



HubSpot teamwork.

# When Projects Go Wrong

Agency experts talk about what caused projects to go wrong in the past, how they solved these challenges – and what you need to know to avoid making the same mistakes.





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# Introduction

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We all have projects that go beautifully according to plan. They're the jewels of our CVs and case studies, recounted proudly at quarterly reviews, interviews – maybe even the odd dinner party. They're the projects that were delivered on time, under budget, and within scope. The unicorns. The five percent (if we're being optimistic).

This ebook is not about those projects.

This ebook is about the other ninety-five percent. The headaches. The two week project that took two months.

And as we all know, as an agency, when one project goes wrong, it has a knock-on effect.





That's because you're not just responsible for your own business; you're responsible for your clients' businesses, too.

So when things start to go south, it has consequences not only for your team, but also for your client's team, the other clients on your roster, and even your agency's reputation.

We spoke with various experts from the agency world and learned from their experience. These experts have weathered every disaster in the book – from simple miscommunications to clients from hell – and have come out the other side not just unscathed, but stronger.

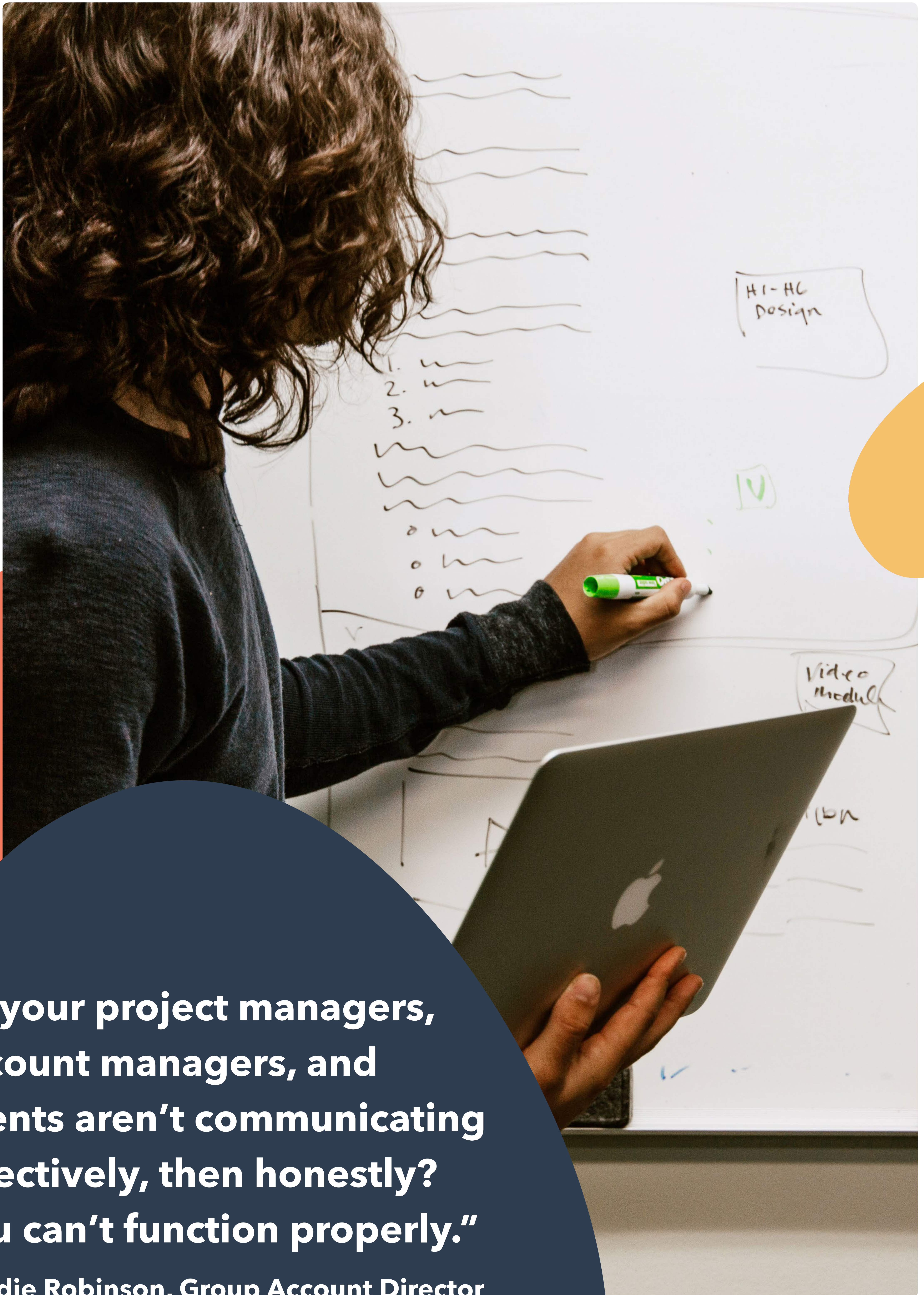
The best part? They've generously shared their hard-won insights and expertise with us, so your agency can avoid falling foul of the same common project management pitfalls.

Before we dive in, let's introduce the experts who so kindly shared their time and wisdom with us:

- Eric Pratt, Managing Partner at Revenue River
- Marc Herschberger, Director of People and Process at Revenue River
- Abby Thompson, Director of Marketing at Salted Stone
- Christian Welborn, Account Manager at Salted Stone
- Perry Nalevka, CEO and Founder at Penguin Strategies
- Michael Kegen, Director of Marketing Operations at Penguin Strategies
- Jodie Robinson, Group Account Director at Velocity Partners

Here's what they learned from their projects that have gone wrong – and how they used them to become better than ever.





**"If your project managers,  
account managers, and  
clients aren't communicating  
effectively, then honestly?  
You can't function properly."**

**– Jodie Robinson, Group Account Director  
at Velocity Partners**



## Chapter 1

# Communication Breakdowns



The first thing that almost everyone we interviewed told us? Communication is paramount.

In fact, almost all of the project problems our experts talked about could be traced back to poor communication. With a little digging, it was found at the root of everything from scope creep to delivery delays.


That means we're going to see it a lot throughout this ebook. But the main takeaway? Communication issues are multifaceted, and there's no "one size fits all" solution.

Sometimes, we heard, problems would arise due to under-communication, like vague feedback from a client.

Things like, "The website looks great, but could we make it a little more exciting?" – without really explaining what "exciting" means to them.

At times like these, it can fall on the account manager or production team to fill in the gaps, which can cause problems.

"That's when we start to get some issues where we're not exactly on point and we need to revisit tasks, or have a follow-up call to clarify some things," Christian Welborn, an Account Manager at Salted Stone, told us. "And that delays things and can add hours to the project."



For Jodie Robinson, Group Account Director at Velocity Partners, the importance of real-time, in-the-moment communication in situations like these can't be overstated.

"With briefs, I've heard of other agencies delivering them over email or instant message and assuming the other person will know what to do," Jodie said. "We insist as much as possible on face-to-face or video – some sort of two-way communication – to get things started right."

For Eric Pratt and his team at Revenue River, however, it wasn't under-communication they were worried about.

"We always want to be transparent with our clients. For a while, we thought that meant giving them a really granular level of visibility over the details," he said. "But the result was that they became swarmed and overwhelmed with communication."

"It was information overload for the clients," Eric said. "We had one local client who would come in to the office for a meeting once a week. One day, he turned to me and said, 'I am drowning in notifications. I can't keep up – I'm just leaning on this meeting to keep track of all this stuff, because I can't keep track of it with the rest of my job.'"

What was intended as a good-faith way of keeping clients in the loop ended up causing more problems, not less. But it also led to Revenue River doing some deep dives into their process – and making some serious improvements.

"We learned our lesson fast and hard by oversharing, basically," Eric said.





Now, they utilize the RACI model to develop a communication matrix that's right for their clients and their team, ensuring that every person gets the level of visibility that's right for them. That means that at the outset of their project, they identify who is Responsible, who is Accountable, who needs to be Consulted, and who needs to stay Informed.

From there, they're able to use the tools in their tech stack to help them dial the level of communication up or down, depending on each person's status and individual preference.

**"It's allowed us to have the best of both worlds, because we still have all that granular detail, but we're not bombarding people who don't need – or want – to know it," Eric said.**





**“And we can still be transparent by giving them the right visibility, just not necessarily all of the visibility,” added Marc Herschberger, Revenue River’s Director of People and Process.**

The importance of communication was underpinned by everyone we spoke to. But when a lack of communication can cause issues, and too much communication can cause issues, how do you find the right balance?

It all comes down to correctly setting expectations and building your client relationships.

## **Key Takeaways**

1. Communication needs and wants differ from client to client (and even from person to person within those client companies). The more you can tailor your communication, the better it will be.
2. Oversharing can be as bad as undersharing. Try to find the Goldilocks amount of communication in each case: not too much, not too little.
3. Having an org chart or accountability matrix can help you to figure out who needs to know what and when.
4. Your software should be flexible enough to cater for all these different levels of client communication preferences – not dictate a one-size-fits-all approach.



## Chapter 2

# Misalignment

No two clients are alike. Everyone has their own communication preferences, ways of working, and overall business goals.


And when you're not on the same page as your client? It can backfire – badly.

“With new retainer work, a lot of times it won't have been scoped out to the nth degree during the sales process,” Perry Nalevka, CEO at Penguin Strategies, told us. “We had a project recently where we thought it was going to be a website redesign and it turned out to be a full rebrand.”

Those are two very different projects, with very different timelines, deliverables, and resource requirements. (More on that shortly.) With some transparent, honest communication and expectation-setting, Penguin Strategies was able to turn the situation around – but needless to say, they would have preferred to have been on the right path from the very beginning.







Jodie at Velocity had some similar cautionary tales. “We’ve fallen into the trap a few times of ‘Let’s just get started, we’ve got a tight timeline, we’ll figure it out as we go along,’” she said. “That generally never works.” It’s a false economy: you think you’re saving time by diving headfirst into the process without delay, but taking action without thorough planning can lead to misalignment that ends up costing you more in the long run.


When it comes down to it, if a client goes in expecting X, and you think you’re expected to deliver Y, neither of you are going to come out of the engagement happy.

So how do you solve for X before it’s too late?

For Jodie, it all comes down to alignment – both between the client and the agency, and within the agency team internally. As she says:

**“Ultimately, we’re a service business, and it’s our job to make sure we’re delivering the right outcomes for our clients. If we’re not all in agreement about what they are, then the chances of the agency getting it right are very slim.”**





When discussing this with our experts, we found a few practical ways they've learned from their experiences and built alignment into the fabric of their processes.

Some of the classics couldn't be beaten, like kick-off meetings, documented briefs, and, for internal teams, daily standups.


But some of our experts went one step further and restructured the whole way their agency builds and develops their client relationships.

"At Velocity, we have dedicated project managers for each client," Jodie said. "It really allows us to understand each client, and their business, in depth. Having that knowledge and understanding of their individual nuances, ways of working, and the ways they like to be managed and communicated with has been really valuable for us."

Salted Stone take a similar approach. By working in smaller business units, they can tailor their approach based not only on client preferences, but also individual unit preferences, making for smoother communication and more personalized workflows both externally and internally.

"The business units allow people to communicate as a team in the ways that work best for them," Christian told us. "Some units love to have more structured weekly meetings and daily standups. Other units don't really like that structured approach; they prefer to all sit together so that at any moment they can just pop up over their computer and communicate something – it's more like a group stream of consciousness about the client rosters they have."





With these approaches, not only can you match the right client to the right business unit or dedicated project manager – at Salted Stone, some business units even specialize in different types of industry for even more tailored expertise – but you can also focus on developing a long-term relationship with each client that’s unique to their needs, preferences, and objectives.

And with that kind of insider knowledge? You can create pitch-perfect work that keeps your best and biggest clients happy – and establishes long-lasting, mutually beneficial relationships.

## Key Takeaways

1. Take the time to scope things out fully at the start of the process. You might feel like it’s slowing you down, but it will lay a stronger foundation for every single thing you do from that point on.
2. Get crystal clear about what constitutes your project’s “success”, so you all know that you’re working towards the same goals.
3. The ol’ reliables – kick-off meetings, regular standups and progress reports, and steady documentation – still go a long way.
4. Focus on building long-term client relationships that will benefit both your clients and your project managers. (And maybe even consider restructuring your teams to support that objective.)



## Chapter 3

# Timelines, Budgets And Resources




When you're in an agency, you have limited resources to play with: limited time, limited money, and limited human power. (No matter how great your best people are, they probably still have basic needs they need to take care of, like sleeping, eating, and watching Netflix.)

These types of limitations are a challenge for any business. But that challenge is amplified for agencies: not only are you working with constantly-evolving client requirements, but you also need to think about your own company's growth, and be able to quickly gauge whether you have the bandwidth to take on new business in a given period.

"We have a finite number of resources, and it's enough if you plan correctly," Jodie at Velocity told us. "But because of the nature of the business, you can't be certain about what's going to happen. We encounter issues almost daily: clients running late with feedback, a new stakeholder comes in unexpectedly, the creative teams maybe just simply need more time to do the work."

"That automatically has a knock on effect on everything else," she explained. "But then you still need to stick to the same timeline so there's this constant battle between what the priorities are and how we can steal resourcing from another project without putting another one in jeopardy."





## **Knowing how to allocate your resources – and having a full picture of the resources you have available to allocate in the first place – is essential to maneuvering your way through tight deadlines and shifting timelines.**


To correctly allocate resources, you need to always have the bigger picture in mind. And to do that, you need to be tracking everything, so that you know exactly where your team's time and energy is going, what's due when, and how many hours (and dollars) you still have left to apportion out.

At Penguin Strategies, those insights are the key to knowing exactly what's working, what's not, and what needs immediate attention.

"I need to know the profitability of every account, every month, so I can identify which ones are the issues and dig down to see why," Perry explained. "That can only be done if you're tracking everything." And if you're not? "Any agency not doing that is going to find out how important it is when it's too late."

It's a practice that has both long-term and short-term benefits. Not only does it help you to spot any resourcing issues or deadline deviations before they happen, it also helps you to build up your own bigger picture about how you're delivering overall and where you can improve.





For example, Eric and the team at Revenue River realized that they needed to rethink their communication process when it came to delivering work and making sure they hit their deadlines.

“The majority of our projects that have stretched beyond a timeline have had miscommunication issues,” Eric noted. “There were times when we didn’t tell the client what to expect next, or we sent something in an email that would have been more productive to review together.”

Waiting for client approval – especially when it comes to getting sign-off from multiple stakeholders on larger pieces of work – can be time-consuming. If you’re not careful, it can quickly derail your carefully-constructed timelines.

Now, Eric said, they’ve learned ways to communicate better around deadlines, build in feedback checkpoints, and make sure they don’t lose momentum. “Now we pre-set things up,” he told us. “We’ve become really diligent about building in review dates and schedules ahead of time.”

“So instead of sending something creative over email and waiting for feedback, we’ll make a point of contacting the client in advance to say, ‘I should have this ready to review on Monday, let’s set up some time for that afternoon to review them together.’” Not only does this reassure the client that concrete progress is being made, it also helps to ensure you get timely feedback on what you’ve presented as well, so you can keep things moving.

It’s probably unsurprising that, as with so many of the project fails we’ve seen so far, a little communication can go a long way to preventing and remedying these kinds of logistical problems.

But what about when your timeline is starting to get out of hand for other reasons?





## Key Takeaways

1. Your team is the most valuable resource you have. You (probably) can't clone them, so you need to be savvy about how you allocate their time and energy.
2. No matter how prepared you are, things are going to change. The project plan you made at the outset is valuable, but it's even more valuable to be flexible, know where there's wiggle room, and be able to think on your feet.
3. Track everything – otherwise you won't know you're off-track until it's too late.
4. Build in client feedback checkpoints in advance to keep everyone accountable.



## Chapter 4

# Scope Creep



Like the name suggests, scope creep can ~~creep~~ sneak up on you.

A small change here, a quick fix there, a new stakeholder coming in halfway through the project with a few “minor” additional ideas – and before you know it, the goalposts have shifted, you’re being asked for things that weren’t originally agreed upon, and you’re no longer sure which (or whose) definition of success you should be using as your measure.

But because scope creep is a gradual slope, not a sudden precipice, it can be hard to spot scope creep until you’ve already tumbled over the edge. And by that time, your team could have spent hours on things that weren’t part of the agreed brief – none of them billable – and burned through resources that were supposed to be used elsewhere.


It’s a lesson that even the best agencies have had to learn. To complicate matters even further, just because something deviates from the original plan doesn’t mean it’s scope creep.

For starters, sometimes you consciously want to go above and beyond for the client – not because they’re asking you to, but because you see an opportunity to add extra value and really dazzle them.

“It’s an art, not a science,” Eric at Revenue River told us. “We have a good reputation for giving beyond the contract and it’s nice to be able to give something extra.”

You just need to ensure that what starts as an extra doesn’t become an assumption down the line.





“When you do it, you need to set expectations,” Eric advised. “The client needs to understand that they’re getting a give; it’s not a recurring thing, it’s not the first of fifty gives, it’s a give that we want to do for them.”

And then, of course, there’s the issue that what can initially seem like scope creep can also simply be due to natural, expected adjustments in the project’s direction as it progresses.

“Scope creep isn’t always responsible for fluctuations,” Christian Welborn explained. “Sometimes, things are within scope but changeable.”

Eric agreed. “Projects do change,” he said. For Revenue River, the key was to start getting better at identifying where they could make substitutions and where they would need to create change orders. “So we’ll say, ‘This is what’s included, and we can be flexible within this box.’”


Having those “crucial conversations”, as Eric calls them, is essential, because – surprise! – it all comes down to communication (again).

The team at Revenue River tries to approach the discussion as openly as possible.

“When we’re presented with an ask, we’ll say something like, ‘Absolutely – as you know, that wasn’t really part of our project scope, but we’re happy to do that for you and always welcome more work,’” Eric said.

Then, he tactically – and tactfully approaches – the ask with a problem-solving attitude. “We’ll talk to the client about how they want to handle it: are we trading something out





so it's not going to hurt your numbers, are we adding it, are we deprioritizing or pushing something else out? Just really embrace it head-on in a positive, non-confrontational, open manner."

When it comes down to it, he says, "it's not 'can't, won't, screw you, that's going to cost you money'. It's 'how do we find a solution to this?'"


That said, it's worth recognizing that unfortunately, you won't always have the resources or bandwidth to take on work outside the initial scope.

In those situations, it can be enough to sit down with the client and return to the initial agreed-upon brief to reset expectations. Often, the client won't even realize that they're going off-piste – and taking you with them.

Here's where the well-defined and documented outline, kick-off notes, and stakeholder interviews that you captured at the start of the engagement (and read about in chapter two) really come into their own.

Also integral are the tools you've been using to track and manage your work, so you can report back on the exact number of hours, tasks, and resources you've been spending on each task and project.





It's natural that clients won't see the full extent of the work your team is doing behind the scenes, so pulling back the curtain a little to show the bigger picture from your agency's side can help to put things in perspective, show them that you're both working towards the same goal, and gain their trust.

Even though broaching the topic can be uncomfortable, most of the agencies we talked to reported that their clients were understanding and appreciative of their honesty and frankness.

"It can be hard to push back or tell someone no if something isn't possible, especially in the role that I'm in as Group Account Director," Jodie at Velocity told us. "But if you qualify that no, people are generally more sympathetic and understanding – and it's always better than giving a sheepish yes and then underdelivering or letting people down further down the line."

And if your clients aren't taking your (well-qualified, sympathetic) no for an answer? Well then you might have a different problem.






## Key Takeaways

1. Monitor any changes or deviations so you can spot when they're snowballing from "expected iterations" into "change order" territory.
2. Remember that the objective is problem-solving, not confrontation. You and your client are still working towards the same goal: doing something that benefits their business and yours.
3. Where possible, come to the client prepared with a list of options or potential substitutes to help find a solution.
4. Know when to say no. A well-reasoned no is always better than a poorly-thought-through yes.



## Chapter 5

# Difficult Clients



Working in an agency is all about working with people: your team, other teams, clients, stakeholders... you need to engage with all sorts of people, at all sorts of levels.


It's no great secret that people can be tricky. Regardless of industry or role, working together is often both brilliant and challenging, and it's only exacerbated when you factor in the complicated dynamics of the agency-client relationship. That is, they're paying you and they know what they want, but you're the expert and your name is going to be associated with the output, too.

Every agency has client horror stories. But what made those clients so difficult? And, more importantly, how did they deal with them?

For starters, we were happy to hear that a lot of agencies had a zero-tolerance policy against straight-up jerks.







“We expect a level of humanity,” Perry at Penguin Strategies told us. “Just like I don’t want any jerks on my team, I don’t want my team to have to interact with any jerks, either.”


In black-and-white situations like that, the resolution is straightforward: if someone is being abusive or creating an unsavoury work environment, terminating the engagement is the best thing to do for your team and their morale.

But for lots of the agencies we spoke to, it was rarely that clear-cut. Often, we found, there was a fine line between clients being difficult and clients being particularly, well, particular.

Eric at Revenue River summed it up:

**“There are always crappy types of people that do business wrong and try to lie, cheat, and steal. But even the right type of people with the wrong type of mindset can be very, very, very difficult to form a successful relationship with.”**





For example, most agencies will have experience with clients trying to micromanage or over-engineer the wrong things, which can ultimately lead to stalling – or even derailing – the project. And if the majority of your time is spent on minor details that have minimal return, it's hard to make an impactful change for your client.

There are a few ways you can attempt to salvage these kinds of relationships and turn things around, but first you have to dig a little deeper into the underlying causes.


In some cases, you might find that it simply comes down to a mismatch in preferred ways of working. Even if you've done everything possible to align your teams from the beginning and get everyone on the same page, sometimes it's as simple – and as frustratingly human – as two people not really being the best fit together.

For Christian at Salted Stone, the business units allowed them to address this issue without having to do any major reshuffling that could throw off all their other clients.

"In one situation, we were able to determine that it probably wasn't the best personnel fit between the Account Manager and the client," Christian told us. "So we were able to switch the Account Manager on that account to someone else in the business unit."

"It was a very seamless transition, because the other Account Managers and Account Coordinators in the unit already had context for that client and how they liked to work, and they were able to keep the same strategists instead of having to bring on a new team or a new face from our side." It worked.





In other instances, a client might be being especially overbearing or protective for personal reasons – maybe the project is a big professional step for them or there are some internal politics going on in their business that your agency isn't privy to.

In those cases, you can do your best to allay their concerns by giving them more visibility over the project's status, or providing them with evidence of progress that you've recorded in your project management software. As with scope creep, sometimes these clients don't even realize they're part of the problem until you talk them through it and open their eyes.

Again and again, it was those kinds of clients – well-meaning but inadvertently obstructive – that we heard were the most difficult to deal with. And luckily, in many instances, our agency experts were able to right the (relation)ship before it sank completely.

But what if you can't?

It's harder to part ways with a difficult-but-not-villainous client, because they're not bad people; they're just not *your* people.

"Sometimes, clients just aren't the right fit for what we're doing," Perry at Penguin Strategies told us. "At the end of 2017, we let go of almost 20% of our revenue, because those clients weren't a good fit for our niche. We set them up with other agencies and made recommendations, and now we're more strategic about the leads we get and our process for taking on new clients."

It sounds counter-intuitive, but it's a classic case of quality over quantity. Save your resources to really invest in the clients who "get" you and appreciate what you do, and you're also investing in what will hopefully be repeat business for years to come.





# Key Takeaways

1.No jerks allowed.

2.Be strategic when pairing project managers with clients. Take their personalities and working styles into consideration, where possible, and try to find the best personnel match.

3.Is a client over-engineering? Micromanaging? Not trusting your agency's expertise? Have an honest and open conversation about the impact of this on your team. They might not even know they're doing it.

4.Know when to let a client go. If they're not the right fit for your niche, or you're no longer the right fit for theirs, neither of you will be getting the best outcome.



## Chapter 6

# Owning Up To Your Mistakes

We've talked a lot about project management issues that have happened due to breakdowns in processes or communication, forces outside anyone's control, and difficult clients. But what do you do when your own team makes a mistake?


Sometimes, projects go wrong because your agency did something wrong.

And when that happens? It sucks. But it's not the end of the world. In fact, it can be an opportunity to strengthen the relationship between you and your client.

Everyone we talked to had examples of how they could have executed things better, communicated more clearly, or just generally been more efficient.







“We had one website project that was supposed to be built on a platform that we’re not familiar with,” Michael Kegen, Director of Marketing Operations at Penguin Strategies, told us. “But we didn’t do enough due diligence at the start of the process to really understand what we needed to do to fit into that platform. So we went down another road and came out at the end of it with a beautiful website... that just wouldn’t integrate with the rest of their system.” Ouch.

Michael puts that experience down to poor communication, and said that the team at Penguin Strategies has learned to adapt how they disseminate information both up and down to ensure that issues like that don’t happen again.


If you’re lucky, you can detect any blunders and turn things around before anyone else even notices. But surprisingly, we learned that keeping quiet isn’t always the best approach.

When Salted Stone caught a big mistake before it went into production, they didn’t keep it to themselves – they owned up to the client.

“We noticed the mistake, fixed it, and I jumped on a call with the client to explain,” Christian said.

In this case, the mistake was related to the number of tickets available for certain events the client was running, so the fallout could have been pretty embarrassing for the client if it had gone through.





"I said, 'Hey, we made a mistake, luckily we caught it before it became a big issue but if it had gone forward, we probably would have ended up having to tell people that they couldn't actually attend the event because we didn't mean to sell you extra tickets,'" Christian told us.

Fortunately, not only did Salted Stone spot it early and avoid major disaster, but it actually strengthened their relationship with the client – more so than in situations where the client never found out about an error.

"We admitted the mistake and laid out what our process was to fix it," Christian said. "They were pretty impressed that firstly, we admitted it to them at all, and secondly, we had a contingency plan in place."

HubSpot knows a little something about ticket-related screw-ups, too.

In 2015, attendance for HubSpot's INBOUND event had seriously grown. It was amazing to see – but we weren't prepared for that amount of people, and it had some not-so-amazing consequences. Attendees couldn't get in to the sessions they had come to see and were getting turned away after queuing for up to thirty minutes.

We apologized, did everything we could to fix it, held ourselves accountable (we even wrote about that screw-up on the [\*\*HubSpot blog\*\*](#)), and learned from the experience. Going forward, we made significant changes to how we planned and managed the event every year to make sure that we'd never let attendees down again.





In short: it sucked – but it made us do better.

In fact, owning your screw-ups is part of the HubSpot Customer Code. And as it happens, that kind of transparency and accountability is part of Teamwork's core values, too.

At Teamwork, we even have an internal channel specifically for our #fails, so when one person makes a mistake, we can all learn from it.

But it's more than that: the channel builds accountability into Teamwork's company culture.

**When you see everyone from interns to the CEO acknowledging their mistakes – little mistakes, huge mistakes, mistakes that accidentally turn into wins (less rare than you might think!) – it shows that failures aren't as catastrophic as they first seem.**

And most importantly, when you feel comfortable admitting your mistakes, you also get more comfortable thinking outside the box and doing the kind of challenging work that, yes, can go wrong – or can become something exceptional.






# Key Takeaways

1. You will make mistakes. What matters is how you handle them.
2. Hold yourself accountable. Admit when something has gone wrong, and be prepared to make it right. When you're presenting the problem to your client, make sure you also present some suggestions to fix it.
3. Debrief your disasters. Once you're safely on the other side of the issue, pinpoint where, why, and how it happened – then document (and share!) your learnings so the whole team can grow from it.



**So what does  
it all mean?**





Every brilliant, big-name agency you've ever heard about has had a project that has gone up in flames (maybe even literally, if we're talking absolute worst-case scenarios).

And that's okay.

Projects are tricky, changeable, often unpredictable, occasionally flammable things. As an agency, your team will do everything it can to lock down the variables and ensure reliable, measurable success for your clients – but even still, things won't always go according to plan. After all, as the famous adage goes: even the best laid projects of mice and men often go awry.

So what were the most important things we learned from talking to agencies who have been there, done that?

Here's what we think it all comes down to:

### **1. It all comes back to communication...**

Almost everything can be solved (and if not solved, certainly improved) with open, honest, and upfront communication. Talk to your clients; talk to your teammates; talk to your stakeholders.

### **2. ...but you also need to tailor it to the people you're working with.**

There's an art to balancing the right levels of communication with the right people. It comes down to a few factors: role, responsibility, and good ol' individual preferences. (Try using the RACI model to map it all out.) It might take some trial and error, but when you get it right, you'll be golden. (And regardless, the #1 communication rule above still stands: be open and honest, no matter who you're talking to, or how often.)





### **3. Put in the groundwork at the start of your project.**

You might be dying to just dive into a new project head-first, but taking the time to really sync up with your clients at the outset will not only ensure that you're both on the same page regarding expectations and deliverables – it also helps you to safeguard your project from countless issues (like timeline shifts, budget uncertainties, and scope creep) down the line. Document your plan of action at the beginning, and use that document as your shared North Star to keep you and your clients on track and aligned throughout.

### **4. The right tools help, but they don't do the work for you.**

Software doesn't do the work for you. But it can help you to do it better. Use flexible tools to complement your processes, not dictate them – so you can manage your projects, deadlines, and communications the way that works best for you and your clients.



**Thank you to  
our agency expert  
contributors!**



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