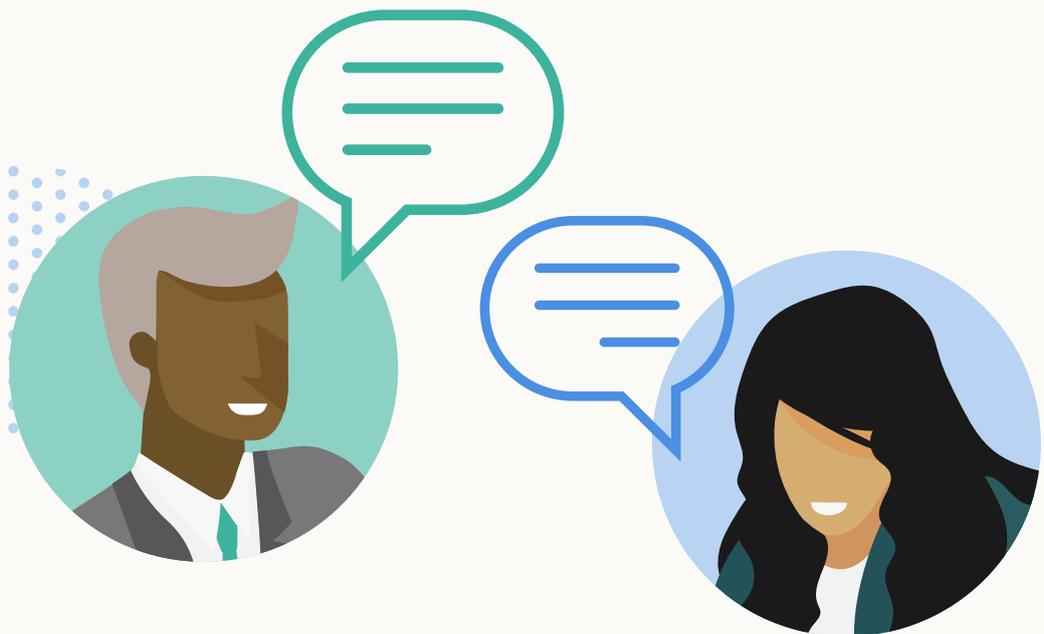


# The Agency Owners Guide to **Team Communication**

Welcome to the Agency Owners Guide to Team Communication. This guide is packed with advice and chances for self-evaluation to help you improve your agency's internal and external communication strategy.

# Communication Matters

Communication is at the heart of everything your business does. It's how you speak to clients, how you address staff and how staff members speak to each other. Miscommunication is your enemy because it wastes time and harms client relationships. Tasks fall between the cracks and vital deadlines are missed.



You might not even realise that your business is bad at communicating, but there are some telltale signs. Endless email chains and soul-destroying meetings that seem to have no purpose are two of the biggest you should look out for, but we'll cover them in greater detail later on.

The CircleLoop team used to be a part of the corporate world, so we know how frustrating it can be when you have back-to-back meetings throughout the day, stopping you from getting any actual work done.

That's not to say we don't host meetings too. It's about knowing when a meeting is unnecessary and which communication tools to use instead. This allows you to be as efficient and productive as possible. When should you pick up the phone, send an email or just speak to someone?

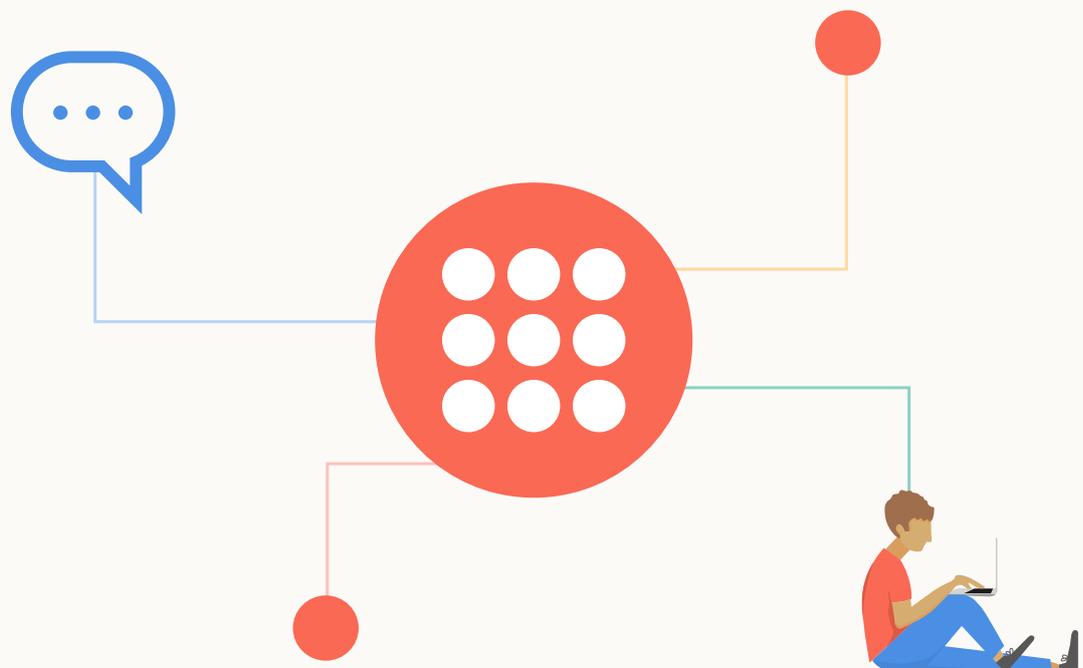
Communication and company culture go hand in hand and this guide will outline how to go about developing a culture, if that's something you haven't thought about before. It'll also outline some tips for communicating with clients and the best apps and strategies you can adopt right now.

Each section ends with a task for you to do. We understand that doesn't sound like a lot of fun, but each task is designed to get you to assess your own agency through a new set of eyes.

Just because you've always done something a certain way, it doesn't mean it's right. Complete the tasks and consider how your own agency might be going wrong when it comes to communication. **Let's get started.**

# Internal Comms and Culture

You need to find the right balance of communication that will help your organisation to grow, but also allow staff to be as productive as possible. Here's how to find that balance.



There's been a shift towards creating the right kind of company culture for startups in recent years. More than ever, employers are looking for staff that align with the company's values. This improves the chances of a new starter being a good fit and creating teams that work well together.

Deciding to have a clearly-defined company culture is a good start, but implementing and embracing it is more challenging. An easy place to start is by practising what you preach. It starts at the top with you. Lead by example and those further down the chain will adopt the same approach.

Once you've established what's important to your company and guidelines that make up your culture, you can incorporate them into your communication strategy. For example, a key component of your culture might be to show passion about what you do.



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Passion like this can be infectious and if you show them how it's done, you can quickly boost staff engagement. Create a space for teams to develop these passions, like a specific channel on an instant messaging app, and you'll help to cultivate a culture of ideas and innovation.

The last thing you want is a silent, traditional office space that staff members hate. Offices like these kill creativity and conversations, making it harder to generate ideas and growth. An instant messaging app, like Slack, is perfect for today's impatient workforce. Emails are too slow when ideas are being formed.

A good way of establishing how staff should use internal communication tools is by creating a hierarchy. Decide the process that staff should follow when they need to speak to a colleague. For example, the most effective choice is still to just have a verbal conversation. This could be followed by an instant messaging app, a project management tool and finally email.

You can outline which tool should be used for which purpose. If you're discussing the next work's outing, a channel on Slack is fine. If it's the agenda for a client meeting, it should be through emails, and so on.



Here are some quick do's and don'ts to make sure you've created the right internal communication strategy for your business.

### ✓ Do

- Encourage conversation! It helps to improve staff relationships and encourages staff to offer ideas.
- Invest in different communication tools. We'll cover which are our favourites a little later on.

### ✗ Don't

- Restrict staff communication to just emails. No one wants a cluttered inbox
- Hold unnecessary meetings.

## Task

Take some time to determine what your agency's communications process and culture currently is and what you eventually hope it will be. It isn't a quick task and it's important that you give your team the opportunity to share their thoughts. They might have completely different ideas to you, so avoid influencing them.

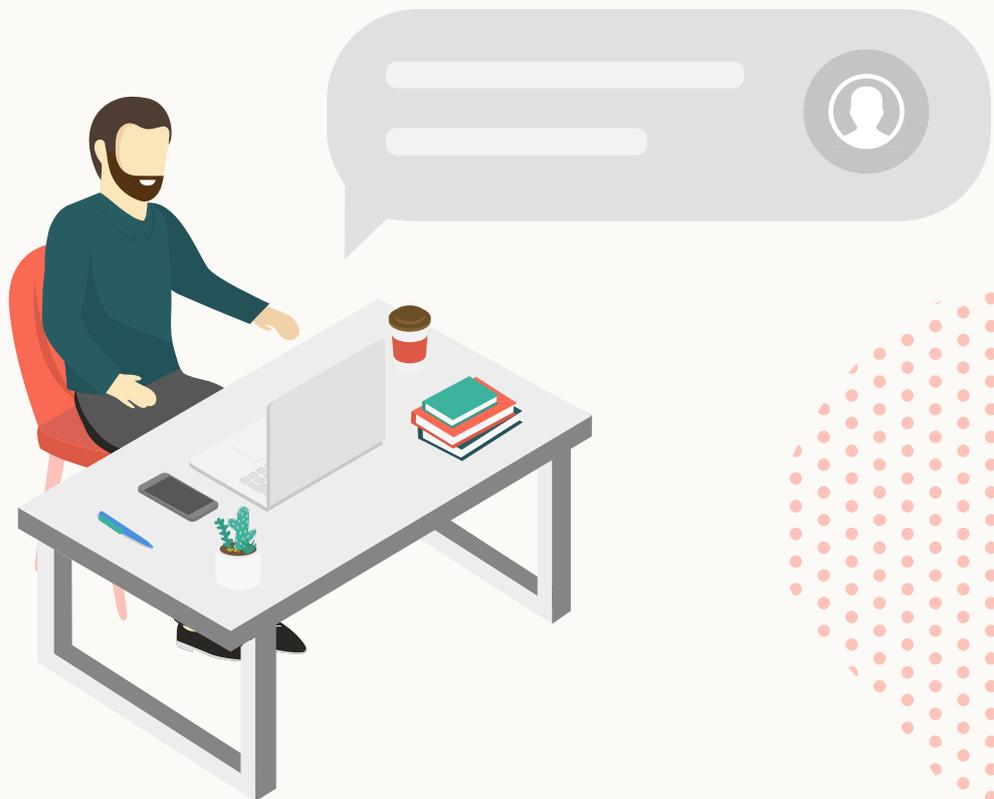
Leave the questions as open as possible to get the most authentic results. Then, analyse the findings to establish key values that your company believes in.

### Example Survey Questions:

1. Describe our company's culture in a sentence.
2. Describe how you think we should communicate in a sentence.

# Communicating with Clients

Whatever the method, whether it's a phone call or an email, you have to find the most effective way of communicating with clients to make sure you get what you want.



Communication is the foundation of any client relationship. Failure to communicate effectively leads to disagreements and complications. What can start as a tiny mistake or problem can be the start of a negative journey towards you both parting ways.

It can be one email or phone conversation that ruins all the hard work your agency has done to bring them in as a client. This is why it's vital that your whole organisation knows how to communicate in the right way.

Many of the key points, like being polite and professional are obvious, so we won't bore you with those. But, what we will say, is remember that common sense isn't that common. So keep an eye out.

We'll focus on external communication strategies that are often forgotten or not really considered by some burgeoning agencies.



## 24-Hour Rule

Make sure client emails and calls are responded to within 24 hours. This is a basic strategy but it shows clients that you're committed to their success and you value their business. The 24 hour rule can also be applied to clients that are being difficult. If an email has really wound you up, then it can be worth waiting 24 hours before responding. You don't want to send something you'd later regret.

## Call Agendas

There's nothing worse than a phone call that wastes everyone's time. Nothing is sorted, no one really says anything and all that's decided is that you'll have another phone call same time next week. Create a call agenda for each regular phone call that you have with clients (e.g. report calls). Establish clear goals of what you need to achieve and stick to them on the call. If you find that you can't think of anything to put on the agenda, cancel the call.

## Make a Video

Trying to give clients a tutorial can be incredibly frustrating. They insist they're doing what you tell them to but they insist it isn't working. Make everything a little clearer by creating videos to give to new clients. It shows that your agency is professional and creative, while also ensuring the client has the information they need.

## ✉ Minimum Communication

Every client is different but the easiest way to irritate a client is by bombarding them with emails, calls and reports. Although the sales team might have only sent them one email today, if every team has done the same, then it soon adds up. Communicate internally and collaborate on emails and reports so that clients only receive one email.

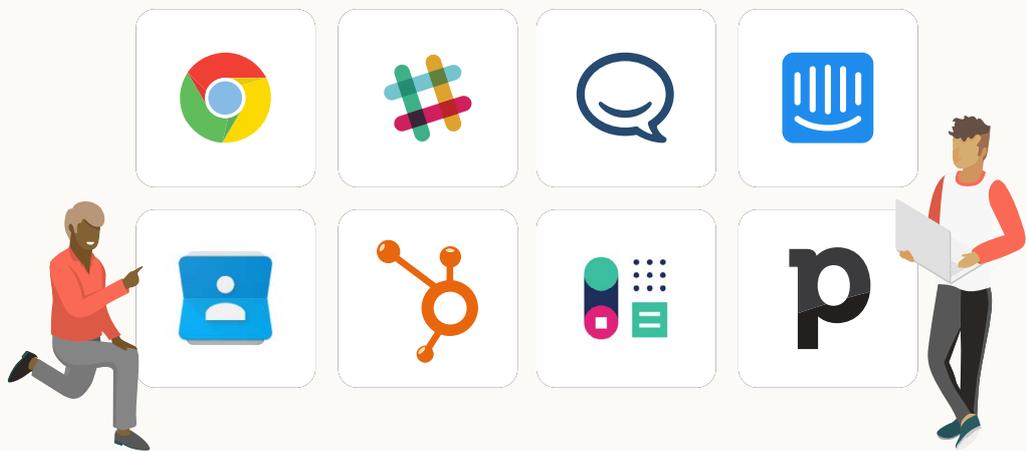
## Task

Create a call agenda template for all staff members to use when on client calls. Once you have them on each call, you'll wonder how you ever lived without them. They keep everyone on topic and make sure no time is wasted. Each business is different, but there are some key sections to include in the template. Here are some of the most important:

- Date.
- Time.
- Attendees.
- Meeting Purpose/Desired Outcome.
- Any Required Preparation.
- Actionable Items from any Previous Calls (and Progress Status).
- Agenda Topic (including who is raising the issue and how long should be spent on it).
- New Actions Arising.

# Rolling out the Tools and Tech

Team and client communication doesn't have to be complicated. There are all kinds of tools out there that can make your life easier. Here are the best apps and tools available right now that can improve your agency's communication.



# Improving Internal Comms and Culture

## Slack

There's a reason Slack is one of the most widely used internal communications tool out there, despite its relative infancy. There's now around eight million active users that benefit from Slack's simplicity, efficiency and versatility. It's designed specifically for helping smaller businesses and startups to communicate internally.

At the other end of the scale, NASA used Slack for their Mars Curiosity Rover Project, which tells you everything you need to know about how highly regarded it is. There's a wide range of in-built tools and modules that you can use and it's perfect for remote workers that need to check in with head office.

## Scrums

No, we aren't suggesting you lock arms with the rest of your colleagues before butting heads with the marketing department. A scrum is a kind of meeting where everyone puts their heads together (see how they got their name?) to discuss anything from the day's plans to major company updates. They're intended to be no longer than 15 minutes which keeps discussions on-topic but brief, allowing everyone to get to work having checked in with each other.

## Mini Goals and Frequent Feedback

Make frequent feedback a part of your company culture. Giving staff clear goals to aim for and regular feedback helps to make them accountable for their work. They'll take pride in what they do and want it to be as successful as possible. Giving feedback can be a little awkward, especially as you try to find the right way of offering constructive criticism.

## Communicating with Clients

### Call Training

Everyone in the office should be able to speak on the phone with a client. They should also have no problems setting up conference calls or transferring calls to the right member of staff. Clients won't appreciate being on hold for minutes while someone desperately tries to work out what they have to do next. Imagine ringing a company for the first time and you're placed on hold and connected to the wrong member of staff. You never know how important an incoming phone call could be so it's vital that all staff are professional and give your agency the best possible first impression.

## Call Agenda Templates

As we've already mentioned, it's easy for a client call to go awry without the right planning. Create a call agenda template that can be used throughout your company. All you need to include is the key goal of the call, each important topic that needs to be covered and any questions that other members of the team want to be asked.

## No Long Email Chains

Email chains are banned. They're long-winded, complicated and half the time no one can remember what the initial point of the emails were. Picking up the phone and calling the client takes far less time and allows you to get the information you need quickly and easily. There are phone systems available with all kinds of extra functionality to make your next client call a success.

## Task

It's time to have a full audit of the software and apps your company uses for communication. What are they used for and can a new and improved tool complete the tasks of multiple existing systems? Make sure the whole company is on the same page and uses the same apps for communicating.

You might realise that you can remove software you don't regularly use and save on unnecessary costs, which streamlines your communications process and improves company efficiency.

# Phones Still Matter But You Need the Right System

Despite the rise of instant messaging apps, the traditional phone call isn't going away anytime soon. It's still the best way of contacting a client but you need a phone system that's flexible, easy to use and suited for the modern day worker.



A phone call is great for building a genuine human relationship with the person on the other end of the line. Phones still matter but they shouldn't slow your agency down, they should offer all kinds of extra functionality to increase efficiency and productivity.

Many offices are held back by traditional phone systems and should be looking for an upgrade. This isn't always easy, especially if you're already tied into a lengthy contract with your existing provider.

What's often holding some agencies back from exploring new phone options is they're worried that a new system would be difficult to install and operate. Choosing the right phone system is a task for the whole agency, not just you. Because they'll be the ones using it each day, staff should have an input.

In addition to how your staff work with the phones, you'll also need to think about where your staff work. More and more of us are choosing to skip the morning commute in favour of working from home.

For staff members to work at home, they'll need the right equipment and infrastructure so that clients still think they're answering calls in the office. They'll need a phone system that allows them to have an office number, even when they're working at home or on the go.

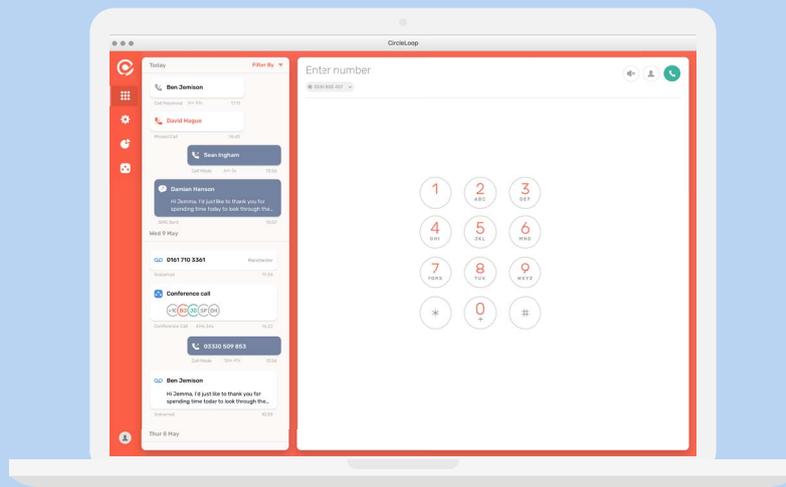
There's no point finding you sourcing a cheaper option if months down the line you're team are still having issues working it effectively. The office phones are a tool to make everyone's life easier, not harder. You should be able to operate them quickly and correctly, making seamless call transfers to keep clients happy.

## Task

Research available phone systems for agencies and find one that suits your evolving needs. You're looking for a solution that's cost-effective, flexible, streamlined and time-efficient. A top-level view of your options are:

1. Traditional landline connections.
2. Internet based desk-phone systems.
3. App-based phone systems.

Consider each options' features and whether or not they're equipped to manage your communications, both now and in the future. Start a free trial to get a feel of how the system would mesh with your agency.



# Discover CircleLoop and Start a Free Trial

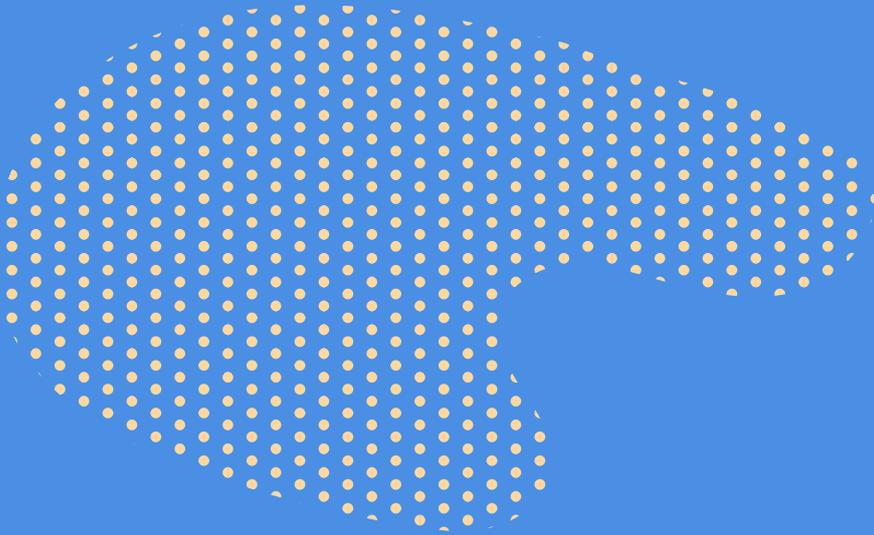
CircleLoop is a business phone system, but not as you know it. Controlled through mobile and desktop apps, CircleLoop is a flexible phone solution that is designed to be used either in the office or on the go.

There are no contracts to tie you down, so if you decide the system isn't for you, there's nothing to stop you from stopping. Setup is instant and doesn't involve the costs associated with traditional alternatives, like installation fees, service plans and hardware.

You don't need to be an expert in phone engineering to setup CircleLoop. No lines or switches need to be installed. All you have to do is add the users and numbers and you're good to go. If you need to make any changes to the numbers, you can do it easily in real-time.

Here are some of the key features you'll have access to if your agency makes the switch to CircleLoop.

- **UK and international numbers** - add local, national and international numbers so that the person calling always uses a number they recognise. Even if a staff member is working from home, their number will show up as the office one.
- **Voicemail to text** - voicemails can be converted to text and sent to your email address.
- **Live activity feed** - manage the full system via the live in-app activity feed. Smart notifications make sure you never miss something important.
- **Compatible with existing hardware** - CircleLoop integrates with your existing USB or Bluetooth headsets, handsets and speakers.
- **Call recording** - store and download phone calls to use later for training purposes.
- **Call forwarding** - automatically forward calls to another UK number if it arrives outside of business hours.
- **Caller menus and greetings** - make sure each caller reaches the right staff member with team extensions and menu options.
- **SMS** - use the CircleLoop number to send and receive text messages.
- **Conference calls** - easily create and host conference calls with clients thanks to a unique pin.
- **Personalised team greetings** - record caller greetings for each member of the team.
- Time-saving integrations with the tools you already use, including Hubspot, Pipedrive, Zoho, Capsule, Intercom, Slack and Google Contacts.



We understand that you'll want a closer look at any new system before making the decision to swap. That's why we offer a seven day free trial for any business. There's no commitment to sign up after the seven days are over and you're able to walk away.

During the trial, you can add phone numbers, set up the rest of the team, make and receive calls and choose the subscription plan that best suits you. Sign up today and immediately benefit from CircleLoop's functionality and ease of use.

[\*\*Start Your Free Trial\*\*](#)

