

TAKE FLIGHT COLLABOSPHERE

AGENCY TRACK

CLIENT WRANGLING 101
DARREN TARLOW + KATIE GASTON



Agenda



- The types of clients you deal with
- Change management strategies for various client/personality types
- Client type specific SocialBridge configurations



Class
First class

Departure
Santa Monica

Arrival
Cloud 9



IN THERAPY



#CENTRALDESKTOP



Jon



The first step is admitting you have a problem

The Bully

Likes to berate and exhibit complete control over agency staff and their lives



Micromanager

Mm, yeah...you can't get a single thing done without their fingerprints all over it



ROYAL PAINS

here comes
Honey
Boo Boo



#CENTRALDESKTOP



Michelle



Are you always such a
pain in the ***?

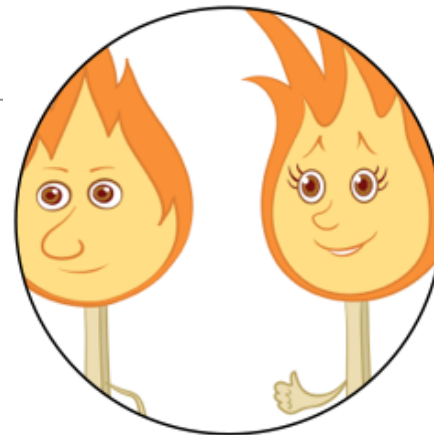
Father Time

“How many hours did that
take?” Your work and process
are only seen through this lens



The Arsonist

There's always a
Friday at 5pm fire drill
just a phone call away



TEETH PULLING



#CENTRALDESKTOP



Victor



I'd rather be at the dentist right now

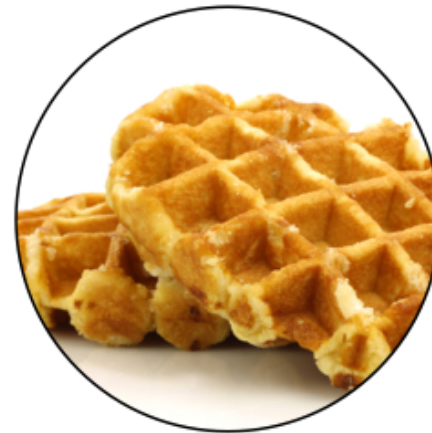
Ghost

Here today, gone tomorrow
– this client can be impossible
to reach, yet expects the world

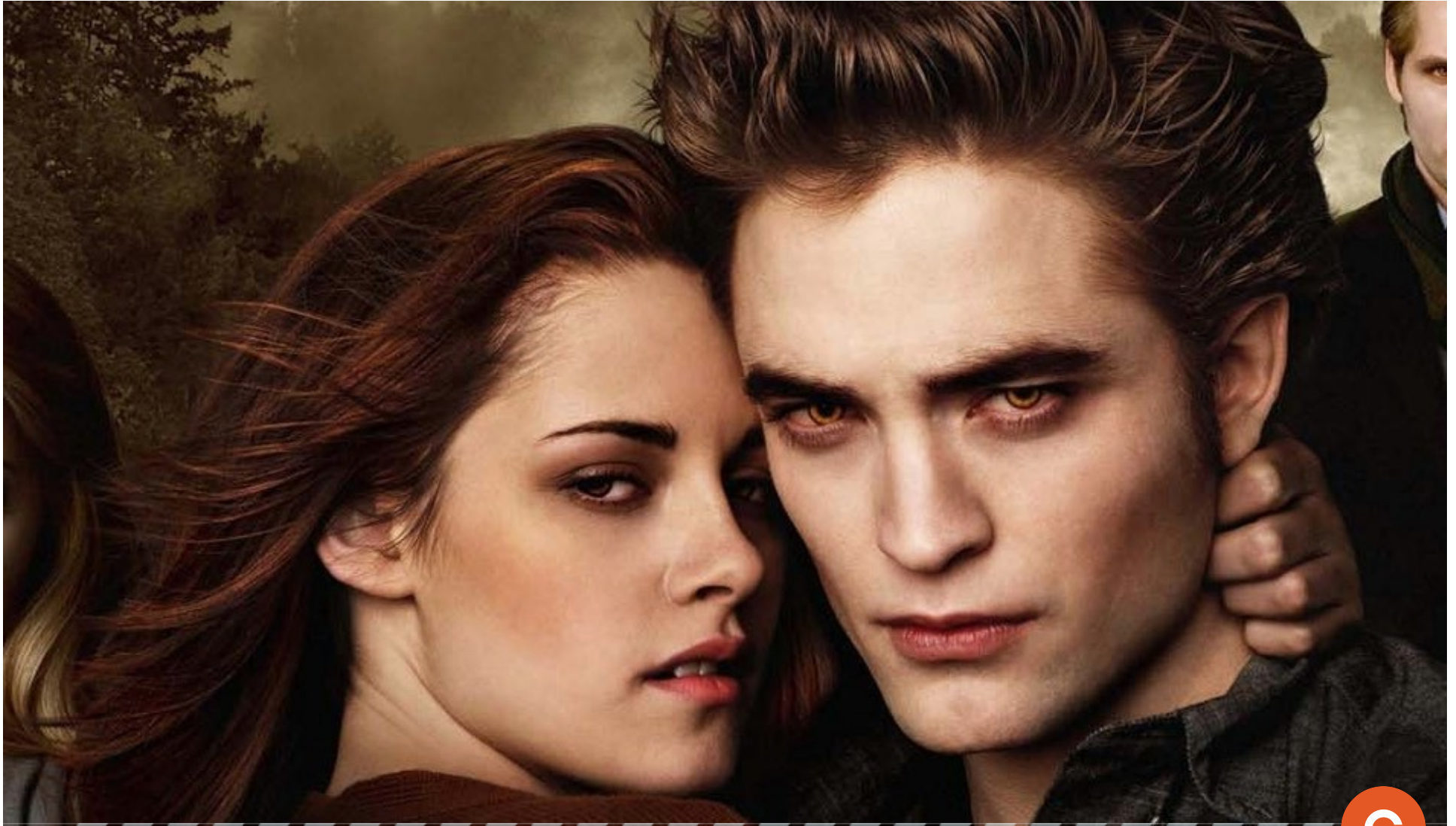


The Waffler

Wishy-washy whichever
way the wind blows, they
want you to show them
what they're looking for



SOULMATES



#CENTRALDESKTOP



Stephanie



Stuck on you... I've got this feeling deep down ...



Soulmate

A true partner – you have ups and downs, but ultimately “get” each other



The Unicorn

A mystical creature, rarely seen in the wild – if you have this client, keep them at any cost



The big picture

No client is an island

You will encounter clients along your way that are a beautiful amalgamation of all the types we've just discussed...

- The Bully
- Micromanager
- Father Time
- The Arsonist
- Ghost
- The Waffler
- Soulmate
- The Unicorn



CHANGE MANAGEMENT 101

“Getting over a painful experience is much like crossing monkey bars. You have to **let go** at some point in order to **move forward**.”

- C.S. Lewis



What is change management?

“**Change management** is a structured approach to shifting and **transitioning** individuals, teams, and organizations from a **current state** to a **desired future state**.”

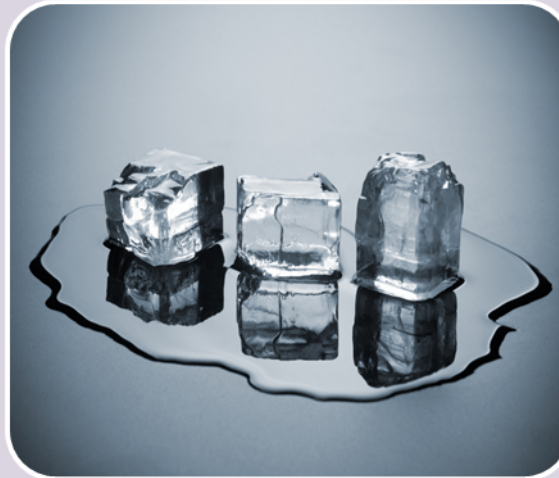


3-stage change: unfreeze and freeze

Kurt Lewin, 'Founder of Social Psychology' 3-Stage Model of Change, 1951



unfreeze



change



refreeze



3-stage change: unfreeze and freeze

[UNFREEZE]

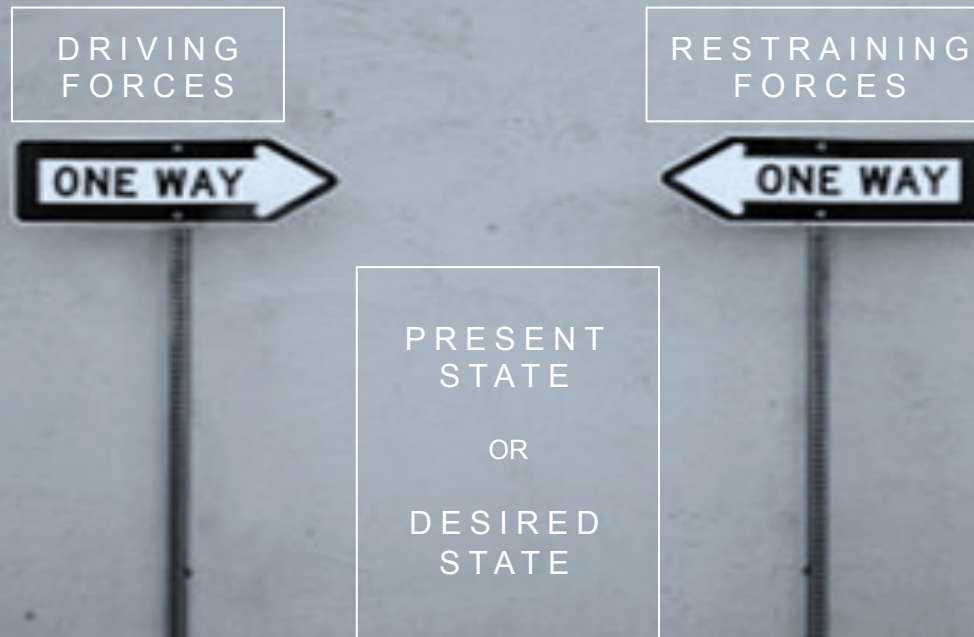


“The first stage is about **preparing ourselves**, or others, before the change and ideally creative a situation in which we **want the change.**”



3-stage change: unfreeze and freeze

FORCE FIELD ANALYSIS



3-stage change: unfreeze and freeze

“Also called the “**transition**” stage, the second stage is central to identifying new behaviors, communicating these and, ultimately, **adopting a new attitude and culture.**”

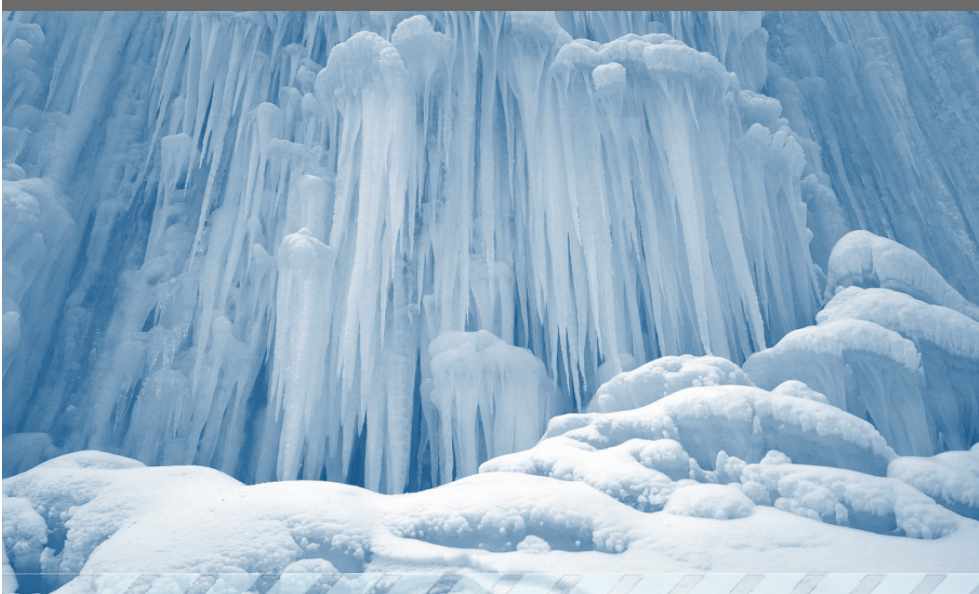
[CHANGE]



3-stage change: unfreeze and freeze

[FREEZE]

“The final stage is about the process of reaching a level of **internal stability** in which changes mold into daily **routine**.”



CHANGE MANAGEMENT STRATEGIES

“Change is inevitable - except from a vending machine.”

- Robert C. Gallagher



CHANGE



[UNFREEZE]



3-stage strategies: first steps



[CHANGE]

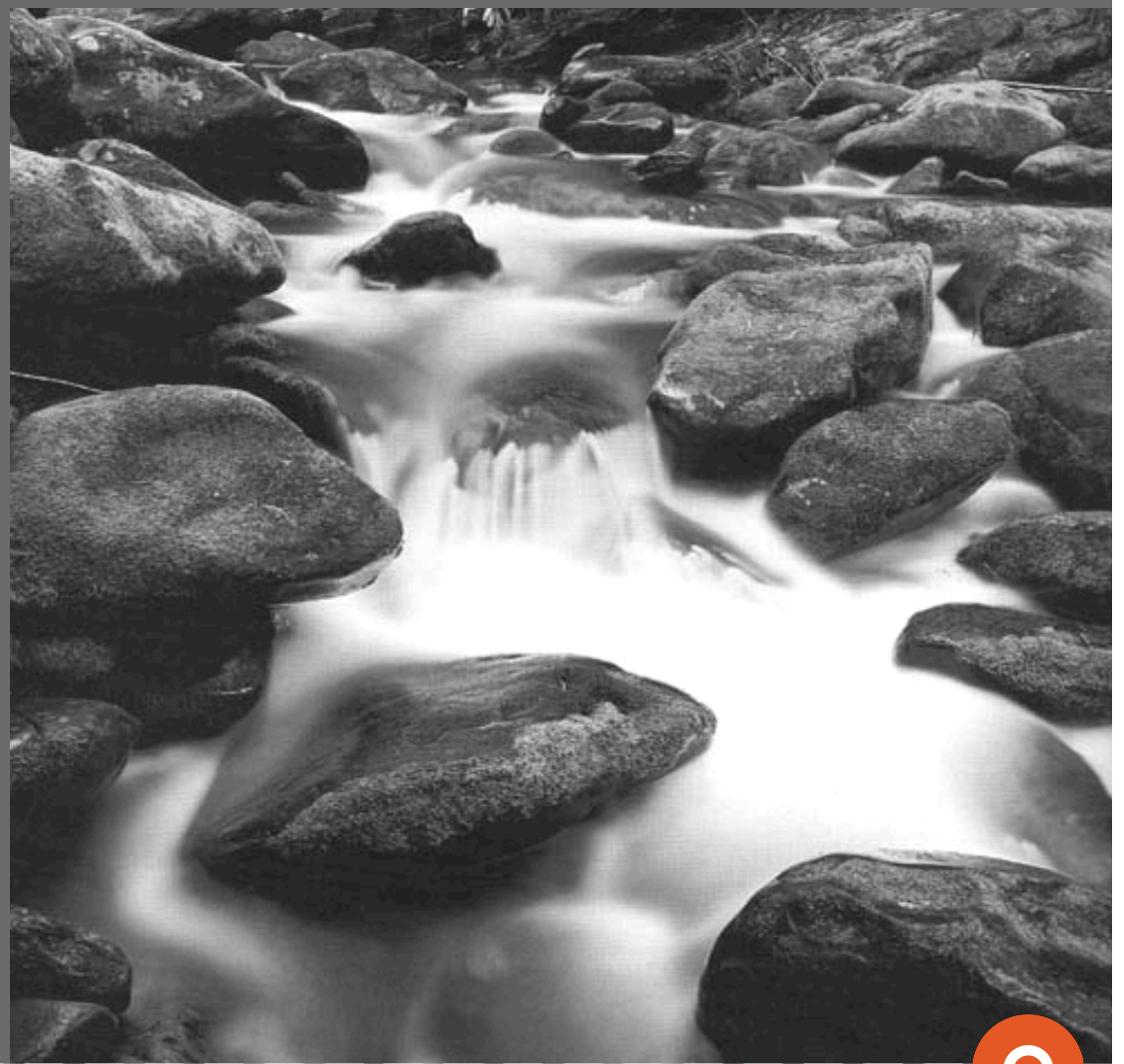


#CENTRALDESKTOP



3-stage strategies: evidence stream

[FREEZE]



CLIENT PORTALS AND MORE...

“SocialBridge provides a platform to improve client communication in a seamless fashion. You can turn bullies into unicorns.”

- Us



IN THERAPY

Strike the right balance
of contact and information

Detailed records are key
to defusing disagreements
over scope or creative

Insulate your creatives
from any overbearing
personalities or opinions



In-Therapy Home

Options ▾

Quick Links

[Ask a Question](#)
[Request a Meeting](#)
[Project Status](#)




Teeth Pulling People

- ☐ 😊✅ Chris Goodrich
☐ 😊✅ Katie Gaston
☐ 😊✅ Keir Serrie
☐ 😊✅ Michael Jones

Email

Skype

Milestones and Tasks

Milestone/Task	Owner	Start Date	Due Date	Status
 CHG-1234	Michael Jones	9/17/12	9/17/13	Pending
Project Briefing (100% complete)				
Creative Reveiw (75% complete)				
Final Edits (75% complete)				
 CHG-1235		9/17/13	9/17/13	Pending
Project Briefing (0% complete)				
Creative Review (0% complete)				
 Tasklists w/o Milestones				
Inbox (0% complete)				

Project Discussions

[New Discussion](#)

Ondi Smith

CHG-1234: Banner Advertisement

Client has prepared project specs for November run of soda campaign.

Sep 17



Brad Garrett











CHG-1235: Email Blast

Request for template design has been submitted. Please review by 10/1/12.

Sep 17

Calendar

[+ Add Event](#)

 Daily Update	Tue, September 25 1:00pm - 2:00pm
 Daily Update	Wed, September 26, 1:00pm - 2:00pm
 Daily Update	Thu, September 27, 1:00pm - 2:00pm
 Daily Update	Fri, September 28, 1:00pm - 2:00pm
 Keynote Presentation	Mon, October 1, 8:00am - 9:00am
 Daily Update	Mon, October 1, 1:00pm - 2:00pm
 Daily Update	Tue, October 2, 1:00pm - 2:00pm
 Daily Update	Wed, October 3, 1:00pm - 2:00pm
 Daily Update	Thu, October 4, 1:00pm - 2:00pm
 Daily Update	Fri, October 5, 1:00pm - 2:00pm

Recent Activity

Yesterday

- ✅ Updated Status Modified by Michael Jones 19 hours ago in In-Therapy
- ✅ Updated Status Modified by Michael Jones 19 hours ago in In-Therapy
- ✅ Completed Project Modified by Michael Jones 19 hours ago in In-Therapy
- ✅ Reviewed Creative Modified by Michael Jones 19 hours ago in In-Therapy





Last Week

- ✅ Updated Status Added by Michael Jones Sep 18 in In-Therapy
- ✅ Completed Project Added by Michael Jones Sep 18 in In-Therapy
- ✅ Submitted Brief Modified by Michael Jones Sep 18 in In-Therapy

Quick Links

Ask a Question
Request a Meeting
Project Status

Teeth Pulling People

- ☐  Chris Goodrich
☐  Katie Gaston
☐  Keir Serrie
☐  Michael Jones

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Creative Review (0% complete)				
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Creative Reveiw (75% complete)

Final Edits (75% complete)

 CHG-1235		9/17/13	9/17/13	Pending
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Project Briefing (0% complete)

Creative Review (0% complete)

 **Tasklists w/o Milestones**

Inbox (0% complete)

Calendar

+ Add Event

Daily Update

Tue, September 25 1:00pm - 2:00pm

6, 1:00pm - 2:00pm
7, 1:00pm - 2:00pm
8, 1:00pm - 2:00pm
1, 8:00am - 9:00am
1, 1:00pm - 2:00pm
2, 1:00pm - 2:00pm
3, 1:00pm - 2:00pm
4, 1:00pm - 2:00pm
5, 1:00pm - 2:00pm




19 hours ago in In-
19 hours ago in In-
19 hours ago in In-
19 hours ago in In-

- ✓ Updated Status Added by Michael Jones Sep 18 in In-Therapy
- ✓ Completed Project Added by Michael Jones Sep 18 in In-Therapy
- ✓ Submitted Brief Modified by Michael Jones Sep 18 in In-Therapy

Quick Links

Ask a Question
Request a Meeting
Project Status

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- ☐  Chris Goodrich
☐  Katie Gaston
☐  Keir Serrie
☐  Michael Jones

Email

Skype

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+ Add Event

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- pleted Added by Michael Jones Sep 18 in In-Therapy
- ct
- mitted Modified by Michael Jones Sep 18 in In-Therapy
- Brief



janedoe@internets.com Sign Out at Katies Sandbox ▾

Workspaces ▾ My Dashboard ▾ Favorites ▾

Quick Links

Ask a Question

Milestones and Tasks

Milestone/Task	Owner	Start Date	Due Date	Status
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Calendar

+ Add Event

Daily Update

Tue. September 25 1:00pm - 2:00pm

Project Management ▾

Calendar

Discussions

Internal Notes

Internal Notes ▾

 Internal use only

Name

Status

Modified ▾

 **Project Brief Notes**

Approved

Katie Gaston,


Project Brief Notes

 **Client Notes 10/6/2012** 

Approved

Katie Gaston,

Client Notes 10/6/2012

 Items not in Folders

Garrett

Project therapy

Creative Therapy

Last Week

- ✓ Updated Status Added by Michael Jones Sep 18 in In-Therapy
- ✓ Completed Project Added by Michael Jones Sep 18 in In-Therapy
- ✓ Submitted Brief Modified by Michael Jones Sep 18 in In-Therapy

 #CENTRALDESKTOP



Page 4

Music to your ears. And your wallet.

2 ~~Yaris has everything you need to enjoy your drive.~~ It comes standard with an AM/FM CD player, an auxiliary audio jack and a USB port with iPod™ connectivity. Yaris also offers an available system that is SiriusXM Satellite Radio™ compatible and features HD Radio™, an iPod™ interface, music streaming via Bluetooth™ wireless technology, and steering wheel-mounted audio controls. More than you expected to hear, right? Probably for a lot less than you expected to spend too.



US-YA12-5-A

Equipped with the key features and highlights you see every day, Yaris is in tune with you and your active, high-tech lifestyle.



US-YA12-6-A

Let your fingers do the rocking. The available steering wheel-mounted audio controls give you total command of your driving soundtrack while helping you pay attention to the road ahead.

Listen, for less. The audio system that comes standard on Yaris L offers four speakers, an auxiliary audio jack and a USB port with iPod™ connectivity.



US-YA12-7-A

Standard on Yaris LE and SE, the audio system is SiriusXM Satellite Radio™ compatible and offers hard-disk audio enhancement, six speakers, HD Radio™, an auxiliary audio jack, a USB port with iPod™ connectivity, and hands-free phone capability, phonebook access and music streaming via Bluetooth™ wireless technology and iPod™ interface.



US-YA12-8-A



US-YA12-9-A

5-Speed SE Manual shown in Dark Gray.

2. Success Start

[REPLACE WITH]

Yaris has everything you need to enjoy your experience within a vehicle.

27 Jul 2012 21:43

page 4

ROYAL PAINS

Clearly set expectations and leverage tools that show effects of deviations

Real-time scope creep is inevitable, centralize all commentary to do job right

Detailed records will be on post-mortem conversations

Royal Pains

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Royal Pains Home


Options









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[Project Images](#)
Reports
[Request Project Update](#)
[Request Time Spent](#)
[Request Contract Update](#)
Project Request

Project Name ▲	Job Number	Due Date	Status
Lift Routines	CD-01	Sep 21, 2012	In Progress
Bicep Ads	CD-02	Sep 24, 2012	Not Started
Weight Org.	CD-03	Sep 26, 2012	In Progress

Recent Activity
Last Week

W Status	Modified by Michael Jones 19 hours ago in Royal Pains
W FrontPage	Modified by Katie Gaston 19 hours ago in Royal Pains
W Clients	Modified by Michael Jones 19 hours ago in Royal Pains
 Project Contracts	Modified by Keir Serrie 19 hours ago in Royal Pains

[More...](#)
Royal Pains People
 Add Team Members

Name	Department	Title	Email	Phone
C				
 Chris Goodrich	Product	Product Manager	cgoodrich@centraldesktop.com	714-234-1244 or x313 
K				
 Katie Gaston	Client Services	Operations Lead	kgaston@centraldesktop.com	714-234-1244 or x313 
 Keir Serrie	Product	UI/UX Designer	kserrie@centraldesktop.com	714-234-1244 or x313 
M				
 Michael Jones	Product Support	Product Support Rep	mjones@centraldesktop.com	714-234-1244 or x313 

Project Contracts

Project Title	Date
Machine Reorganization	Sep 17, 2012
Social Ad Campaign Q3	Sep 19, 2012
Website Redesign	Sep 27, 2012
Revamped Logo	Sep 26, 2012
Halloween Workshops	Oct 31, 2012
Winter Training Camp	Dec 1, 2012



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[Project Contracts](#)
[Project Images](#)

Reports

[Request Project Update](#)
[Request Time Spent](#)
[Request Contract Update](#)

Project Request

Project Name ▲	Job Number	D
Lift Routines	CD-01	S

Bicep Ads	CD-02	S
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Weight Org.	CD-03	S
-------------	-------	---

Recent Activity**Last Week**

W Status	Modified ago in F
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W FrontPage	Modified in Royal
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W Clients	Modified ago in F
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 Project Contracts	Modified Royal P
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Royal Pains People[Add Team Members](#)

ent Title	Email	Phone
-----------	-------	-------

Product Manager	cgoodrich@centraldesktop.com	714-234-1244 or x313
-----------------	------------------------------	----------------------

Operations Lead	kgaston@centraldesktop.com	714-234-1244 or x313
-----------------	----------------------------	----------------------

UI/UX Designer	kserrie@centraldesktop.com	714-234-1244 or x313
----------------	----------------------------	----------------------

Product Support Rep	mjones@centraldesktop.com	714-234-1244 or x313
---------------------	---------------------------	----------------------

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[Project Contracts](#)
[Project Images](#)

Reports

[Request Project Update](#)
[Request Time Spent](#)
[Request Contract Update](#)

Date

Sep 17, 2012

Sep 19, 2012

Sep 27, 2012

Sep 26, 2012

Oct 31, 2012

Winter Training Camp

Dec 1, 2012



Quick Links[Request New Project](#)
[Upload New File](#)
[Find a Project](#)**Files**[Project Contracts](#)
[Project Images](#)**Reports**[Request Project](#)
[Request Time](#)
[Request Contract](#)**Project Request**

Project	Job	Due Date	Status
---------	-----	----------	--------

Royal Pains People[Add Team Members](#)

Name	Department	Title	Email	Phone
------	------------	-------	-------	-------

Project Contracts









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Machine Reorganization	Sep 17, 2012
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Revamped Logo	Sep 26, 2012
Halloween Workshops	Oct 31, 2012
Winter Training Camp	Dec 1, 2012

 Project Contracts Modified by Keir Serrie 19 hours ago in Royal Pains

[More...](#)

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Project Request
Royal Pains People
 [Add Team Members](#)
Royal Pains People
 [Add Team Members](#)

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 Keir Serrie	Product	UI/UX Designer	kserrie@centraldesktop.com	714-234-1244 or x313 
M				
 Michael Jones	Product Support	Product Support Rep	mjones@centraldesktop.com	714-234-1244 or x313 

Phone

714-234-1244 or x313 

714-234-1244 or x313 

714-234-1244 or x313 

714-234-1244 or x313 
[Halloween Workshops](#)

Oct 31, 2012

[Winter Training Camp](#)

Dec 1, 2012





Workspaces ▾ My Dashboard ▾ Favorites ▾

Request New Project
Upload New Project
Find a Project **Katie**

Project C
Project I

Request

 Add Team Members

Katies Sandbox Digest via Central Desktop [noreply@centraldesktop.com]

Sent: Sat 8/11/2012 2:15 AM

To: kqaston@centraldesktop.com

Overdue Tasks & Milestones

- ✓ [Sample Project Space] Contact Jun 11, 2012 on their Website Needs - in Coca-Cola - Fanta 008564sjd
6 Days Late
-
- ✓ [Sample Project Space] Contact Jul 17, 2012 on their Website Needs - in Coca-Cola - Fanta 008564sjd
4 Days Late

Coca-Cola - Fanta 008564sjd - Katies Sandbox - Recent Workspace Activity in the past 1 day

- ✓ Client Complete Needs Analysis
modified by Katie Gaston at 9:25am

To remove yourself or change the frequency of your Workspace Notification Settings [Click Here](#).

More...

Revamped Logo

Sep 20, 2012

Halloween Workshops

Oct 31, 2012

Winter Training Camp

Dec 1, 2012



#CENTRALDESKTOP

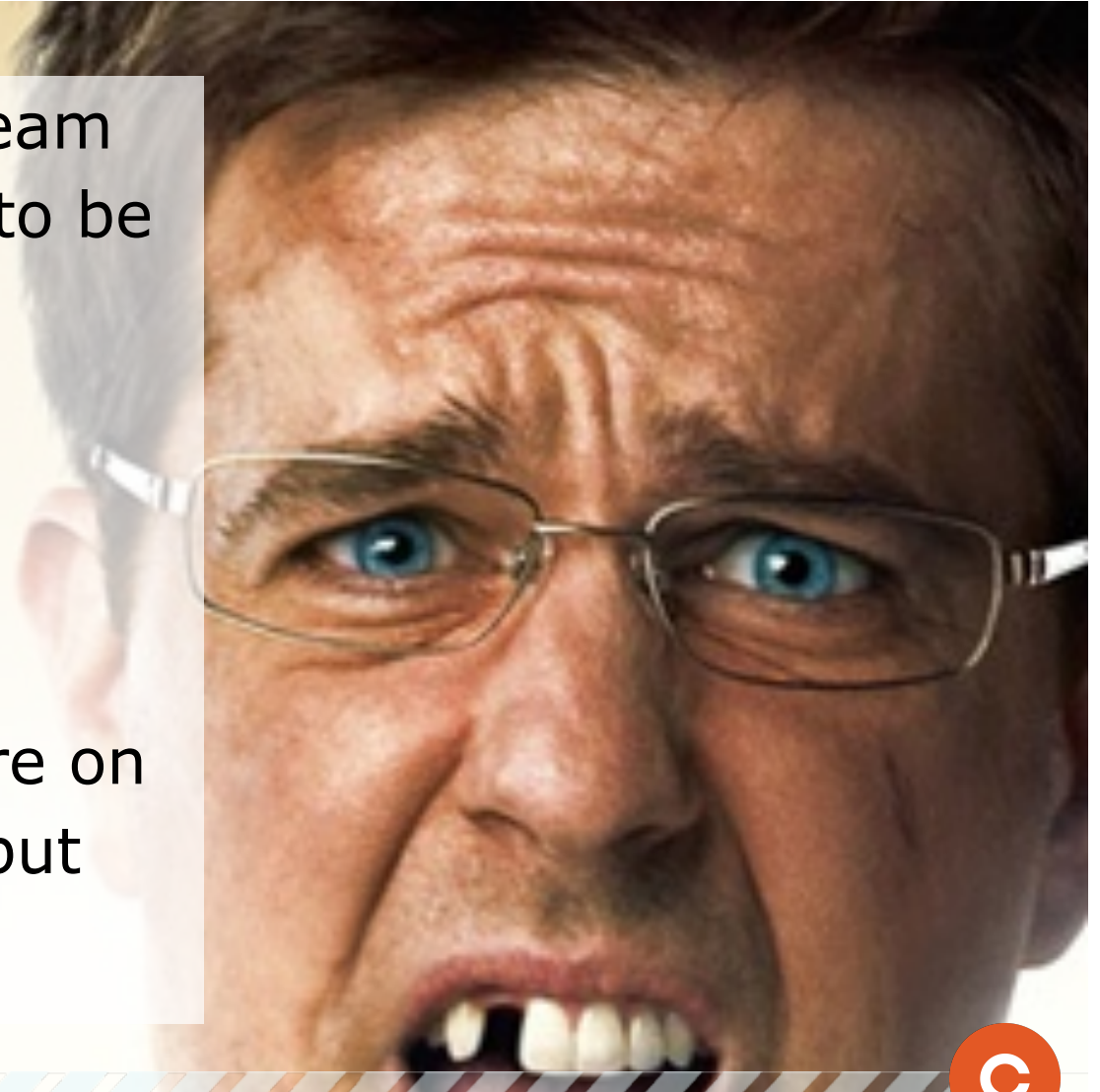


TEETH PULLING

Maintain a steady stream of digestible updates to be quickly referenced

Provide a balance of comparative options

Impose some structure on their schedules for input and meetings



Teeth Pulling

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Projects

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[Recently Requested Archived Jobs](#)

Projects

Milestone/Task ▲	Owner	Start Date	Due Date	Status
Braces Push	Bob Clark	9/14/12	10/17/12	Pending
Whitener Ad	Katie Gaston	9/23/12	10/11/12	Pending
Dentist Campaign	Michael Jones	9/17/12	10/3/12	Pending
Social Outline	Keir Serrie	8/18/12	9/23/12	Pending
Web Presence	Katie Gaston	8/17/12	9/29/12	Pending

Task List: Whitener Ad

[Go to Task List](#)

Creative	Added by Katie Gaston Sept 17	More...
Review	Added by Michael Jones Sept 23	More...
Client	Added by Keir Serrie Sept 24	More...
Finalize	Added by Michael Jones Sept 12	More...

Recent Proofs

[Go to Folder](#)

	Tooth Pulling Flow	Added by Michael Jones Sept 25 2:34pm
	Brace Organization	Added by Bob Clark Sept 23 2:29pm
	Social Content	Added by Keir Serrie Sept 23 2:15pm
	Whitener Ad	Added by Katie Gaston Sept 22 2:01pm
	Organization Picks	Added by Michael Jones Sept 17 2:00pm
	Back to Parent Folder	

Teeth Pulling People

- ☐  Chris Goodrich
☐  Katie Gaston
☐  Keir Serrie
☐  Michael Jones

Email

Skype

Recent Discussions

[New Discussion](#)


Jan Suh

Teeth Filling Progress

Sep 14

Please add your opinion on our current Teeth Filling Campaign.



Jon Moriarty

Whitener Ad

Sep 17

What types of media will our target segment be using over the next two months?





Teeth Pulling

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Teeth Pulling People

- ☐ Chris Goodrich
- ☐ Katie Gaston
- ☐ Keir Serrie
- ☐ Michael Jones

Email

Skype

Teeth Pulling People

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Options ▾

Task List: Whitener Ad

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Back to Parent Folder	





Teeth Pulling Home

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Teeth P

- ☐ Keir Serrie
- ☐ Michael Jones

Email

Skype

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[Go to Task List](#)

[More...](#)

[More...](#)

[More...](#)

[More...](#)

☐ [Go to Folder](#)

Sept 25 2:34pm

23 2:29pm

t 23 2:15pm

Sept 22 2:01pm

☐ Organization Picks Added by Michael Jones Sept 17 2:00pm

☐ [Back to Parent Folder](#)





Teeth Pulling

Teeth Pulling Home

Quick Links

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- Organization Picks** Added by [Michael Jones](#) Sept 17 2:00pm
- [Back to Parent Folder](#)



Jon Moriarty

Whitener Ad

What types of media will our target segment be using over the next two months?

Sep 17

- Whitener Ad Added by [Katie Gaston](#) Sept 22 2:01pm
- Organization Picks Added by [Michael Jones](#) Sept 17 2:00pm
- [Back to Parent Folder](#)





38
highway mpg^{1,2}
The efficient Yaris gets an EPA-estimated 38 highway and 30 city mpg rating.¹

prices.
ent MacPherson strut front suspension and Double Overhead Cam
ve Timing with intelligence (VVT-i), the nimble Yaris offers downright
ve see it, its EPA-estimated 38 highway mpg rating actually adds to
worry about gas stations slowing you down.

Fast? It outpaces fuel prices.
With its wide wheelbase, independent MacPherson strut front suspension and Double Overhead Cam (DOHC) engine featuring Variable Valve Timing with intelligence (VVT-i), the nimble Yaris offers downright spirited performance. And the way we see it, its EPA-estimated 38 highway mpg rating actually adds to the fun. After all, you won't have to worry about gas stations slowing you down.

1. See footnote 2 in Disclaimers section. 2. Manual transmission only.

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SOULMATES

Encourage collaborative discussions around ideas and campaigns

Use status updates and other low touch automated features to “K.I.T.” and avoid complacency



Soulmates Home

Options ▾

Quick Links

[Start New Discussion](#)
[Request New Project](#)
[Schedule Meeting](#)

Project Overview

[Find a Project](#)
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[Archived Jobs](#)

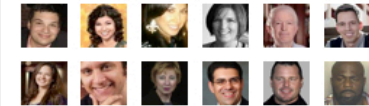
Project Request

Project Name	Job Number	Due Date	Status
Usher Campaign 2012	CD-001	Sep 21, 2012	In progress
Coldplay Campaign 2012	CD-002	Sep 24, 2012	Awaiting Review
Mumford & Sons Campaign 2012	CD-003	Sep 26, 2012	In progress

September 2012

Tue	Wed	Thu	Fri	Sat
25 TODAY	26	27	28	29
1:00 PM Daily Update	1:00 PM Daily Update	1:00 PM Daily Update	1:00 PM Daily Update	

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Tad Burns

Need Your Thoughts :)
We have finalized creative for the Usher Campaign.

Sep 17



Sandi Leo

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Let's all get lunch after our meeting.

Sep 12



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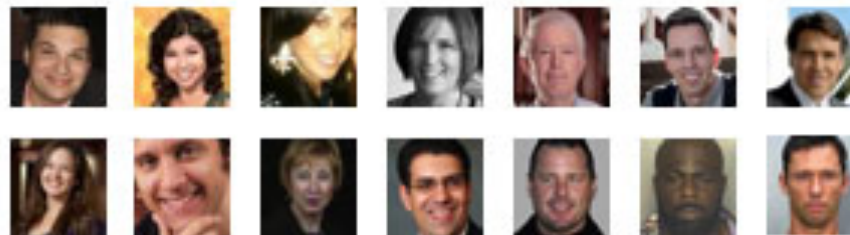
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THANK YOU FOR
FLYING WITH US.

GET READY FOR
YOUR NEXT
ADVENTURE



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