Modeling Engagement

Designing conversations and managing complexity

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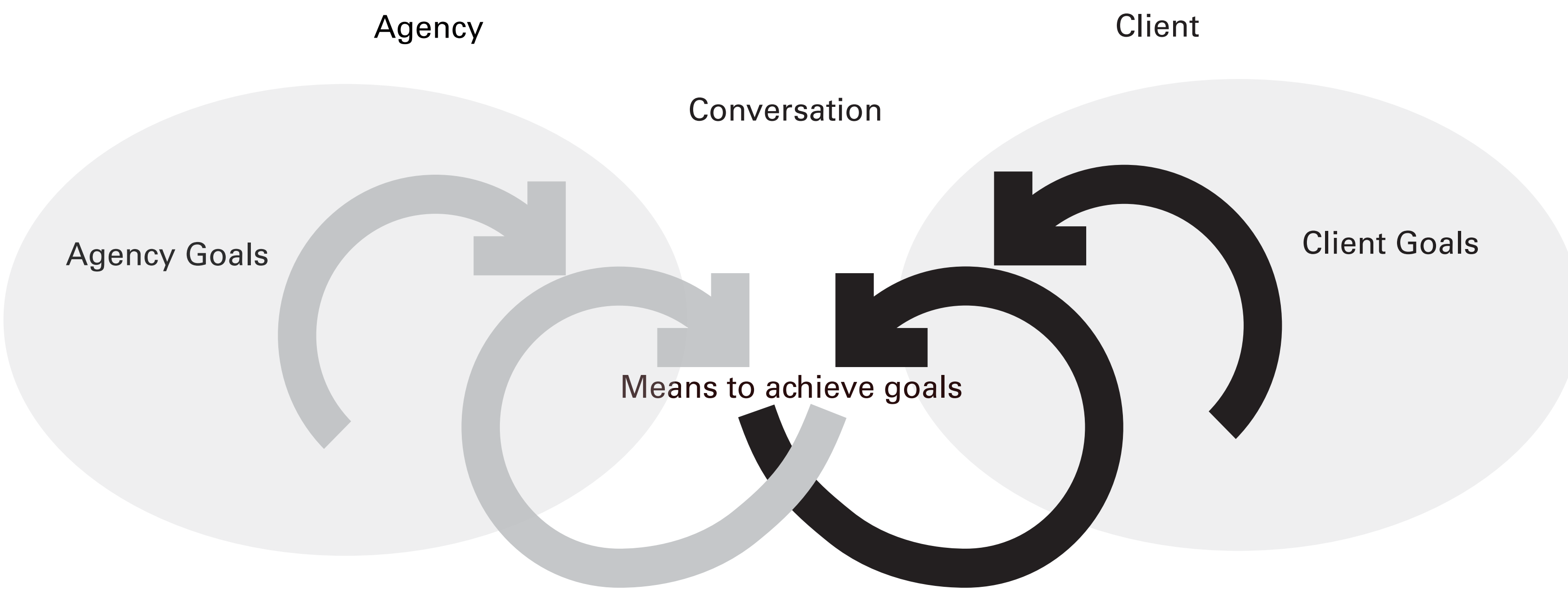
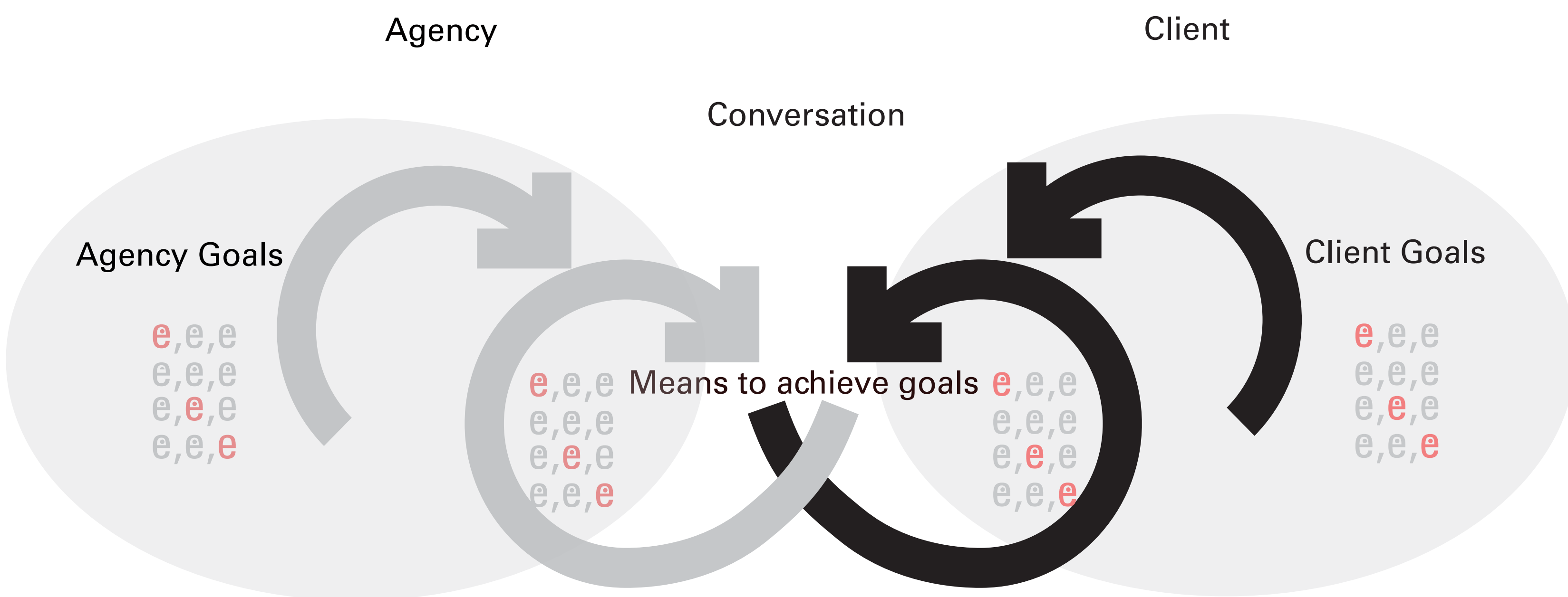
Engagement is a conversation between agency and client.

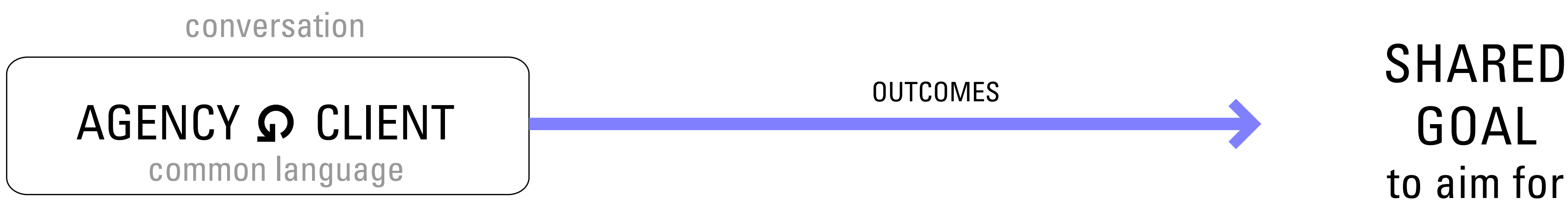


The effectiveness and efficiency of the engagement depends on the “quality” of the conversation. Quality depends on who participates in the conversation —between agency and client, or internally to one or the other—and how clear the goals are.

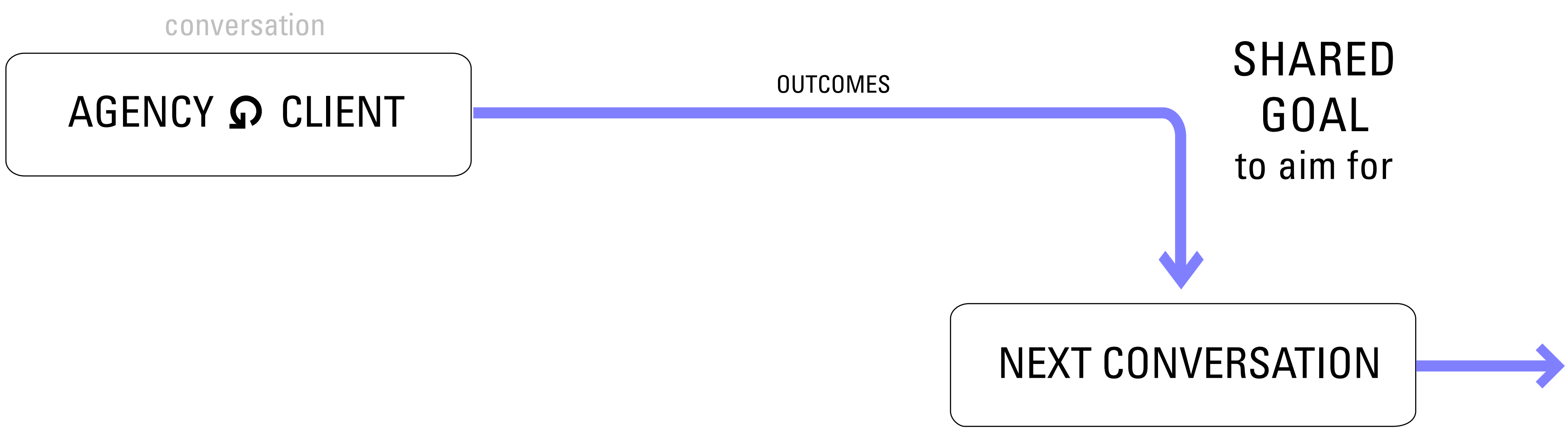


Not everyone can—or should—be in every conversation. So, being deliberate about understanding and designing the conversations of engagement has both creative and business benefits.

Productive conversation requires commitment to find common language and shared goals. The most useful outcomes—for agency and client—are realized under these conditions.

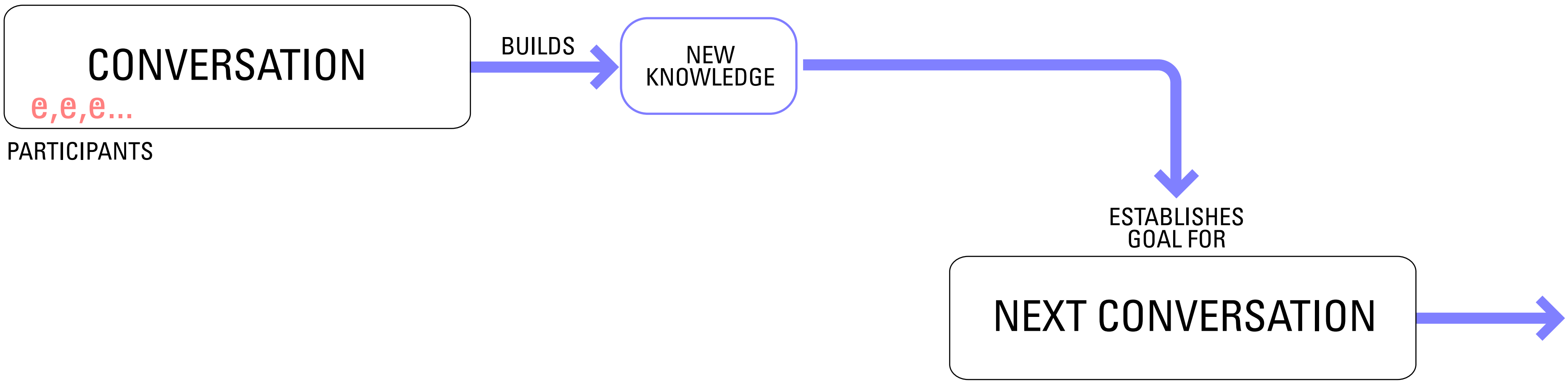


Client engagement is a series of outcome-oriented conversations.
So, if we model these conversations and design them, we can make them more successful.



A Model of Successful Conversations

In successful client-agency conversations, participants build new knowledge and agree on goals for the next conversation.



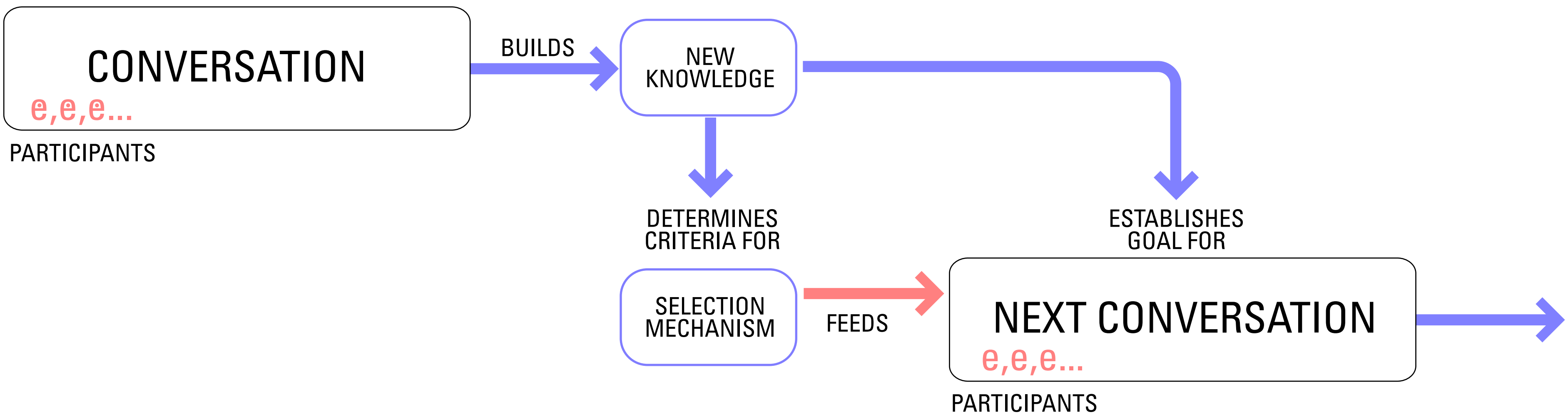
The outcome of successful conversation is new knowledge. (Otherwise, what was the point?)

New knowledge is experienced as progress in defining / refining / converging on goals and outcomes. These may be shared via further conversation or tangible artifacts that capture insights and ideas, goals, plans, metrics, schedules, measures, or evaluations. In addition to adding perspectives and evoking questions, new knowledge establishes a goal for the next conversation in the client engagement flow.

The next conversation can have more refined goals and may be more productive.

How are participants selected for the next conversation?

The nature of the new knowledge and goals determine the criteria for selecting participants and information for the next conversation.



To be effective, the selection mechanism for participants in the next conversation must be based on criteria derived directly from the new knowledge—the new perspectives and questions, as well as the goals—that come from the prior conversation.

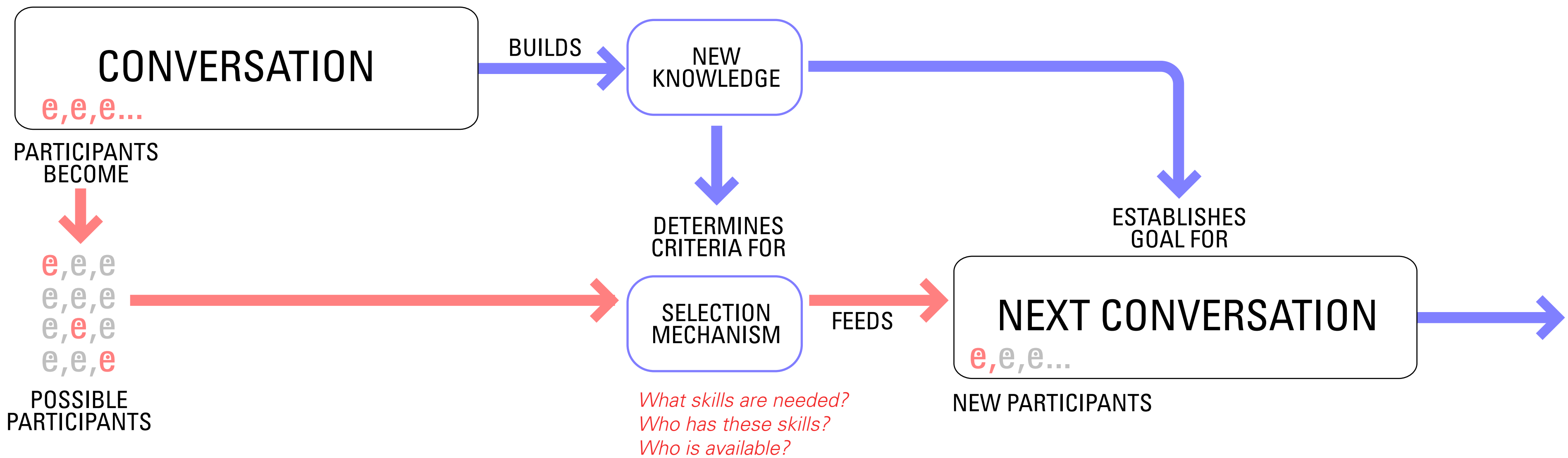
Similarly, the selection mechanism for information to bring to the next conversation must be based on the new knowledge and goals of the prior conversation.

While restricting participants and information to those necessary brings effectiveness, avoiding unnecessary participants and information will improve efficiency.

The selection mechanism can be informal or highly rigorous, as suits the goals and the level of risk in not achieving them.

In all cases, the purpose of the selection mechanism is to achieve “requisite variety” in the next conversation—for the participants to have the range of experience and expertise (the ”variety”) that is required to achieve the goals of the conversation.

Participants in the current conversation are often in the best position to select participants for the next conversation.



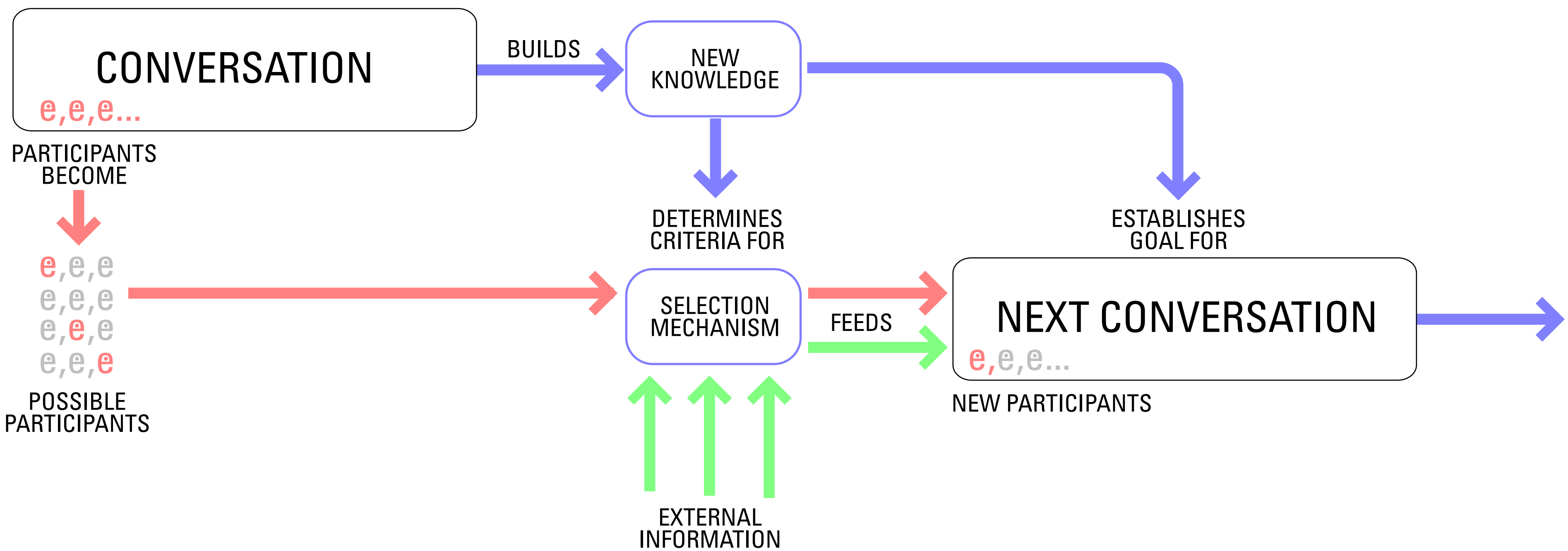
Participants already involved may be appropriate to continue, and have the advantage that they know the history.

New participants may be selected from a larger repertoire of possible participants. In total, participants should have necessary expertise and experience to achieve the goals of the next conversation.

As new participants are added, they may, in turn, have suggestions for other new participants.

The selection mechanism avoids “too many people in the room” by including only those sufficient to achieve goals, bringing efficiency.

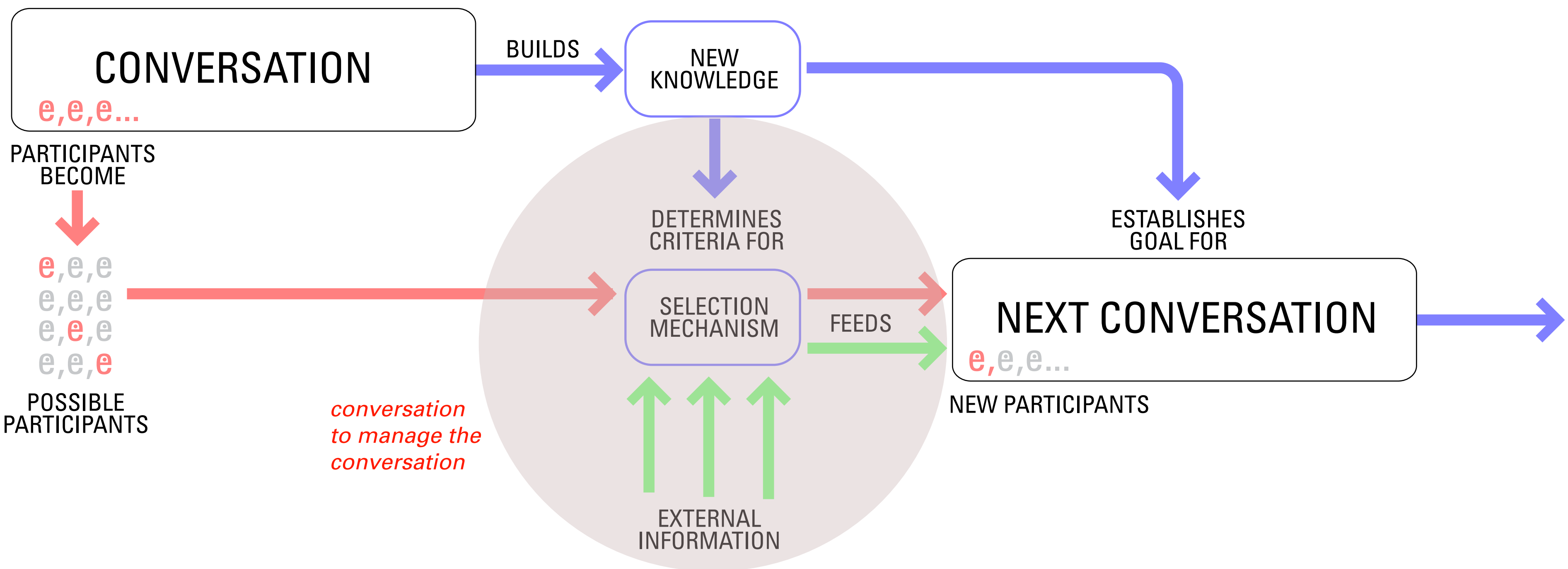
Selecting participants is part of a larger planning function that enables the right external information to enter the next conversation.



Just as new knowledge and goals determine criteria for selecting participants for the next conversation, they determine criteria for selecting information that must be brought in.

And, just as participants feed the next conversation by adding needed variety, information feeds it by adding variety in the form of qualitative and quantitative statements and context that are considered necessary to achieve the goals of the next conversation.

So, as we have conversations to build new knowledge and to establish goals, we have conversations about the participants and the information required to reach those goals.

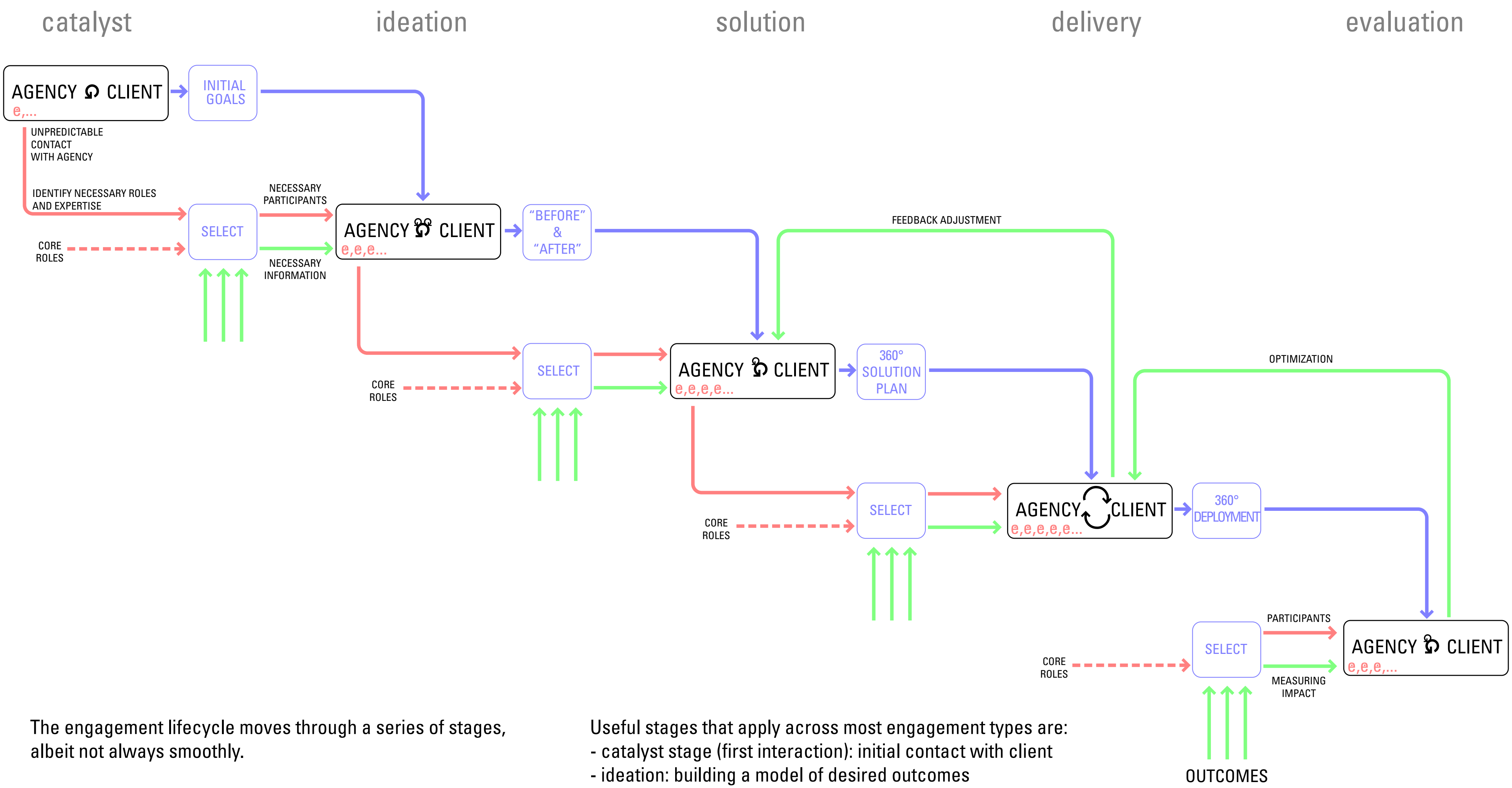


Resources are best focused on doing, not managing the process. However, attention paid to managing the conversation can more than pay for itself.

Skill in managing conversation is different than skill in doing the work. Both are required for productive conversations and successful engagements.

A Model of Client Engagement

Client Engagement can be modeled as a series of stages—catalyst, ideation, solution, delivery, and evaluation—each with specific goals, and therefore specific requirements for participants and information to feed the next conversation.

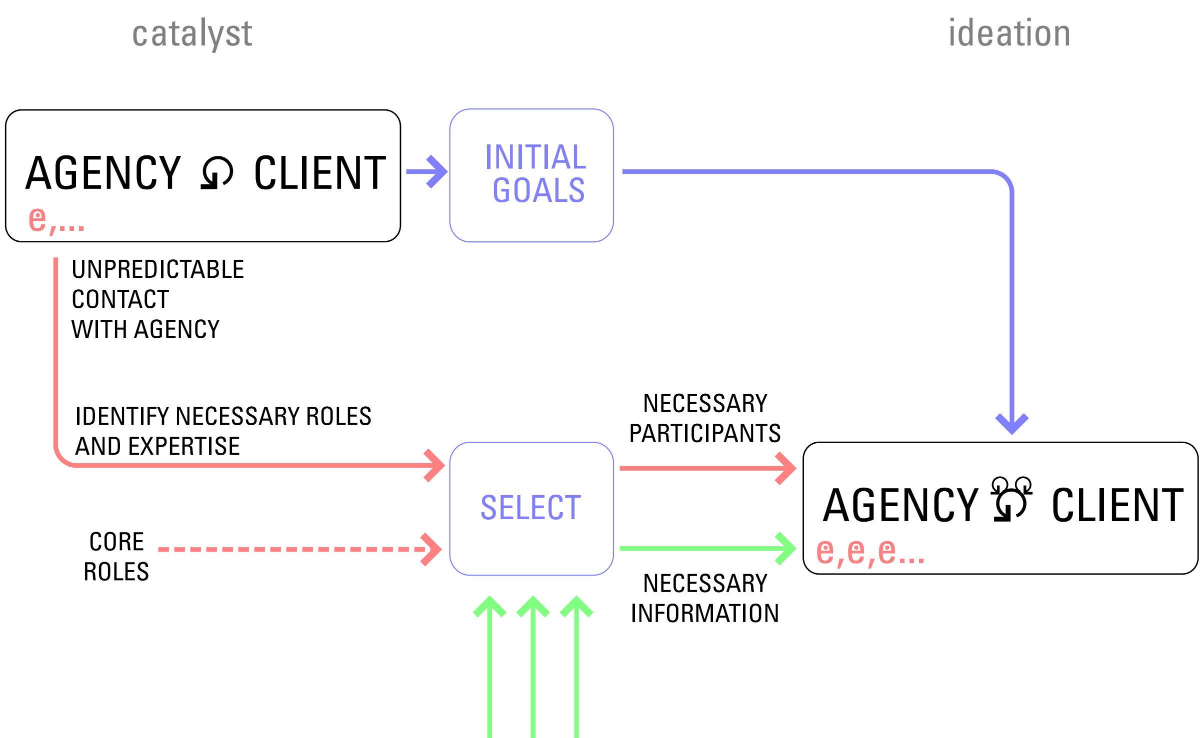


The engagement lifecycle moves through a series of stages, albeit not always smoothly.

Core roles—often the "triumvirate" of account, planning, and creative, but increasingly specialized to a given 360° engagement—are responsible for driving to results, and for communicating across stages and across agency and client groups.

Useful stages that apply across most engagement types are:
- catalyst stage (first interaction): initial contact with client
- ideation: building a model of desired outcomes
- solution: creating a plan to achieve the outcomes
- delivery: executing the plan, deploying the solution
- evaluation: measuring against goals, then adjusting.

In the "catalyst" stage, conversation leads to initial goals for the engagement. These goals define the necessary participants and information for the next conversation, i.e., the "ideation" stage.



Every new engagement begins from an initial contact: client and agency have some exchange. This can't be predicted and so who from the agency is engaged can't be planned. In the exchange the agency learns of some catalyst, some reason why the client has made contact, and may learn little more in this first, usually brief, encounter. A set of questions defines selection criteria for participants and information for the "ideation" conversation:

What was catalyst for the contact? What was said? What is bothering the client?

What is the business and market context?

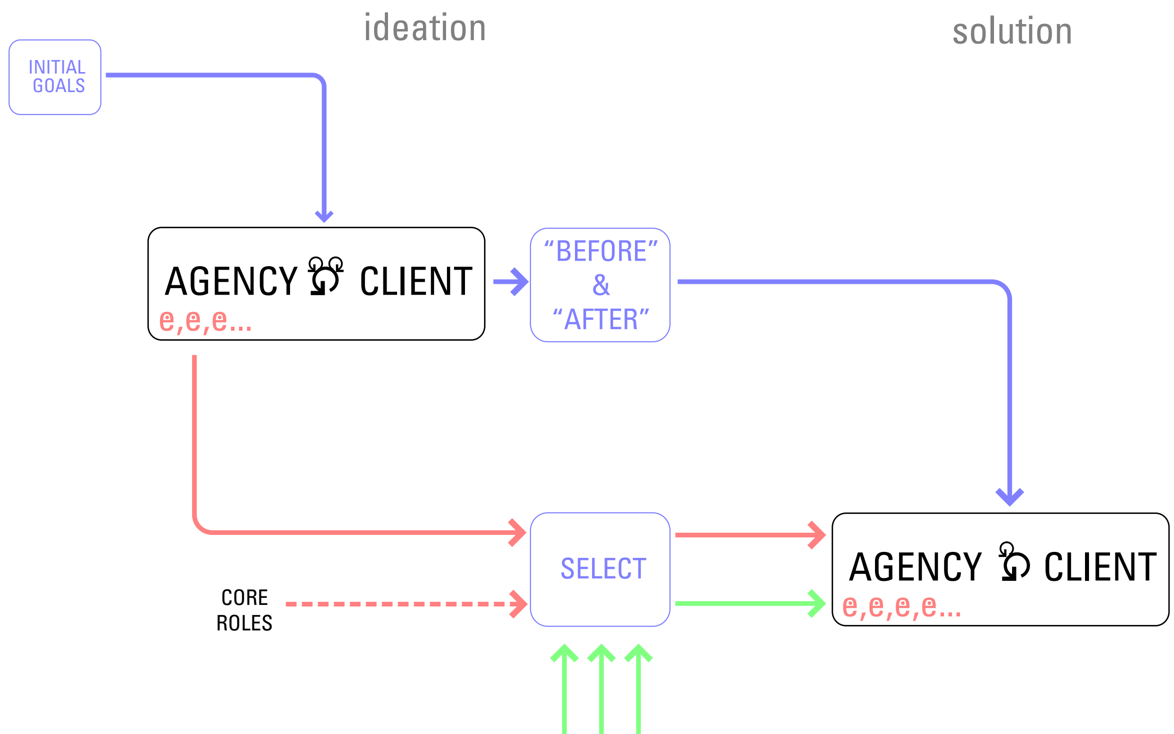
Who are key players for client and agency?

What is the client culture and brand about?

What are client's goals? Does the client know them?

Given the above, what roles, filled by what individuals, are appropriate for the ideation stage?

In the "ideation" stage, participants create a "BEFORE" and "AFTER"—descriptions of a current state and a desired state to be achieved. The "AFTER" description is the goal for the overall engagement and is passed along to the "solution" stage.



Client and agency meet in depth to consider client business, market, and brand. Conversation to create descriptions of "BEFORE" and "AFTER" incorporates the challenges and opportunities in the market context on the path of devising a strategic hypothesis of how to reach desired goals. So:

What is the nature of the competition? What is the market opportunity? What opportunities exist for our client?

What problem(s) do(es) our client really have?

How do participants from agency align with key client players ("casting")?

What does agency want from the engagement?

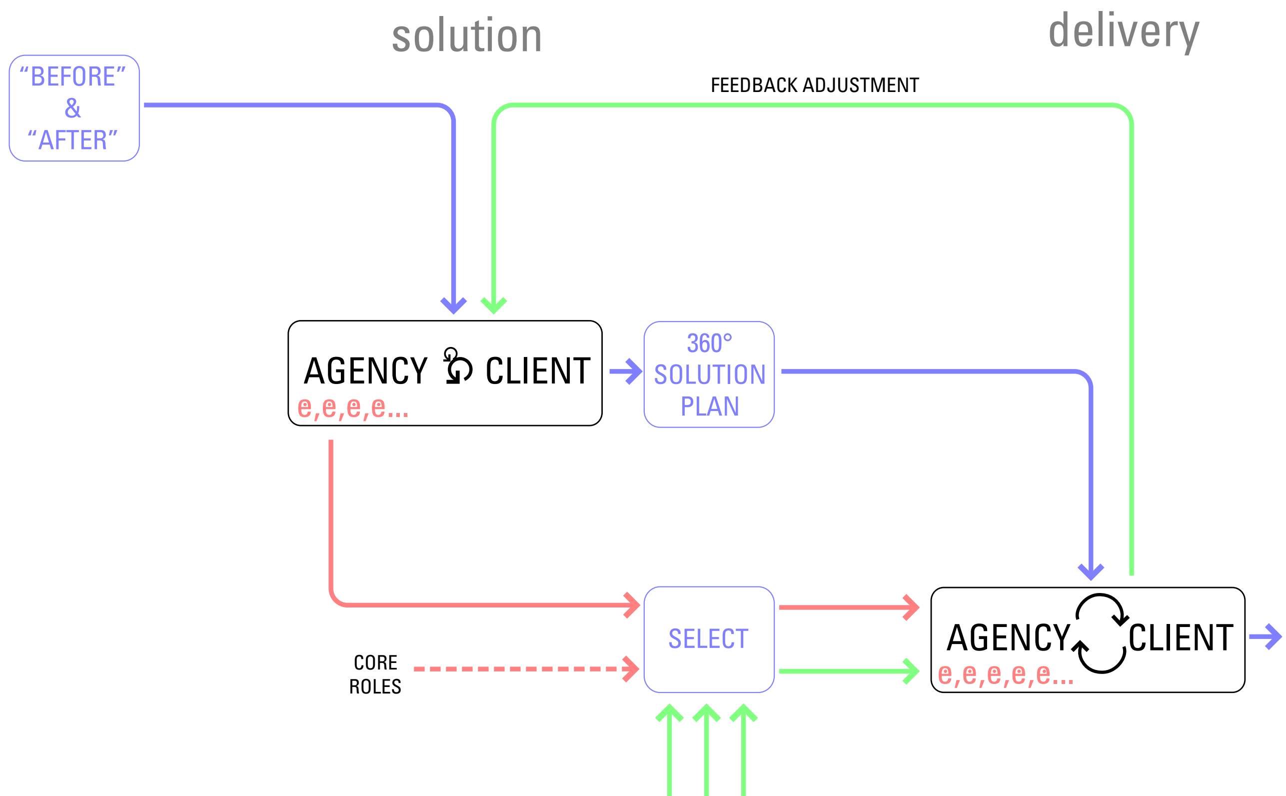
Who leads the engagement from here?.

What are desired goals and outcomes? How will we know when we are successful, in our terms and in our client's terms?

What constitutes a mutually beneficial engagement? What might be the terms and conditions of our agreement?

Given the above, what roles, filled by what individuals, are appropriate for the solution stage?

The outcome of the “solution” stage is a 360° plan which is designed to achieve the desired “AFTER” state. The plan is passed to the “delivery” stage for execution.



Conversation in the “solution” stage determines what media, production, deployment, tracking, optimization, and evaluation is required to achieve goals. Questions to answer:

What do we know? What do we need to learn? What trends should we pay attention to?

How are we re-framing the client’s problems and opportunities?

What is the distinctive position/differentiation in the market that only the brand can occupy? What is the brand promise? Can the client deliver on the promise?

Who are existing and potential customers? What are their needs and desires? What is the customer journey?

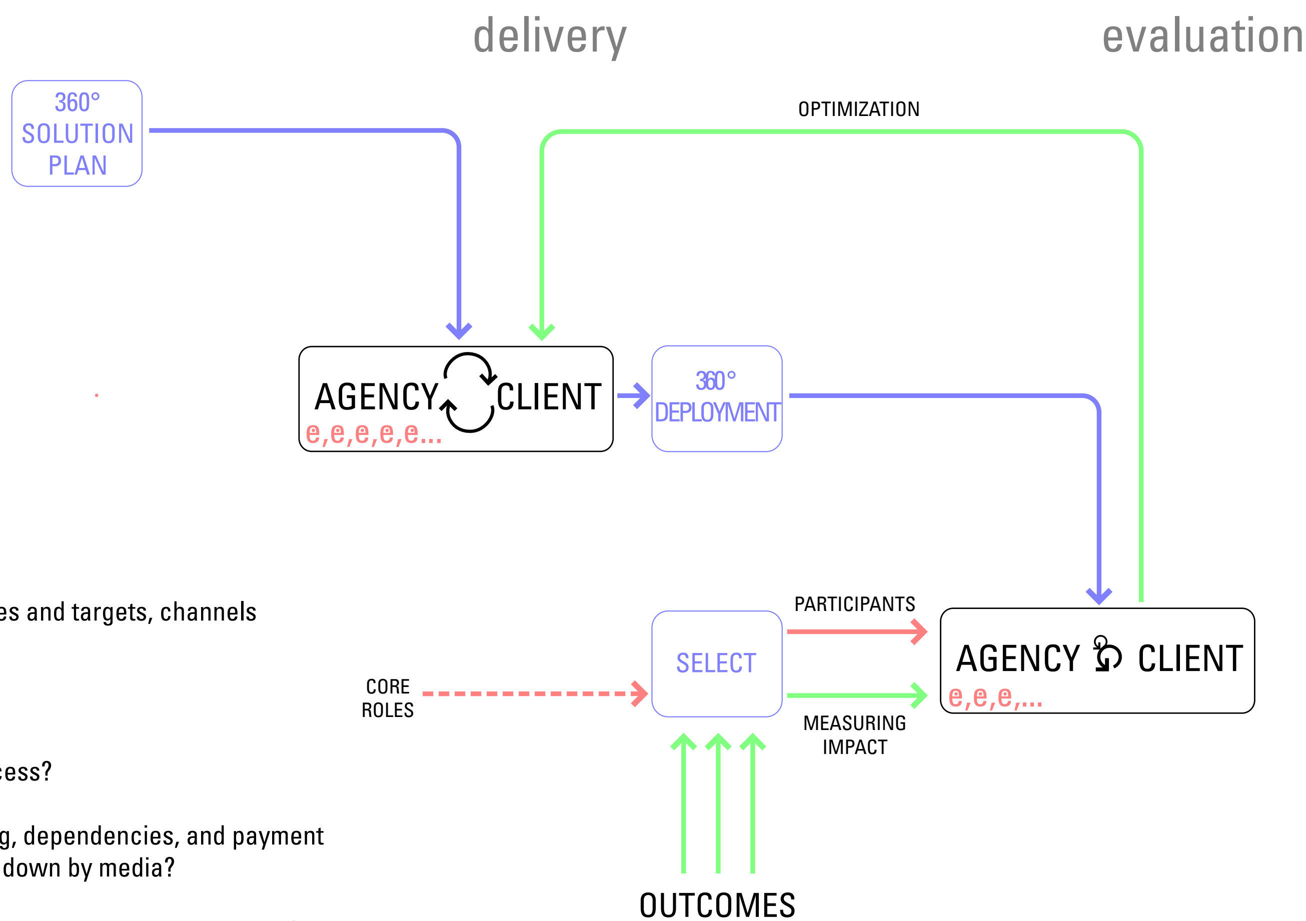
What insights can we glean? What is the Big Idea? Are we expanding the conversation around the brand? How will it achieve an expanded conversation? Are the messages resonant enough—is it a natural communication? Will it have an arc to reach a large new population?

What is the Brief?

Given the above, what roles, filled by what individuals, are appropriate for the delivery stage?

Some adjustments to the plan will be made during delivery, while the need for larger-scale change is discerned during evaluation.

The agency and client execute “delivery”. The outcome is a 360° deployment, which is evaluated against goals in the “evaluation” stage.



Questions to answer:

What is the media plan? priorities and targets, channels and technologies, metrics

What is the production plan?

What is the client approval process?

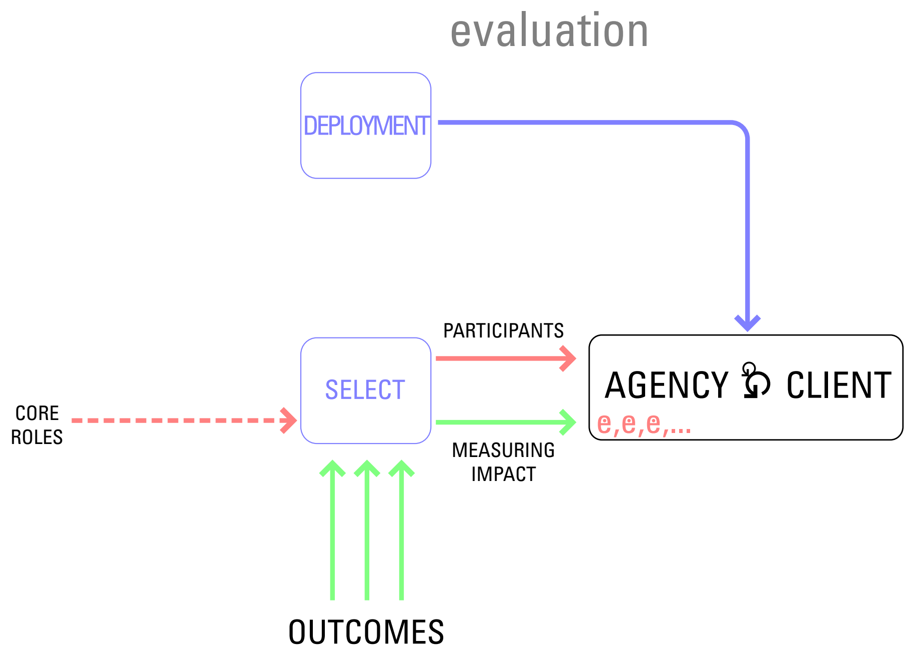
What are projected costs, timing, dependencies, and payment schedule? How does this break down by media?

What does the agency do? What does the client’s team do? Where are the handoffs?

How do we test and track?

Based on feedback of outcomes against goals, how do we optimize channels?

Overall outcomes from the engagement are measured during the "evaluation" stage. Appropriate participants from prior stages and the core roles gather to decide on short-term and long-term improvements.



After deployment, evaluation occurs on multiple timescales. It requires a particularly broad range of individuals who must be able to recognize errors.

Short-term: Immediate impact on the audience is measured and adjustments may be made to optimize channels. If goals are not met, modifications to the solution plan and re-deployment may be appropriate. Questions:

Measured against goals, how effective is the campaign?

What's working well and what isn't? What changes can be made to improve outcomes?

Engagement-wide Evaluation: Overall evaluation of the entire engagement is also important, measured against goals for audience impact as well as quality of the client relationship. Questions:

How did we do against goals—client and agency? Did we achieve our qualitative and quantitative goals?

How did we work together (process)? What do we want to change/improve?

What are the next steps? Goals?

What did we learn from this engagement about the market/environment? About ourselves? Our client?

Conversations inside of conversations

Engagement conversations take place between agency and client, to agree on goals and the means to achieve them, and to do the work.

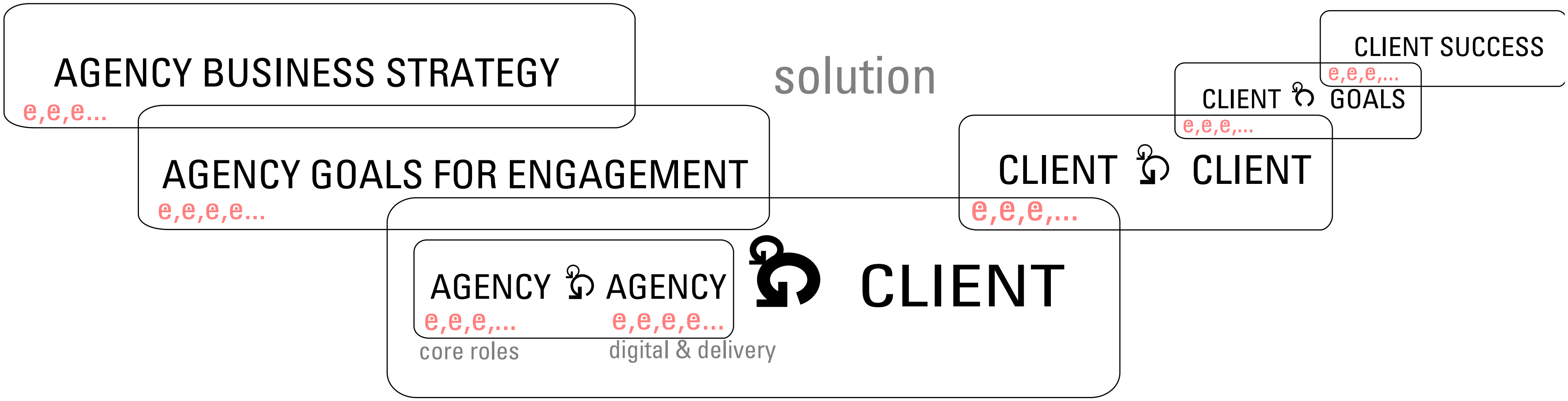
At the same time, agency and client each hold important conversations internally.

Even while engaged in conversation with the client at every stage, the agency is conversing internally. For example, in the solution stage, core roles engage participants who cover digital and delivery to maintain goals and quality.

Just as the client/agency conversation needs to be designed, so do conversations internal to the agency.

The core roles have overall responsibility for the engagement, including these internal conversations. These require vigilance as to goals, communication, client liaison, resource allocation, budget, and schedules.

Engagement conversations are nested inside of other conversations. For example, as the agency collaborates with the client to create a 360° solution, its decisions are guided by its goals for this engagement, as well as its overall business strategy. The client has parallel, and possibly incompatible, goals.



For the engagement to be effective for the agency, its internal conversations to do the work should be compatible with its goals for this specific engagement. These goals, in turn, are developed inside management's conversation about the mission of the agency. If working as desired, all levels of conversation are compatible.

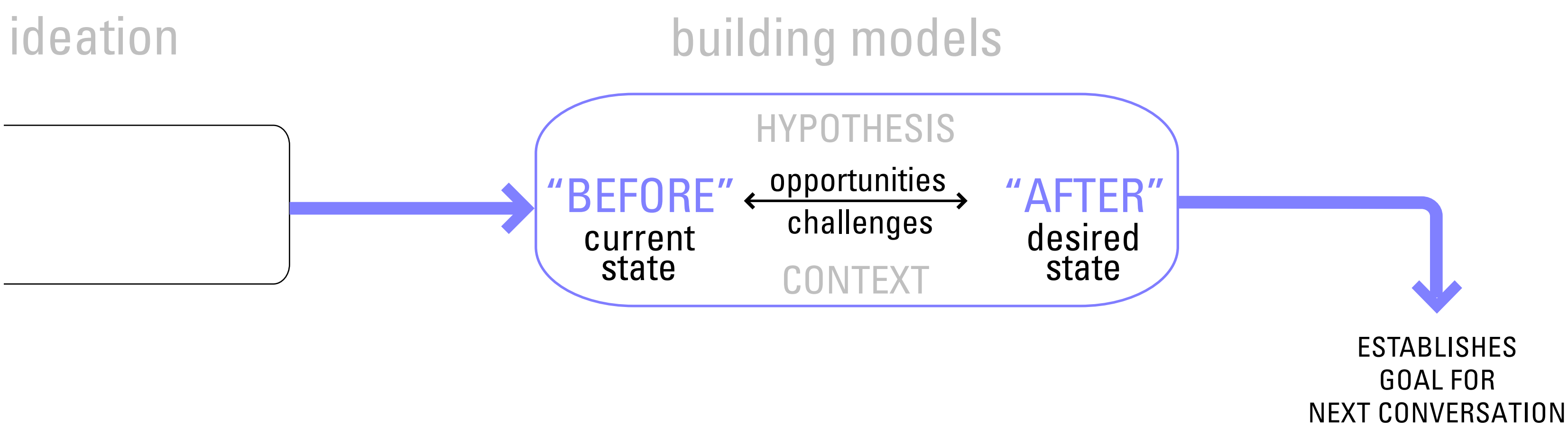
The importance of "having the right people in the room" has two senses: right for making the client successful and right for achieving the agency's business strategy.

For an engagement to be successful for the client, its goals for the engagement must be compatible with its own measures of success.

To the extent that goals of client and agency are incompatible, either during collaboration or internal conversations, inefficiencies will accrue.

Sometimes it is the agency's job to point out when a client's internal conversations are inconsistent.

Lastly, every conversation can be viewed internally as a series of exchanges between evolving models of knowledge "BEFORE" and "AFTER" the conversation. Comparisons across these models are a stimulus for creating new knowledge, which generates its own energy that can be poured back into the conversation.



The internal structure of a conversation is analogous to that of the "ideation" stage of engagement:

In the course of conversation across the perspectives of "BEFORE" and "AFTER", prior knowledge may be formulated into a useful model of the current state.

At the same time, new knowledge evolves. New knowledge may become a hypothesis about a state that is more desireable than the current state.

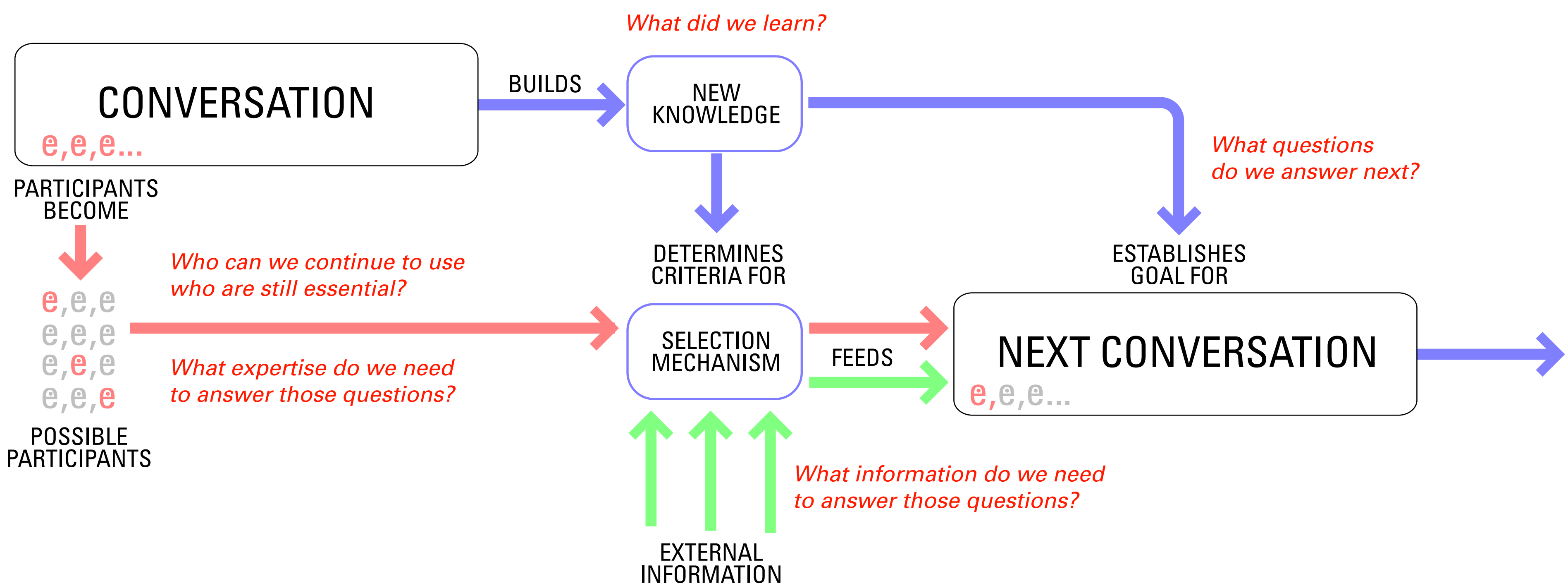
In this case, the "AFTER" state becomes the goal of the next conversation. Along the way, the creation of new knowledge is a source of new energy in the conversation.

Designing Engagement Conversations

How do we simplify client engagement and work together effectively and efficiently?

Here are 3 approaches.

1. Bottom-up approach: Keep asking the important questions that ensure the right participants and the right information in every conversation.



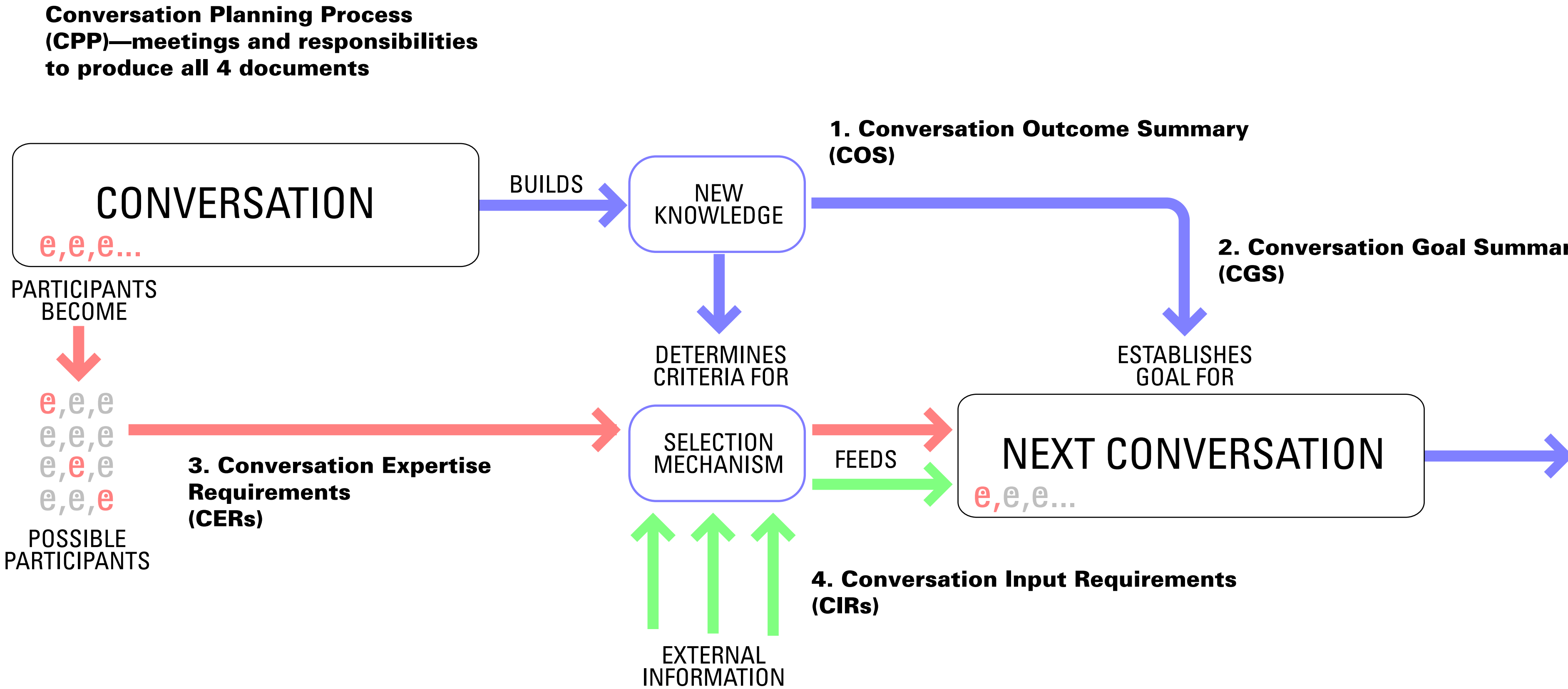
Given the conversation we've just had, focus on the questions above to make the next conversation successful.

In short, given where we want to go:

Who are the necessary and sufficient participants?

What is the necessary and sufficient information?

2. Top-down approach: Impose a formal process.

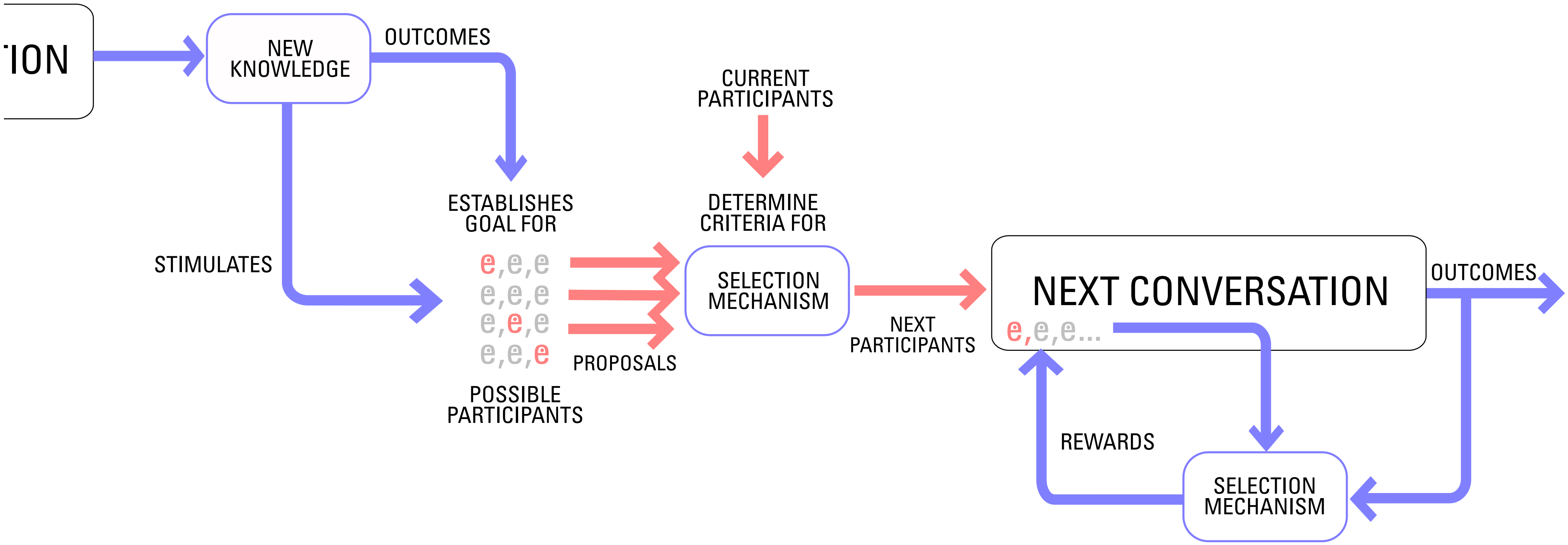


Formalizing the management of engagement conversations is common practice where complexity would otherwise jeopardize quality and delivery, as in software development.

Some aspects of client-agency engagement already have formal products, such as conference reports, briefs, integrated marketing plans, delivery schedules, and so on.

While we are not proposing to formalize client engagement to this extent—this proposal is unsupportable and is a red herring—but there is a lesson for maintaining goals and quality. No matter how informal the process, the core roles are responsible for determining an appropriate degree of formality—and for imposing it, including on their own resposibilities for communication and selection. At a minimum, this comprises examining current practice and paying attention to designing the conversation at each

3. Radical approach: Attract participation with new incentives.



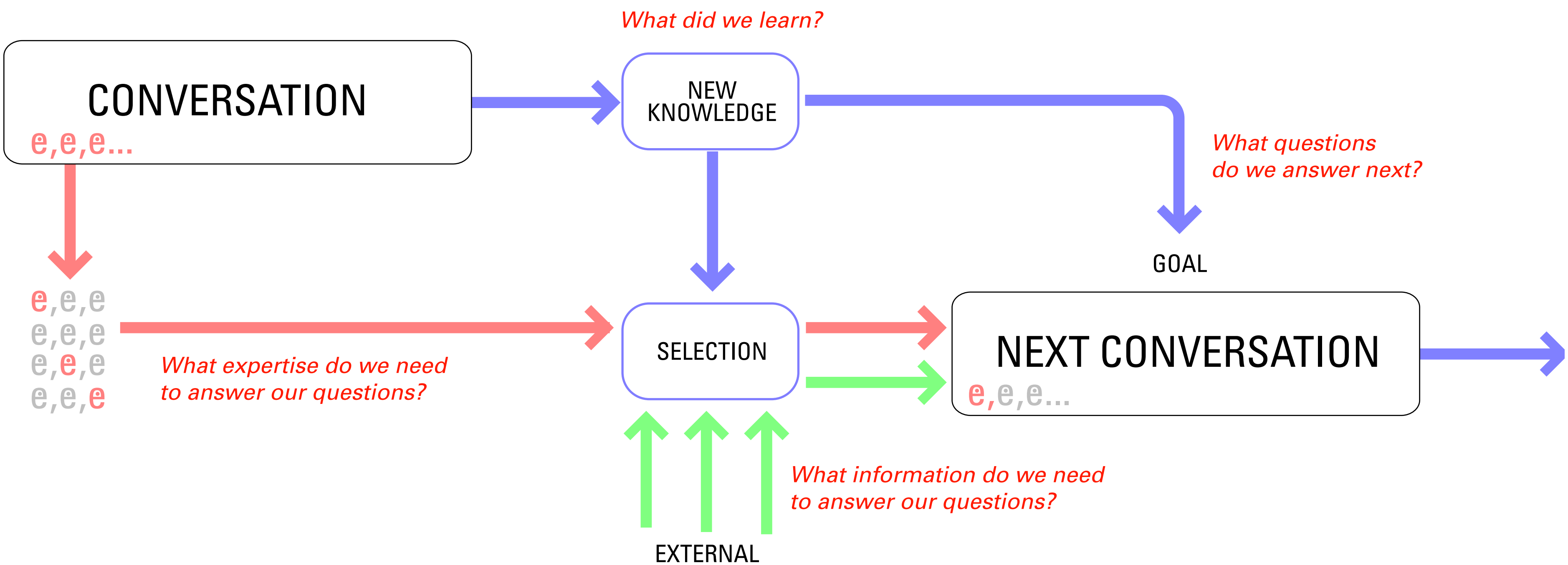
Allowing current participants, including the core roles, to choose participants and information for the next conversation will likely lead to success—but less often will it lead to innovation. Current participants have limited variety. And their viewpoint may be constrained by their pre-existing model of the "problem".

What if the core roles made the outcomes of engagement conversations—new knowledge and goals—available via the intranet? Individuals inside the agency could review these and propose their own participation, bringing their skillsets and ideas. Current participants, including but not limited to the core roles, would judge and choose the most promising proposals.

The process would open up possibilities to the broadest variety of agency expertise and likely produce unexpected, innovative solutions.

After any engagement, recognition ought to be given by the core roles to participants who contribute to successful outcomes. But there is a more powerful incentive when the participants are given a small bonus pool to distribute among themselves, based on their judgment of "success" for client both and for agency. In addition to providing genuine incentive to propose their own participation, those who are most rewarded are identified as most valuable. This is a reliable predictor of expertise and behaviors that will make the agency successful in the future.

Designing Engagement



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