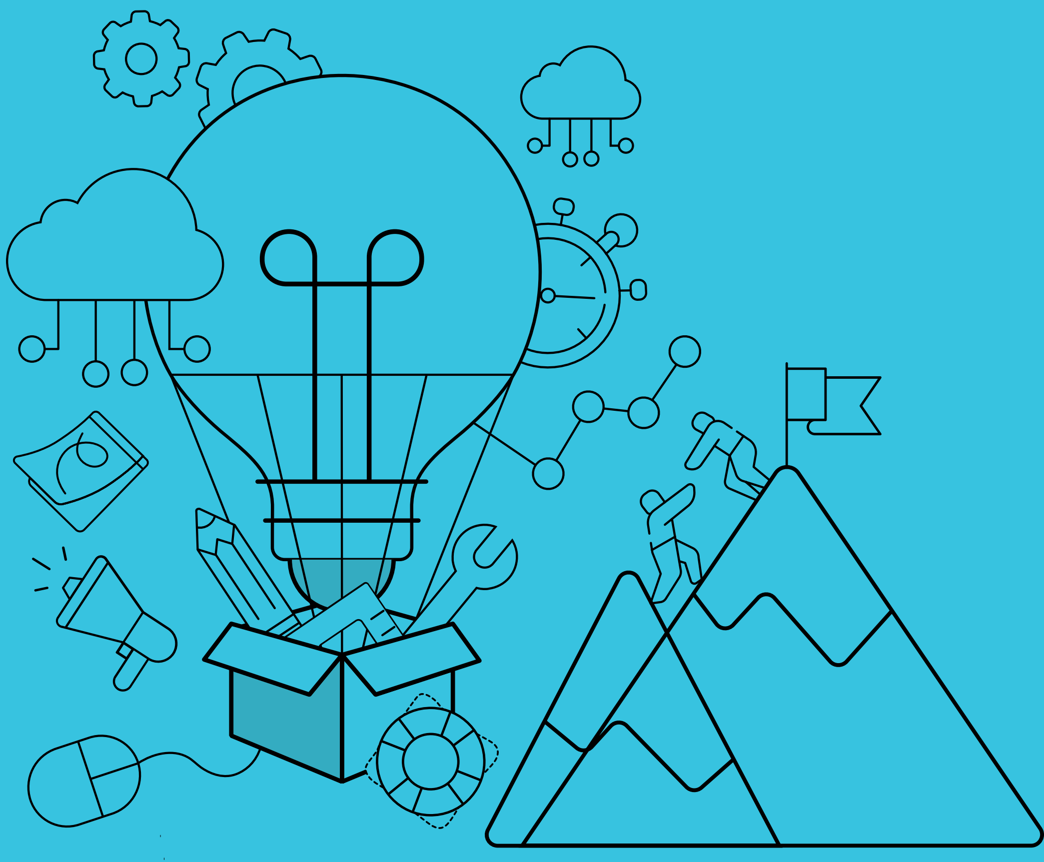
The Agency
Technology Dilemma



How to Pick the Right Tools
For You and Your Clients

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to see how Unito can help your agency tackle tool challenges.

Introduction

Working at an agency is a constant exercise in flexibility. You need to be malleable enough to take on new clients and projects week after week, and to embrace the new ideas, new perspectives, and differing approaches to work that come along with them. But no business can thrive on total flexibility. Agencies still need to have established structures, processes, and tools to help them get the job done. Perhaps counterintuitively, it's this structure that allows agency employees to be so malleable, as there's a solid foundation on which they can build.

With software, this creates an interesting dilemma. Your agency will always have internal tools that you rely on for project management, customer relationship management, communication, development, and beyond. But each new client brings with them a new set of tools that their own team relies on. How can you be flexible enough to meet them where they live without sacrificing the technologies that form the basis of your own team's work?

Agencies tend to approach this issue in one of two ways:

- Try to get their clients to adopt the tools and technologies they use in-house
- Adopt the tools and technologies of each new client

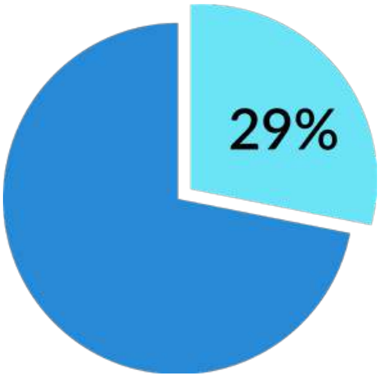
Alternatively, they might try to manage parallel workflows with multiple tools (yikes!), or even try to own all of the work while sacrificing meaningful collaboration with the client.

None of these options will make it easy for your team to succeed, nor are these options really affordable. You'll likely end up:

- Wasting a ton of time trying to onboard clients onto your preferred tools — a surefire way to frustrate them
- Wasting a ton of time jumping around from tool to tool

- Or wasting a ton of time onboarding your colleagues onto new tools, while trying to integrate your existing methods and templates into an environment where they just might not fit

A Gartner survey of CMOs found that a remarkable 29% of marketing budgets is being spent on technology — "the single largest area of investment when it comes to marketing resources and programs."



So what happens when you, or your customers for that matter, have to buy more tools or more seats in order to accommodate one another? Where are you going to sacrifice budget in order to cover that additional spend?

Instead of settling, agencies need to proactively approach the technology dilemma right down the middle. You need to find a means of keeping your team working where they're comfortable while offering the same luxury to your clients. This starts with picking the right tools.

Usage Versus Adoption

The barrier to usage is low, while adoption requires a far bigger investment.

Tool adoption vs. tool usage

As an agency, the difference between adoption and usage should be one of the first conversations you have when choosing a piece of technology.

Adopting a tool means bringing it into your daily work: taking ownership of it, becoming familiar with its intricacies and how it's used, and being active in that tool moving forward. This often requires a large time investment as you explore the software, train on it or watch tutorials, and work out the kinks in how it's integrated within your workflow.

Using a tool is far less demanding. It can be as simple as turning on the television. Have you ever used an analytics dashboard that you didn't create to see how a piece of content is performing? Maybe you've clicked a link in a calendar invite and opened up a video chat platform for a meeting? In these situations, you're using these tools for work, but you're not adopting them. You're not doing any onboarding, learning the ins and outs, or changing how you work each and every day.

Why is this distinction important for agencies? Because a lot of the time, you and your clients won't actually need to adopt each other's tools. You'll only need to use them.

For example, you might:

- Send clients a link to an analytics dashboard so they can monitor campaign performance
- Demo your proposed user workflow in a visual whiteboard software
- Invite them to weekly check-ins through a video chat tool
- Pull a list of contacts from a CRM system so they can prioritize who they reach out to

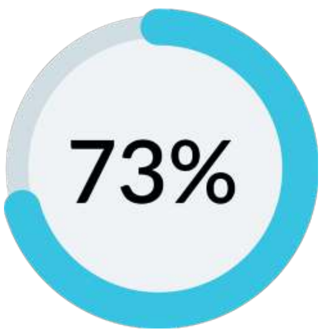
All of these are examples of situations in which clients are using, not adopting tools. They won't require training. They won't require access.

The barrier to usage is low, if not non-existent. And, most-importantly, nobody needs to change the tools they use each day for these interactions to function.

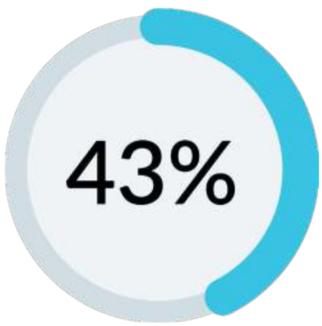
When picking what tools are right for your agency, consider to the best of your ability whether or not clients will be using or adopting them. If the answer is "using," then you can move forward with picking the tool that works best for your team without giving it a second thought. If the answer is "adopting," you'll need to put a lot more thought into picking the right tools.

The qualities of a good agency tool

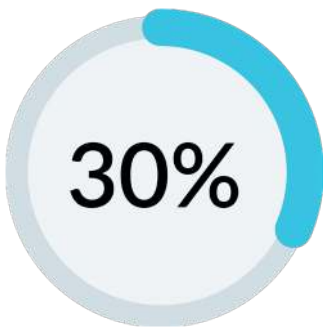
In a survey of 500 marketing executives by Conductor:



of executives said they used **more than five tools**



of executives said they used **between six and ten**



of executives said they used **more than ten**

That's 10+ personal onboardings, 10+ training sessions for your team, and potentially 10+ more training sessions with clients.

Now imagine you get it wrong, and a few months into a using a tool you decide it's not the right fit. Restarting that process can be a time-consuming nightmare.

That's why choosing the right software from the getgo is so imperative for agencies. You don't have the time or the money to waste bouncing around between tools. Investing more effort into actually picking the correct tool from the start will save you tenfold the effort down the line.

What makes a tool right for an agency? Obviously every situation is unique and depending on your niche, your clientele, your size, and your budget, you might have different requirements. That said, there are some common traits that most agencies will want to consider when deciding on software.

Key software traits

Scalability

While you may not have plans to hire anytime soon, you don't necessarily know what kinds of clients or projects are going to knock on your front door next week. If you choose a tool that is built very specifically for one size of company or project, you'll have a really hard time growing beyond that size to tackle any outliers. That's problematic since outliers, especially bigger-than-usual clients or larger scale projects, are often the most profitable for agencies.

This doesn't mean that you should immediately buy the enterprise plan of every SaaS tool that your five-person agency uses each day. It means picking tools that can be scaled IF needed. Most SaaS tools do provide different plan levels — typically a personal, a team, and an enterprise option — but not all of them make it easy to switch between plans, especially if you need to return to a lesser plan once the contract or project is complete.

When picking software, determine how easy it would be to scale to a larger or lesser plan as needed. See how difficult and expensive it would be to add more seats or increase the number of users at each level. And consider whether you can be billed monthly instead of annually, in case you need to make rapid changes. The more flexible a tool is when it comes to scalability, the more compatible it will be for agencies.

Customizability

When you buy ice cream, do you get sprinkles? If not, would you go to an ice cream parlor that had mandatory sprinkles? "Sorry ma'am, we can't *not* add sprinkles." You would be checking Google maps for the next closest parlor before you even walked out the door.

Every client has different needs and expectations. Agency life demands tools that can adapt to the customer, or the customer will look elsewhere. Much like with scalability, the customizability of a tool provides your business with the flexibility to cater to outliers, adapt to every new situation, and generally provide a more personalized experience.

When trying to determine the customizability of a tool, your best bet is to speak with a sales rep or jump into the tool yourself and play around. Can you arrange how information is displayed or is there only one possible view? Can features and functionality be added or turned off? Can you build your own fields or filters? Being able to customize your tool means being able to provide clients with an unforgettable, tailored experience.

Accessibility and permissions

The entire technology dilemma faced by agencies is the result of needing to share their tools, in one way or another, with clients. With that in mind, you need to consider all of the accessibility and permissions options of each and every tool in your suite.

In terms of accessibility, this goes back to the question of usage versus adoption.

For tools that clients will be using, you'll need to be able to provide viewing access or create some sort of public, shareable link. If a tool requires a seat or full access to simply view a report or dashboard, it's likely not right for an agency setting. If clients will be adopting the tool, you will need to have the ability to create new users, and specifically new users from outside of your organization.

That second situation explains the importance of permissions. If you're providing clients with full access to your tools, you need the ability to set different permission levels — essentially different degrees of access. This is absolutely essential since you don't want them to be able to access other client projects or internal work, or be able to change organizational settings. You also probably don't want them to have permission to add new seats and users, add new applications, or otherwise make changes that could impact how much you actually spend on the tool. Good tool permissions allow you to share access to everything the client needs, and nothing more.

Security

Security features are another important element to consider when evaluating software tools. This is very much related to the question of access and permissions previously discussed. If you're providing a variety of clients with access to your agency tools, each new user comes with a certain degree of risk. Even if they only have access to certain parts of the tool, you don't know how seriously your customer takes password protection, whether they're trained to recognize phishing schemes, or whether they have secure internal processes for sharing access through a tool like LastPass.

Essentially, agencies need very secure technologies, since they can't maintain full oversight when it comes to client usage of tools. Evaluating SaaS tools for security means researching — or ideally speaking to a sales representative about — their "encryption, authentication policies, incident handling, and application security." Internally, make sure your tools are approved by your IT or development team if possible.

Reporting and time tracking

For most agencies, this will go without saying. You need to show clients that the work you're doing is making an impact on their bottom line or their campaign KPIs, and reports are how you share that information. Manually building reports is often time-consuming and difficult, so agencies will frequently rely on reports created by their digital tools

But anyone at an agency knows that simple reporting is no longer enough. Customer expectations have evolved, and clients will often have very specific data needs. As a result, agencies need tools which allow you to go beyond simple analytics. A good agency tool will allow you to build custom reports so you can be far more selective on the metrics they track, and the parameters around how and when they're tracked. Many clients will also expect nearly constant access to that data. Rather than having to pull and share reports, a tool that offers live dashboards has a huge upside from a client management standpoint.

While it might not relate to the campaign KPIs, time tracking is also a huge asset to have in a SaaS tool. Any agency that works on an hourly rate knows how challenging it can be to track time spent on projects. And growing agencies can take a loss on new projects due to under-quoting for work hours they can't wholly predict. Reviewing time spent on tasks after the fact helps better set up budgets for the next project and build firmer and more reliable deadlines. Thankfully, many tools now have built-in time-tracking functionality or have integrated apps that provide it. That's something to keep an eye out for as you shop for new software.

Don’t debate. Integrate.

Integration allows both the agency and the client to use their preferred tools.

The integration solution

Perhaps the most important thing to look for in an agency tool — so important, in fact, that we gave it its own section — is integration capabilities.

We introduced this eBook by talking about how agencies are either being forced to adopt the digital tools of their clients, or they're forcing clients to adopt their internal tools. As discussed, both options leave one of the two parties unhappy and create a massive amount of work when it comes to onboarding and process transfer. Integrations essentially eliminate this tough choice.

Almost all SaaS tools now support integrations in some form. As the usage of these technologies grew in prominence, there was a recognition that businesses will always rely on a suite of tools rather than a single tool to get the job done. The companies behind the biggest SaaS tools understood that making it easy for all of the tools in that suite to work together would benefit their customers, and likely their bottom line. Most of these tools now have integration marketplaces, which provide apps with wildly varied levels of functionality. These apps might allow you to simply pull in information from one tool to another, they might trigger an action in a secondary tool, or they might add very specific functionality to your tool (like the aforementioned time-tracking, for example).

Beyond the tools themselves, independent companies have emerged to provide integration solutions. The biggest among these tools — Zapier, IFTTT, and others — tend to work on recipe-based automation. Essentially, this means "If [x] happens do [y]." For an agency, this might mean:

- If I create a task in my project management tool, create the same task in the project management tool of my client.
- If my client sends me an email, make it appear as an issue in our customer service tool.

- Post a message to the agency Slack every time the client updates this Google doc.
- Any new Zoom meetings are copied into Google Calendar.

There's a ton of value to be had in simple automations like this. These integrations can help you and your clients reduce the amount of time spent dealing with your disparate tools. They'll save you from copying and pasting information between different platforms, and may even allow both parties to spend most of their time working in the tools they're used to. But there's an even better way to use integrations to tackle this agency challenge:

Solving the technology dilemma with Unito's two-way sync

While recipe-based automation is a helpful means of saving time and effort, you may have noticed that the actions happen in one direction: you build a recipe, it gets triggered, information flows from one tool to another. But what happens when you want information to flow back to that other tool? Then you need another recipe. And what happens when you want many different bits of information to be exchanged? Then you end up in a situation where you need many, many different recipes for each different client and situation. Since the goal is to save you time and effort, this suddenly doesn't sound like an ideal scenario.

Two-way sync goes well beyond those simple automations. Rather than working with triggers, you're essentially creating an open channel between tools in which information can flow freely; you're parting the sea that keeps project details siloed in specific technologies. With just one two-way sync, you can have your agency team and your client team working on projects, dealing with tickets, and nurturing sales opportunities without ever switching between tools. This doesn't only apply to a single piece of information either. From due dates to comments to custom fields, it's all included in a sync.

What does this look like in practice? To revisit one of the bullet points above:

- If I create a task in my project management tool, create a corresponding task in the PM tool of my client. Any time an update is made in either task, the corresponding task will be updated as well. Both the client and the agency can communicate, review work, make requests, and monitor progress on tasks from the tool that they already know and loves.

Unito's two-way sync

In essence, two-way sync removes the need for agencies to choose between your own tools and those of your client. You can collaborate without having to pick a side, without having to do new onboardings or spend the money on new technologies.

Unito currently offers two-way sync for 10 tools (with more on the way) that typically require full adoption from either the agency or the client. They are:

- Jira
- Asana
- Trello
- Wrike
- GitLab
- GitHub
- Bitbucket
- Basecamp
- Zendesk
- HubSpot

You can try Unito for free for two weeks to see if it's right for your agency.

Get in touch at

hello@unito.io

for more information

Tool recommendations

Now that we've gone over what to look for in an agency tool, here are some popular SaaS options that meet the qualifications, broken down by function.

Project management tools

Asana

Asana is an amazing organizational tool, helping people stay on task and hit their deadlines. Agencies will appreciate its marketplace of over 100 tool integrations (including time tracking and reporting), as well as its Portfolios feature, which allows you to see (or provide) real-time project progress overviews. Asana also generates Gantt Charts automatically from the tasks you input — great for showing timelines to clients — and allows for infinite subtasks, making complex, layered projects a breeze to organize.

Wrike

Among project management tools, Wrike is known for its customizability, with plans and workflows for any department or company size, functionality-based add-ons, and a marketplace of over 400 apps. It is one of the only tools with built-in time tracking and offers powerful reporting options, including a workload tracker for your team. Finally, it boasts enterprise-grade security and offers infinite subprojects in addition to subtasks.

Trello

Loved by countless agencies for its ease of use, Trello is a very simple, straightforward project management option — which might be what you want when working with clients. It's easy to onboard, easy to scale, and easy to integrate with. Public boards make it effortless for agencies to collaborate with customers without sharing tool access. Plus, Trello has Power-Ups (integrations) for just about any functionality you might need. There's a reason Trello is the most widely-used project management tool.

Communication tools

Slack

For agencies with a number of clients, email can be a total productivity killer. It's no wonder so many agencies rely on Slack as a means of escaping inbox overload. Slack is easily scaled, and clients can be added to only specific groups or projects for easy collaboration without granting full access. With a ton of integrations to boot, Slack is an invaluable agency communication tool.

Zoom

Video conferencing is a great way to quickly connect 'face-to-face' with clients or distributed teams without forcing anyone to travel. Among video tools, Zoom stands-out for its scalability (up to 500 participants, for those huge enterprise customer teams) and its stacked marketplace of integrations. It's definitely a high-end solution, and is made for larger teams and organizations.

G Suite

G Suite is an interesting communication option for agencies become it provides video conferencing, live chat, shared calendars, email, document collaboration, and storage, all in a single solution. Video conferencing doesn't require clients to have Google accounts to use, while Google Drive's permissions functionality makes it easy to provide limited access to clients.

Sales and CRM tools

HubSpot

With products split into marketing, sales, and service, with different pricing plans for each, HubSpot has something for any agency. At the same time, its strength is that all of these products are connected, so you can follow a lead through the entire customer journey from a single tool.

Salesforce

With products catered to sales, marketing, commerce, and beyond, specific services based on industry, company size, role, and need, and a massive app exchange filled with integrations, Salesforce has few rivals when it comes to customizability. While it may be a bit too pricy for small agencies, there's no doubt that it's the tool of choice for large organizations.

Pipedrive

Though it's one of the simpler CRM options, Pipedrive still provides users with the ability to customize their experience. It can be set up to meet the exact needs of your agency, and has over 100 integrations to extend its built-in functionality.

Key things to take away

Agencies face a true challenge when it comes to picking digital tools. Why? Each new client will have their own preferred tools, and traditionally this meant forcing one side to switch technologies. But there are ways to ease this process or even avoid it altogether.

Tool adoption vs. tool usage

First, make a distinction between the tools clients will need to use and the tools they'll need to adopt.

Use means:

- Simple view without taking any action
- May not require any training or onboarding
- May not require actual access or will only need limited permissions

Adopt means:

- Requires actual tool access
- Will be active in the tool, taking action
- Will likely require onboarding or training

Tools that clients will only use can be chosen entirely based on internal agency preferences or needs. Tools that will be adopted require far more consideration.

The qualities of a good agency tool

When choosing agency technologies that may need to be adopted by clients, there are certain qualities you should always look for:

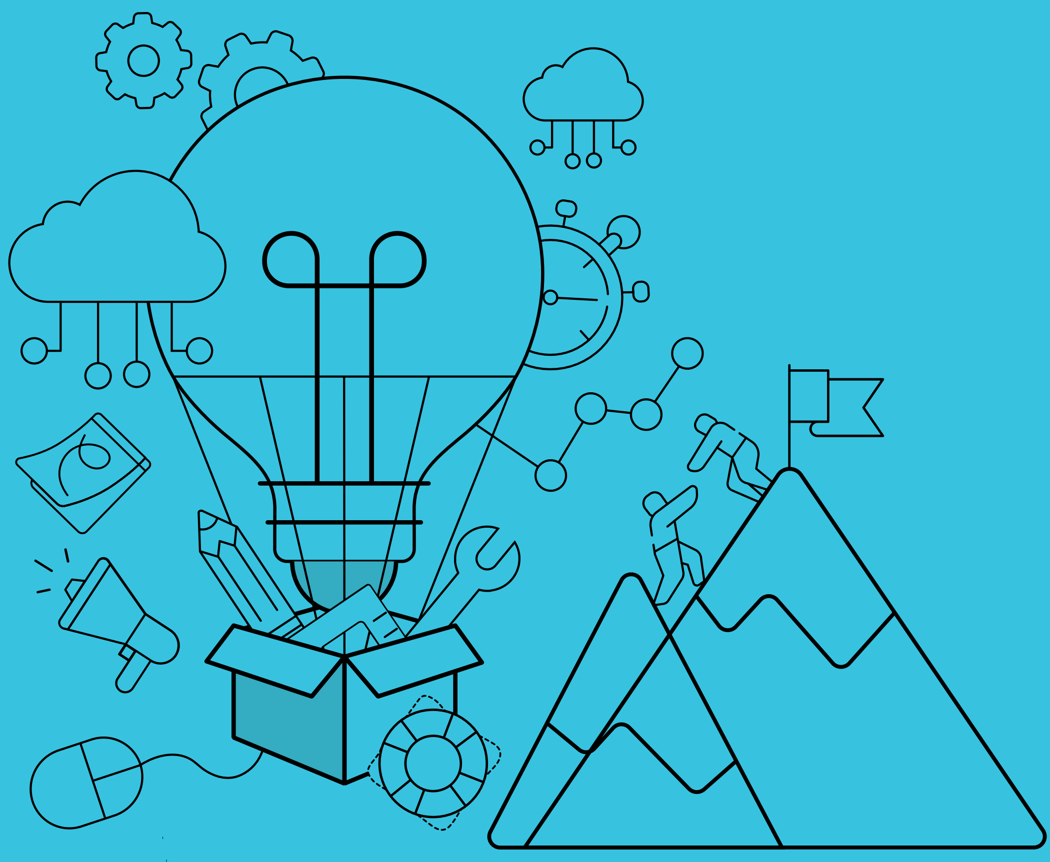
- Scalability
- Customizability
- Accessibility and permissions
- Security
- Reporting and time tracking

The integration solution

Perhaps the most vital feature of agency tools is integration capability. Integrations allow you to avoid ease or avoid the technology dilemma by making your tools and those of your clients work together or interact.

Integrations tend to fall into three categories.

- The first is marketplace apps that have limited functionality but allow for very specific interactions between tools.
- The second are external recipe-based automation tools that provide more interaction capabilities but require more upfront effort and tend to be limited in scope.
- The third is two-way sync, which opens a lane between tools for a free flow of information back and forth. With Unito's two-way sync, both the agency and the client can work in the tools they know and love while still collaborating on projects.



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