track through use of the approach to client relations

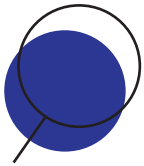


## Measure progress

To remind yourself of your growth or lack thereof through use of the impact measurement



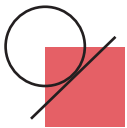
# The principles



People make a client

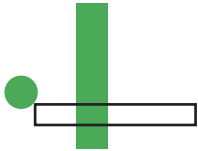


Get in it for the long run

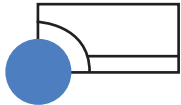


Preach what you practice

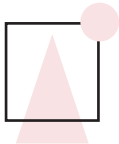
# to live by



Be vulnerable



Be yourself



Find common ground



People make a client


It is all about who is sitting at the other side  
of the table and what context they live in!

Designers are trained to empathize, which also happens to be a crucial aspect for successful client relationships. It is your job to not only empathize with the end user but also the client. They are the paying stakeholder and sole determiner of value. Therefore, you must set out to understand their interests and ambitions (both personal and work related). This will enable you to align with them on your similarities while working together. At the same time, they are part of a larger organization and thus understanding the internal politics and corporate culture is just as important (hierarchy, friends, foes,

processes, etc.). The position of the person or people you work with at the client company is also of influence as the changes you propose need to fall under their supervision. Meaning, for example, that proposing an organizational transformation to a product owner or a five year plan to someone in a two year position are highly unlikely to be implemented or even valued. So use your empathic ability to understand the client as a person and the internal workings of the organization. This allows you to propose a vision that is desirable and changes that are viable for the client.

# Get in it for the long run

You are building relationships with clients,  
not just doing a project!





For any type of request from a client, if it be a small project or long term transformation, you need to be in it for the long run. The best kind of business to have is returning clients as you can keep developing on built knowledge and understanding. You know, that even though they think all they need is a short delivery project (insights, product, service), they would benefit most from eventually implementing an organizational transformation through collaboration. However, this takes time. First, you start with the small stuff and then gradually you can start to introduce larger visions for change. This also means that when you finish a project,

you do not cease contact with the client. On a regular basis you want to know how it is going, if you can lend a helping hand or just have a chat about how they are doing. As one of the most important factors is personal compatibility/likability. At some point you will get a call from your client explaining how they have a new problem for which they need your expertise. Keep in mind that little things go a long way and you want the client to feel special. Overall, your attitude is to be an advocate for change tailored to the client. So invest in the client to earn their trust as you increase your impact.

# Preach what you practice

The background features a large red square on the right side. A thick black circle is positioned on the left, partially overlapping the red square. A thick black diagonal line runs from the bottom-left towards the top-right, also overlapping the red square and the circle.

The creative process  
is not easy to understand,  
so you must teach the basics!



Being educated in design causes certain things to become logical to the creative. Say close collaboration, building understanding through qualitative analysis, workshops, brainstorming, Design Thinking, ambiguity, complexity, flexibility, etc. However, if you are going to go through a design process and only show the client the end result, the chance of them either understanding it or wanting it will be critically low. That is why you need to include them in the process, have them closely collaborate (ask them questions, do a generative workshop, brainstorm together, etc.) but also teach them the basics. Prepare them for the ambiguity to come by explaining the process and clearly de-

fining the roles and objectives each step of the way. This can take shape through presentations or workshops. On a larger front, teach them the value of design and use all the tools at your disposition to make them understand the necessity for change through design. This can be done by showing previous work, storytelling, scenario writing and use of analogies. Become a Design Thinking representative (or other specialization) as when the client climbs the learning ladder, their attitude towards design will change. This allows you to take on a more advising role in a more partnering relationship with larger impact projects as the client will understand the value of design and trust you.

# Be vulnerable



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You are an advocate for change,  
so have some skin in the game!

It may be more comfortable to follow the clients lead and fulfill their wishes but that is not what you stand for. Take the first step, if it be in the relationship or for the project. Meaning do something for the client without guarantees. A good synonym would be to lead by example. The client is taking a large risk by hiring you and thus you need to share the risk with them. Thereby, the creation of one team, which is ultimately symbolized by the client explaining the work to others in the 'we' form, will increase the meaningfulness of the relationship and the chance of acceptance and implementation. Doing this won't only improve the work quality

and the strength of the relationship but also your personal growth. Don't be afraid to ask for help, you might be the expert but that doesn't make you all knowing, as this gives the client a sense of worth. They have a lot to add and all healthy relationships are built on a bidirectional flow of knowledge sharing. There is one aspect to being vulnerable that might be a little difficult to implement. If a mistake is made, it is crucial that you take unconditional responsibility for what happened and resolve it. These are the best learning opportunities, so no need to shove the responsibility aside if you actually want to grow and earn their respect.

Be yourself

You will spend most of your time with your clients, so authenticity is key!

You are not out to individually prove your worth to the client. You want to create value for and with the client while having a positive impact on all humans involved. By being yourself you can create an authentic relationship which will last much longer than any other. However, this also means expressing your thoughts and ideas or in other words being open. You need to be critical and challenge the client, they want to hear your opinion! No one wants a partner that only nods yes. Besides being authentic, listen and ask

open questions to better understand the client. A good start is half of the work, so get to know them right off the bat. In the end, you are spending most of your time with the client and you want them to become an advocate for the work you do. So treat them as a professional and behave like one too. By doing anything other than being honest and critical you are shooting yourself in the foot. Do, however, always direct criticism at the project content, not the people, and clearly steer towards a common vision.

# Find common ground



The way to sway, is to find  
a notion of common  
understanding and  
build your way up  
from there.

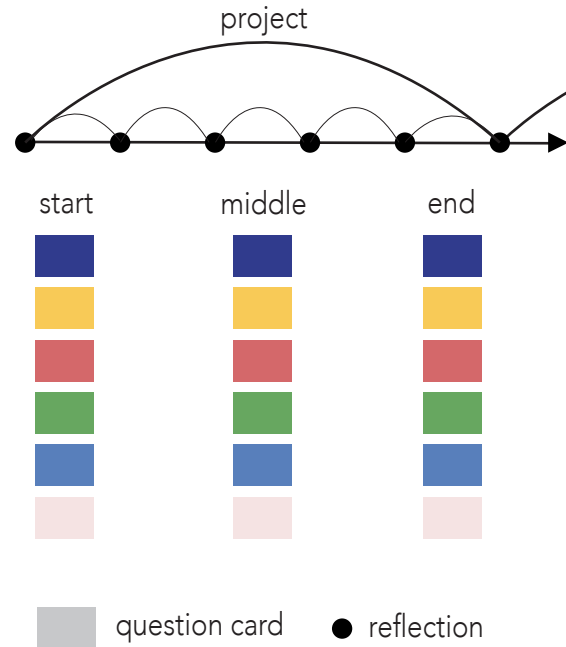
This principle is crucial for all whom intend to lead, steer, persuade, manage, etc. which is necessary if you want to make an impact. The way in which you create understanding is by finding the common ground and working your way up from there. That is why it is also the most effective way to convince people. Similar to a collaborative approach in a project, you start from common ground (a place all parties understand) and then take the others with you on a journey (your train of thought) to the notion you would like them to understand. This skill will serve you in all aspects of life, but as

you are to lead the project and relationship you need to be able to steer it in the right direction. So whenever a conflict arises or another form of dispute, try to ask open questions to understand where your paths diverge and then explain the logical relation from there. Applying this to your storytelling when explaining the vision for their future to convince them of its greater value will work wonders. Finally, speak of your belief (vision) for their future and provide the how (process) and what (activities) as proof. Never the other way around! You are selling a prosperous future not a process, methods or tools.



# The approach

When going to work on a project with a client use the question cards to keep yourself in line with the principles. The cards are divided into three groups. The first six are to be used during the beginning of the project, the second while reflecting throughout the project and the third when rounding up the project and reflecting after it has been concluded. Each card corresponds with a principle which is intended to help implement that principle in your relationship with the client. Thereby, the questions corresponding with one principle build on the other with each phase of the project. (The cards can be found in the appendix, to cut out and place on the following pages or keep wherever they serve you best.)



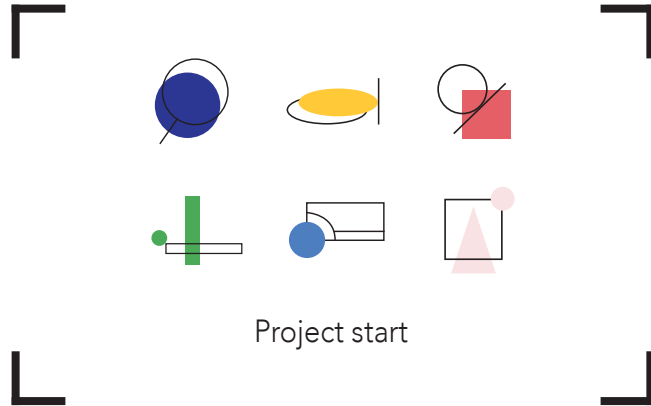
# to client relations

## Project start

Gather the insights to answer these questions as soon as possible by asking the client open questions, discussing together and looking at the situation from your expert perspective. Based on the

information you gather define how you will approach the project in accordance with the principles. Aspects that you do not uncover or determine at the start of a project could become an issue later on.

### Question cards

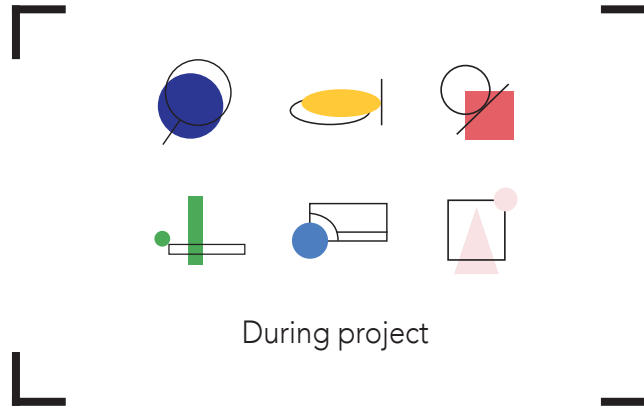


## During project

To keep yourself on track throughout projects, ask yourself these questions when regularly reflecting. Are the answers to these questions negative you are most likely not spending enough time with the

client, not closely collaborating or not having enough open discussions. So if that is the case, try to get in closer contact with the client and spend more time paying attention to what they say and do.

### Question cards

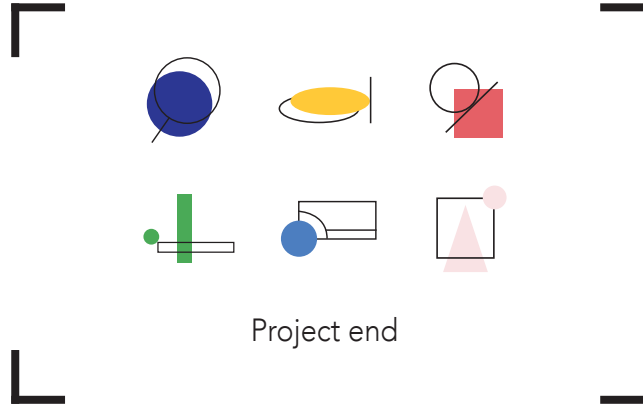


## Project end

When the project is coming to an end and afterwards, it is crucial to express further opportunities and/or set up a clear line of communication with the client to keep in touch after the project. If the client has

bought into the vision you have created together earlier on, going from project to relationship should flow naturally. Try to get in contact with people higher up to allow for larger impact projects.

### Question cards



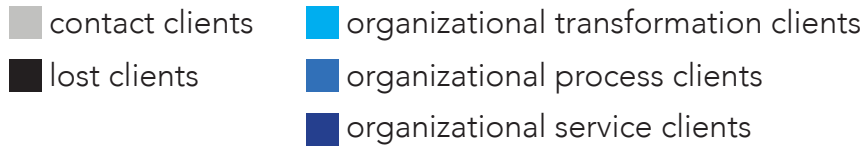
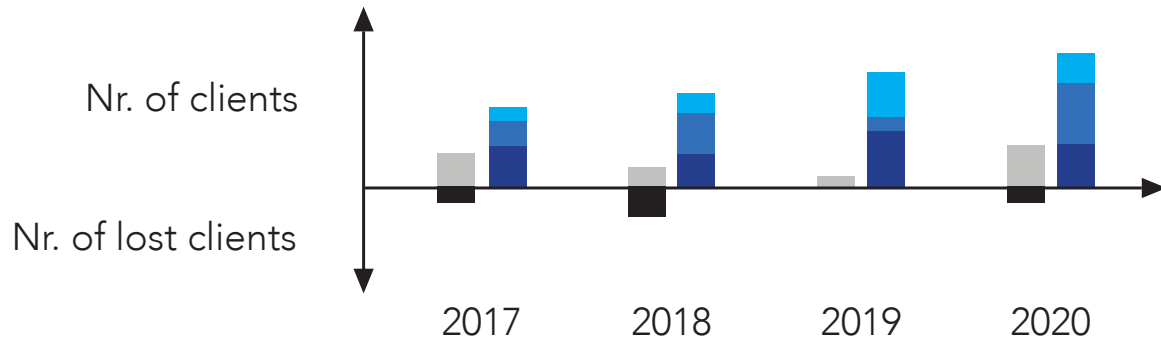


# The impact measurement

The ultimate measure of progress is that of the impact an agency makes towards their purpose. Therefore, the agency's impact portfolio graph portrays that 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 as that correlates with growing

relationship, client design knowledge and roles. 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 payed 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 represent an ideal situation)

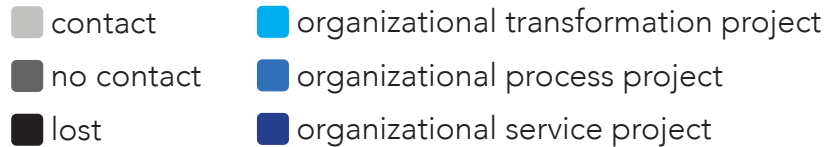
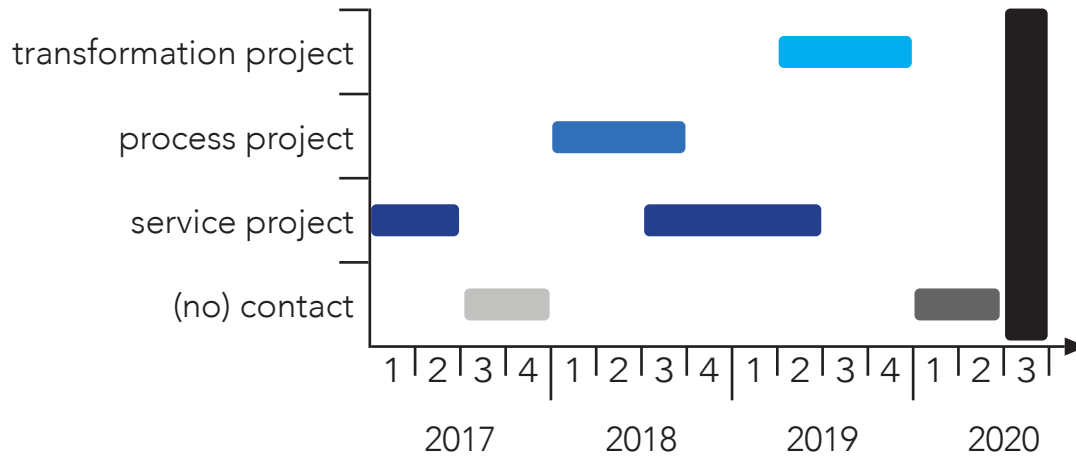
## Agency impact portfolio



The relationship impact portfolio graph 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 you have 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 pro-

cess and service level projects being 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 not working on a project with the client ensure you stay in contact with them. Thus avoid having to plot a dark grey square for any quarter. (the graph content does not represent an ideal situation)

## Relationship impact portfolio



# The impact level criteria

- 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

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Organizational service project ■

- 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

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## Organizational process project ■

- 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

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## Organizational transformation project ■

and now it's  
up to you!

# Appendix

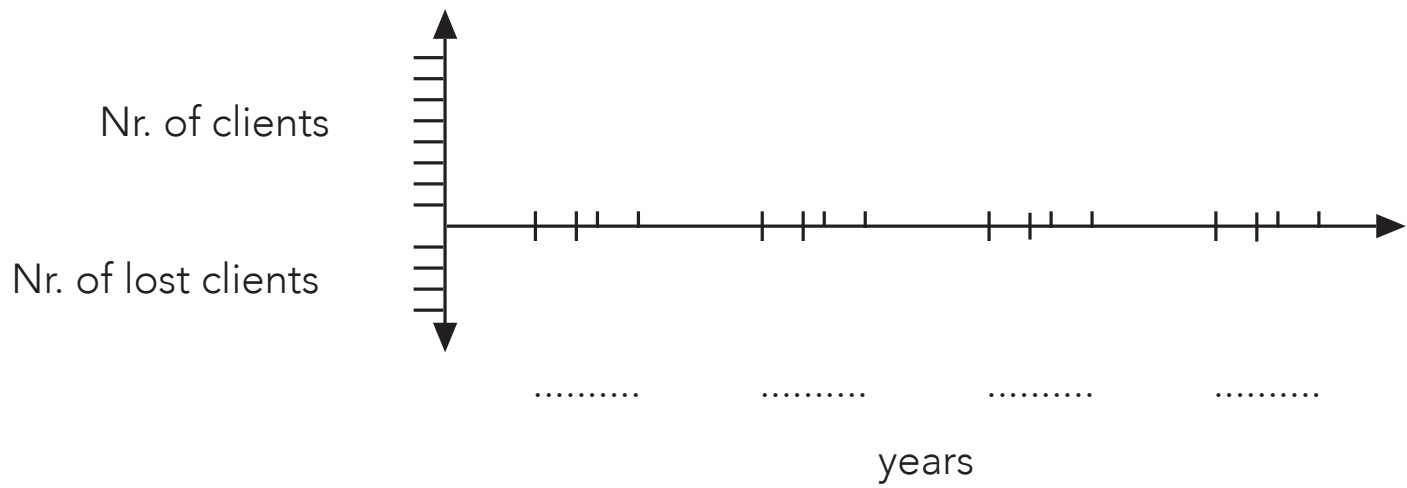
## The impact measurement graphs

The graphs can best be recreated in the program that you prefer so that it is easy to fill them in. However, would you like to use them in physical form (to hang on the wall or place at a desk) then here are the empty graphs to print out on a large format. Please fill in the agency impact portfolio graph at the end of each fiscal year and the relationship impact portfolio graph at the end of each quarter. The dotted lines in the titles are respectively for the agency's name and the client's name.

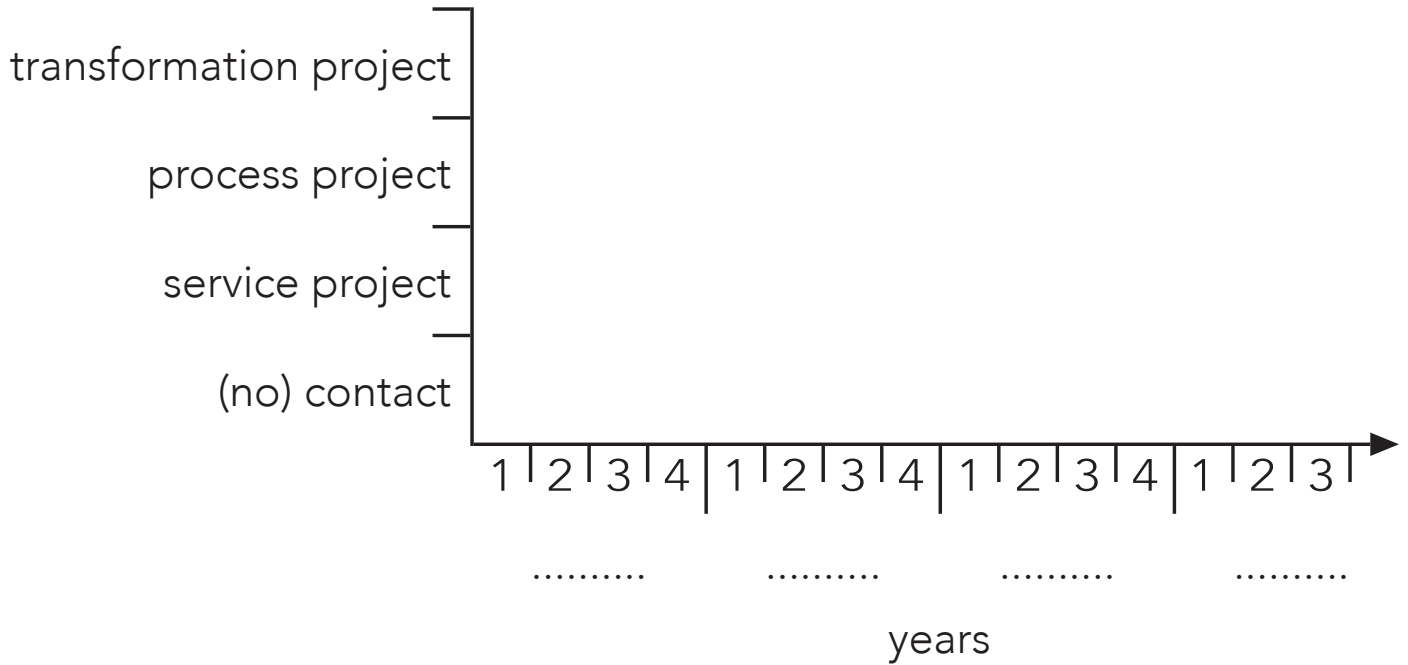
## The question cards

The questions that are part of the approach to client relations are placed here for you to cut out. Please print these double sided so you get the front and back of the cards. These can then be placed in this playbook or in a location which will frequently remind you to keep implementing the principles.

..... impact portfolio



..... impact portfolio





## Who is the client?

Focus on their personal incentives, knowledge and vocabulary alongside the company culture, goal and structure. Apply this to all people you get to know at the client company that have a say on the work.

## Where is this request coming from?

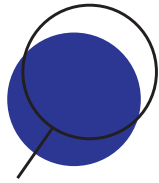
The answer to this question will shine a light on the reason why they are asking for help, thus where the true problem lies.

## What is the project objective?

The objective is an intended effect or impact and not a result. Make sure this is clear to all involved as you will need internal advocates.

## How are we going to work together?

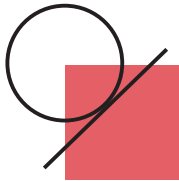
Achieve an understanding of the roles and responsibilities, while making clear that you will lead the project and close collaboration will be necessary.



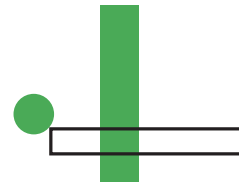
Project start



Project start



Project start



Project start



## Are there further opportunities?

This is always relevant and should be answered by outlining where and how to pursue them. Most important is to express the opportunities you see to the client.

## What do we have in common?

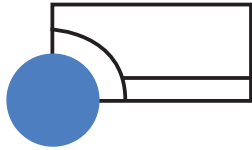
Make sure you know on a personal and business level what communalities you have with the client. This can range from hobbies to the vision for the client company.

## Do I understand the reasons behind client decisions?

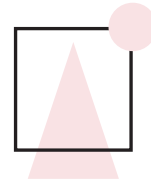
See if you can answer the why question when the client expresses that they do or do not want something. This also applies to their actions.

## Are we resolving the core pain point?

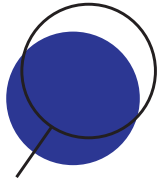
See if the client responds positively when comparing work done to the original situation. Ensure they understand the true issue themselves.



Project start



Project start



During project



During project



## Are we working towards achieving the objective?

See if your work logically informs what you intend to achieve in later stages. Ensure that both you and the client are aware of the progress being made.

## Are we closely collaborating?

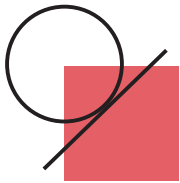
See if the client uses the term 'we' when talking about the work. Ensure they enjoy working together with you and are passionate about the project.

## Am I expressing the opportunities I notice?

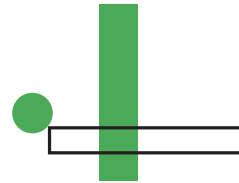
See if you are keeping the larger purpose of your agency in mind and thereby discussing those opportunities with the client.

## Are our visions aligned?

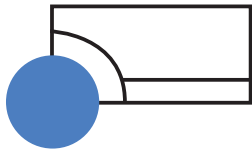
See if the client is an advocate for the common vision. Pay attention to signals that show disagreement with elements of it or the strategy and find a way to persuade them.



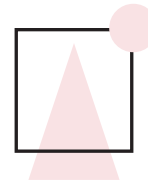
During project



During project



During project



During project



## Are we climbing the internal ladder?

Look to align yourself with people higher up in the client's organization who have more say over resource allocation and implementation of proposals.

## Do the stakeholders involved experience resolution of the problem?

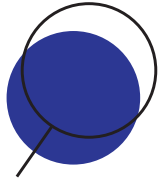
Always work on improving the extent to which they feel the pain, followed by the extent to which the work has resolved it.

## Is the intended effect being experienced?

This is discussed after projects with the client and/or shown by observing or testing with the target group.

## Am I still in regular contact with the client?

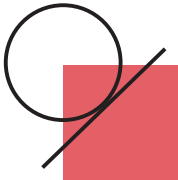
Invest your resources (to the extent feasible) in clients that you have worked with. This by helping out, sharing news or organising a social event.



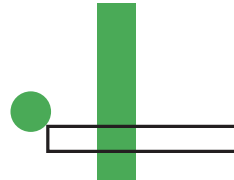
Project end



Project end



Project end



Project end

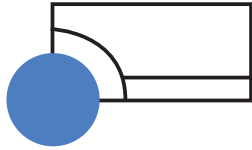


## Are further valuable opportunities perceived and pursued?

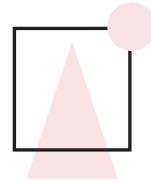
Ensure the client has enough understanding to see added value in opportunities proposed and the will to pursue them.

## Does the client see further necessity for change with us?

As there is a shared vision, the client should see you as the ideal partner to pursue it with. If not, make sure they understand the urgency and the value of your relationship.



Project end



Project end

“What is considered ‘realistic’ today should only be allowed to influence the pace of the transition, not its direction.”

