

## 10 Tips for Planning Your 2018 & 2019 New Business Activities

Written by Stephen Boehler & Lindsay O'Neil

A finely tuned new business plan requires preparation and planning. Here are ten tips for planning a better, more successful new business effort for your agency:



### 1. Distinctly Position your Agency

Some agencies try to be everything to everyone, or so their positioning would have us believe. As a service provider, that's an understandable position to take, but it dilutes your offering when a prospective client comes along with specific needs (which is, really, all of them). The ability of an agency to differentiate itself begins with a compelling agency positioning. You don't have to be so hyper-specialized as to become irrelevant for most AOR searches, but small tweaks in the way you talk about your agency can make a big difference in how you're perceived. A great historic example was Kaplan Thaler Group's "We make unknown brands famous. Make famous brands icons. And create ideas that become part of our culture." Start with a philosophy that's true to your work and style, and infuse that into everything else: work processes, interaction processes, and ultimately a positioning statement.

### 2. Focus on Business Issues

This one is so obvious, yet so often forgotten in the rush to talk up your agency. Business issues should be an undercurrent to, if not the outright focus of, any conversation with a prospective client. Even if the client's not willing to share all issues outright, there are ways to make the conversation more about them than you, and better yet, to show how you're the solution they need. The successful matchup

of client needs and agency offerings begins with an agency's ability to draw explicit connections between the two.

### 3. Highlight Service

The importance of outstanding service delivery can't be overlooked. We've conducted hundreds of client/agency 360 reviews, and our findings suggest that clients appreciate a high level of service above even table stakes like creative output or strategy. ("Service" appears as a key strength in 79% of our highest-performing reviews.) From the first lunch meeting to the pitch, agencies who can sincerely promote service delivery will stand out.

### 4. Make your Website Prospect Friendly

64% of agency seekers listed online research as their preferred way to find information on agencies, per a [2014 AMI report](#). This means that, if they don't quickly find what they're looking for, some prospects could discount you at first sight. I'm not suggesting you stuff your website with any and all potentially relevant information, but the basics should be accounted for: easy-to-use navigation, clearly outlined capabilities, some sense of scale, locations, accolades, clients, industry experience, bios, and, most critically, contact information. [This video](#) highlights the items we consider most important. (Failing all else, if I can email you to get the critical info, I'll forgive an obtuse website.)

### 5. Be "Reachable"

Too many times, as agency search consultants, we'll be looking to bring an agency into an RFI process only to be met with the greatest of new-business sins: the contact form. They appear on websites to net additions to the company newsletter, and that's great, but on the off chance someone is seeking to contact you about potential business in the here and now, it can act as a frustrating roadblock. At least give a phone number. Some of the biggest agencies out there provide direct contact info for company big-wigs on their websites, and, surprisingly, they respond when you email them! Smaller and mid-size firms should have no qualms about making themselves easy to reach.

### 6. Be Social

"Social" has been a buzz word for years now, so it's no longer the trendy way to communicate your agency brand – it's increasingly the most direct. It goes without saying that a strategic approach to social is best, but often agencies don't have the time to do for themselves what they excel at doing for their clients. At any rate, you need to be present and active. A blog or Twitter feed that ends at 2013 is worse than no feed at all. As a starter, develop a basic calendar, and in terms of content, focus on

servicing needs and not solely on touting agency merits. People love free content, and providing useful information will establish you as a thought leader in your space.

## 7. Meet & Greet

This one, you already know, but it would feel wrong to make a list and not include it. Personal relationships still serve as the heart of new business activity, and often just keeping your name on potential prospects' brains is enough to secure consideration the next time an opportunity arises. A follow-up checklist [like this](#) should be sitting on your desk. And keep the newsletters, personalized outreach, and lunch meetings coming; it'll pay off somewhere down the line.

## 8. Solidify your New Business Process

If you're in the pitch room, you likely know how to sell your agency well enough, but how much of your success is due to gut feel versus an established process? Whether you're responding to an RFI or RFP, or presenting in front of the client, an agreed-upon process (and checking the right boxes on what answers a client is really looking for) can lead to a higher success rate in winning new business.

## 9. Talk to a Third Party

Agencies excel at helping their clients with their marketing, yet often struggle to market themselves. That's not surprising. What is surprising is how many of them continue to struggle at doing it on their own, often in fits and starts or with a complete makeover every few years as the need for a change arises. Take all the worries about time, staff energy, and potential process headaches off your shoulders and let a third party handle them, giving you the space to do what you do best and come up with excellent marketing solutions.

## 10. Perfect your Pitch

Most agencies start their presentation by calling for interaction, and then proceed to talk for 75 minutes with no interruption. Granted, some clients are content to sit back and take it all in, but the best presentations really do foster some level of questioning, idea sharing, and adjustments to feedback on the fly. Suggestions to open up the room include: regular check ins, direct questions to the client (ideally more specific than, "Do you have any questions so far?"), and acknowledging how previous client feedback has influenced your thinking. Obviously, forcing interaction can backfire, so maybe hold off on the team-building exercises.

## Conclusion

A successful new business plan requires that you create and work the plan! These ten tips will help you deliver more new business success in the next 12 months:

1. Distinctly position your agency – you need to in order to stand out
2. Focus on business issues – no one wants to buy services; all have problems to solve
3. Highlight service – service creates long term value
4. Make your website prospect friendly – highlight the right information in an easy to navigate manner
5. Be “reachable” – make yourself easy to be found; most agencies have low awareness
6. Be social – social media can help you reach new audiences and remind old friends of your expertise
7. Meet & greet – never eat alone!
8. Solidify your new business process – develop a process that works and leverage that process
9. Talk to a third party - call us!
10. Perfect your pitch – make the pitch about the prospect’s business, not your agency