

## 4. RELATIONSHIPS: NOT TAUGHT IN PR SCHOOL

**W**hile this manual discusses several specific areas of a public relations practice, it largely assumes a high level of professionalism and public relations expertise among its readers. The other key for a successful agency is its ability to build relationships that grow and endure, even in those instances where the professional work may be less than perfect. That's a skill not covered in college PR textbooks, although some books on management and marketing contain excellent chapters on the concept of "relationship management."

The following list of commandments advances the cause of long relationships with some practical approaches. Assume "Thou Shalt" in front of each of these 12 commandments:

### 1. DETERMINE RESULTS IN ADVANCE

The surest way of helping the client recognize the agency's value and track its progress is to reach clear agreement in advance as to how the program will be measured. A number of methods exist for measuring results (See Chapter 7 on "Establishing the Results Ethic"). Mutually defining them — whether it be by gross impression, calls to an 800 number, traffic to a Web site, clip count or formal survey — is essential.

Included in this process is obtaining a clear delineation of what the client needs to have happen, a process that can serve to set priorities, generate team thinking on critical issues and gain mutual consent for moving forward with specific directions.

### 2. ESTABLISH CONSISTENT CONTACT

Formal and informal contact cements relationships. Members of the team should remain easily accessible, with the client never left without an in-agency contact at any time. In many cases, sharing home and cell phone numbers creates a sense of service and trust, even if the numbers are never used.

In addition to specific forms of contact indicated later in this manual, help the client develop a contact ethic by:

- Asking to be included in critical marketing meetings and appropriate strategy sessions
- Being added to the e-mail distribution list for appropriate internal memos and correspondence

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- Receiving copies of clippings when the client is on the receiving end from the service
  - Establishing lines of communication throughout the company
  - Clearly indicating approval processes and appropriate internal distribution

Care must be taken with protocols and procedures for contacting different people within the organization. In some cases, agencies work directly with the chairman, president and CEO. With larger organizations, the designated contact can be a vice president of corporate communications or marketing. Be clear on reporting expectations so your primary contact doesn't get the sense that the agency might be overstepping the boundaries of the relationship.

### 3. INVEST IN THE LEARNING CURVE

Tapping sources of basic research when seeking the business and pursuing it more aggressively early in a relationship establishes a pattern of nurturing concern. The chapter on research provides more detail. At the least, start by requesting internal documents, business plans, organizational charts, product specifications, annual reports, marketing plans and other existing materials from which you can absorb company and industry knowledge.

While some amount of learning can properly be billed to a client, going a measure beyond the expected can pay dividends as the client realizes your willingness and interest. One of the most successful methods of gaining information and building relationships at the same time is through an internal audit. A typical audit involves confidential, individual interviews with five to ten company executives, board members and, in some cases, their investors. Agency team members divide up the interviews and start by asking for a global perception of the industry they serve, then move into the company, its culture, its mission and how individuals are organized to achieve their goals.

## CLIENT SERVICE HIT PARADE: THE TOP AND BOTTOM 10

### *What Clients Like ... Versus What They Hate*

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|--|---|
| 1. Integrity                                 | 1. Bait and switch; disappearing senior management after sale |
| 2. Proactive client service, enthusiasm      | 2. Over-promising   |
| 3. Professionalism, experience               | 3. Few results, many excuses                                  |
| 4. Knowledge of company, industry            | 4. Lack of knowledge of company, industry, competition        |
| 5. Strategic thinking                        | 5. Order-taking versus consulting                             |
| 6. Creativity                                | 6. Boilerplate client service                                 |
| 7. Accessibility, responsiveness             | 7. Lack of communication, responsiveness                      |
| 8. Budgetary responsibility                  | 8. Exceeding the budget; low perceived value                  |
| 9. Bottom-line orientation ( <i>theirs</i> ) | 9. General business ignorance                                 |
| 10. Loyalty                                  | 10. Chasing the client with the biggest budget                |

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#### 4. STAY AVAILABLE

Few client situations seem to set off fireworks more quickly than an unanswered phone call or e-mail. Alternately, clients are impressed with consistent availability and short response time.

Agency policy can give the staff a few valuable guidelines:

- Return client calls or e-mail as soon as received; always the same day unless there are extenuating circumstances.
- Make sure there's a chain of contact so that the client can **always** speak to a team member within a very short period of time.
- Always alert clients to pending team member absences and give them back up contact plans.
- Get back to clients even if you don't have the answer to their question (to let them know you're working on it).

The same approach applies to action steps assigned during the course of normal account work. While clients sometimes have an unrealistic view of how long things take, agency team members can often cut response time by merely taking small, continuous steps and providing frequent progress reports.

#### 5. ESTABLISH A FORMAL CLIENT COMMUNICATIONS SYSTEM

Chapter 12 provides details on The Gable Group's approach to formalizing communications with a combination of written reports, regular meetings and phone contact. The most apparent values of such a system are three-fold:

- Establishing with the client an expectation of consistency that creates a comfort level about what the agency is doing.
- Establishing with agency staff an expectation of client service to which they are accountable.
- Ensuring understanding between agency and client on decisions impacting the program. This helps minimize disputes over agency activities and expenditures.

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## 6. MEET DEADLINES

Deadlines should be considered sacred for both client and agency, and establishing a “deadline ethic” can facilitate programs and results. Setting deadlines ensures that the agency team is focused on short-term goals. They often have the same effect on clients, who realize that their failure to adhere to deadlines will hamper the agency’s ability to perform for them.

As important as setting them is making sure that deadlines are real and realistic. False deadlines — those set for no apparent reason — fall into the “cry wolf” category that can lead to ignoring real ones. Unrealistic deadlines can lead to reduced quality and frustration on both sides of the relationship.

## 7. MAINTAIN DETAILED FINANCIAL CONTROLS

Since financial arrangements have been agreed to in advance, the remaining task of client service is to track budgets and provide financial accounting that can be understood by client contacts. Our agency sets a simple goal: provide invoices and budget tracking that are so clear the client can approve payment the same day the invoice is received.

Clearly, it is insufficient just to *track* the cost of the program. Part two is to make sure that the agency is meeting the budget and adding value, so adjustments aren’t required.

## 8. DEAL WITH MISTAKES

Most managers on the client side are aware that mistakes happen to even the best agency team. In most cases, when the agency has worked hard to build equity into the relationship, mistakes are understood, accepted and forgiven (even if the agency must pay the price in hard dollars or over-service!). Some studies have shown that client/agency relationships become even stronger after the agency has handled a difficult situation in a professional, mature, proactive fashion.

Less forgiving is the client who finds that his outside team has avoided dealing with a mistake, eroding trust and professional confidence. While agency managers may set a “zero defect” goal for staff, equally important is the establishment of a workplace environment in which the reporting of mistakes internally is encouraged and insisted upon. Some firms recognize staffers

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who make mistakes, then overcome them. Others “celebrate” mistakes with humorous awards. The concept is NOT to beat up on the person making the error. Get people moving quickly toward providing solutions, rather than pointing fingers, assigning blame and being defensive. This wastes time and energy. Stop whining and start winning, by following this basic approach:

- Reveal the mistake to the internal team and agency management.
- Assess the seriousness of the situation.
- Brainstorm solutions.
- Contact the client, take responsibility for what exists, then exert leadership in providing solutions.
- Assure the client, if needed, that such occurrences are rare in agency life.
- Be candid in your language; don’t equivocate or soft-pedal.
- Challenge the team to go beyond the ordinary in driving for results and proving its worth to the client.
- Make good on make-good promises.

## 9. COMMUNICATE YOUR CAPABILITIES (AND KEEP THEM GROWING)

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The axiom that growing business with existing clients is cheaper and easier than generating new clients offers a major benefit beyond added revenues: *clients like it!* Some of the worst words we’ve ever heard from clients (other than “We’ve decided to change agencies.”) are “I didn’t know you could do that!”

Based on this truth, agencies can quit being shy or feeling guilty about promoting new services to existing clients and launch themselves energetically into a cross-selling program that offers your clients a wider range of services as the relationship grows. The Gable Group does this in client meetings and presentations, through a monthly e-mail newsletter called *g-mail*, its own media relations program (local, regional, national, trade) and special promotional mailings based on successful programs for others.

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## 10. GENERATE FRESH, CREATIVE APPROACHES

### CASE HISTORY: Talking Turkey

(see page 20)

In love and war, fresh approaches win battles and gain points. Client relationships benefit from fresh thinking as well. One specific strategy can pay big dividends: **Bring at least one new creative idea into each client meeting** (and, of course, meet regularly).

New ideas can be as simple as the next media relations angle or radio promotion. Or they can constitute an entirely new program element such as a special event or trade show support. As covered later in Chapter 7 on “Establishing the Results Ethic,” analyze what you are doing, and what you *aren’t* doing, to move the program forward. Have the team go through this exercise the week before the next client meeting and brainstorm new ideas. Present one and have others ready to go. Do this regularly and you will lead the client into new territories and often increase business. The process, in itself, is important. The value in creating fresh ideas lies as much in reinforcing your worth to the client as in generating a new project.

As a matter of course, consider weekly team meetings that have the creation of new client ideas as a specific agenda item.

## 11. BE A REAL PERSON

Just as most clients are normal human beings, so are agency people. Try to get beyond format approaches, use warmth and humor. Share backgrounds, likes and dislikes, hobbies and peeves, information on family and vacation plans.

Alongside the ongoing information exchange, agency professionals can establish relationships that combine business with pleasure — sharing an evening at the theater or ball game. These extra efforts build relationships and make life more enjoyable for both parties.

## 12. EDUCATE YOUR CLIENT

Since few clients of small and mid-sized agencies have a public relations professional on staff, they may lack detailed understanding of how public relations works.

This cannot be seen as a shortcoming in the client, since he or she was bright enough to hire outside counsel! Rather, this lack of knowledge is reflective of *any* individual entering a new and

### CASE HISTORY: Talking Turkey

**Objective:** Generate a creative idea to gain holiday coverage for a hospitality client's restaurant.

**Solution:** To secure coverage in a major metropolitan area with abundant competition and limited space for holiday food editorial, the agency called into play a key operating principle: bring at least one new creative idea into each client meeting. During a regular internal meeting, the account team tried to look beyond the obvious and find a new hook. What point of differentiation for any food or recipe pitch would be good enough to make the area's prime publication for the Thanksgiving/Christmas holidays? By looking at "what's there and what's not there" and the "flipside," the team found a winner: Don't pitch Thanksgiving dinner recipes, pitch "What to do with the leftovers."

**Result:** The agency approached the food editor with a plan to gain leftovers recipes from the client chef as well as three chefs from non-competing restaurants. The idea flew, resulting in a major color spread prominently featuring the client. Cost: about three hours of agency time.

unfamiliar discipline. Much as an agency can benefit by investing in a learning curve about client products, services and industries, it can equally profit by discerning what information a client requires to understand and judge the PR program. Share information that helps bring the client's "wants" into harmony with his or her real public relations needs. Send copies of relevant stories from the media, new books, tapes of speeches, notes from seminars and personal notes summarizing something you might have learned from another industry that's relevant.

Experience shows that a few common misconceptions can cloud a client-agency relationship from the beginning. It is these (among others) that must be quickly addressed:

- A misunderstanding of what the program will achieve (e.g., expecting publicity alone to successfully launch a product, regardless of distribution, advertising or other necessary marketing activities).
- Confusion between public relations and advertising (clients often see ad placements as results and may see clips in the same light, even though other measurable results occur).
- Limiting activities — by restriction of budget or lack of knowledge — in such a way that the desired results can't be achieved.

All of these points of confusion stem from or result in unrealistic expectations, which must be dealt with in the selling and programming process if a relationship is to thrive.

## THE TWELVE COMMANDMENTS

These twelve guidelines — based purely on common sense, research, experience (successes and failures) and feedback from clients over more than two decades of service — provide twelve opportunities to excel at client relationships. The sections that follow offer some practical guidelines to bring the commandments into daily use.