



Choosing the right agency management system

Choosing a new software system for your agency can seem daunting. There are hundreds, if not thousands, of agency management systems and tools, encompassing everything from project management to finances. And some of these are great. In fact, they're best in class for specific functionality. So how do you choose the best management software for your agency?



These best-practice tips can help break down the process for you, step by step, to make sure you're getting an agency management system that delivers just what you're looking for.

Uniquely yours

A key thing to remember is there's no such thing as a one-size-fits-all answer. It's true that most agencies share commonalities they want to manage, such as projects, clients, people and finance. But even so, this is a broad-brush picture. A small agency will operate very differently to its larger counterpart. One agency might have a strong commercial focus, another may be looking to grow, yet another may be seeking a less-chaotic approach to their everyday working patterns.

How to choose your agency management system: five step process

1. Identify your goals and pains

The first thing to consider is: why are you looking for new software?

Think about:

- **What** are your ultimate business goals?
- **How** are you hoping this system will help you achieve them? Set yourself some [SMART goals](#)
- **Which** problems do you need to solve? Identify your 'pains' or areas of weakness.
- **Why** are you changing your existing system?
- **What's** the value? Think about what savings, money or strategic value a solution would be worth?

As a guide, our conversations with agency managers have unveiled six 'classic big wins' that they think a good system will deliver.

- **Bigger** profits
- **Better** control
- **Improved** client service
- **Reduced** waste
- **Increased** speed
- **Clearer** visibility

Setting out your business needs upfront will help you understand what type of system will ultimately deliver value for your agency.

2. Establish your wants and needs

Next, ask yourself what you need to meet these goals and how you want to use the software. Consider what is essential for you to keep going at your current rate versus what you'd like to have.

Bringing in a new system means getting everyone on board with it. And there's no point in trying to do this after the event. Talk to your teams about what's important to them, as this can help you draw up a list of priorities.

The MoSCoW method can be a useful technique in helping you to define what you're looking for.

- **Must have.** Critical requirements that are non negotiable.
- **Should have.** Important but you are open to alternatives that still deliver the same results.
- **Could have.** A nice idea but nothing that's going to influence your decision too much.
- **Won't have.** Too far down on your priority list to make a discernable difference.

Top tip: talk to your teams about what they'd like to see in a system but remember you're unlikely to please all the people all the time. You need to find balance. Make it clear you're asking for opinions but not making a binding promise. As agency leader, you need to look at the full picture to get the best system for the whole agency.

3. Identify options and create a shortlist

Once you know your ultimate goals and needs, you can start looking at suppliers.

Word of mouth is your best friend here. Ask others in the industry, speak to new starters from previous agencies and check out review sites, like Capterra. Just bear in mind that those at the top might be paying for position – so use the sites primarily to check out the customers reviews.

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About Synergist

UK's leading project management and job costing system, ideal for teams of 10 to 500 who manage multiple projects.

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Pros:
Ease of use and functionality to adapt to any type of business requirement. We have 2 departments that both use Synergist differently for their needs, it is adaptable and flexible.

Cons:
The fact Synergist is database driven; means you can cut the data in so many different ways.

SYNERGIST RATINGS

Average score	
Ease of Use	★ 4.0
Customer Service	★ 4.9
Features	★ 4.3
Value for Money	★ 4.4

Likelihood to recommend

8.6/10

Synergist has an overall rating of 4.4 out of 5 stars based on 17 user reviews on Capterra.

It's important to find a software provider who has a good reputation in the industry and who will be the right fit for implementing the system into your agency. You could even ask them for references from previous clients: these might not always be available online due to confidentiality.

When looking at the types of system on the market, consider:

Functionality. A good system will support all aspects of your organisation, including new business, client management, estimating and quoting, job/project management, resource management, capacity planning, time and expenses, invoicing, reporting and forecasting.

Usability. No one wants a system that's complex and complicated. The point is to streamline processes and ultimately make life easier. So make sure you choose a system that's straightforward for all your teams to use. For example, creatives notoriously hate timesheeting, but they're an essential part of agency life. A good system will take the hassle out of this for them, not add to it.

Flexibility. You don't want to have to keep changing software every time your circumstances change. And they will change. Software should adapt to your agency: not the other way around.

Scalability. Even if growth isn't a massive part of your current plan, it might be in the future. In the same way as looking for a flexible system, finding a scalable one is just as important. A system that can grow with you means you don't have to rip it up and start again if you do expand.

Security. You need a platform that will keep your data, documents and business information safe, secure and available. When evaluating different software, consider what [security and data protection measures](#) are in place. Where is your data stored? Is it GDPR compliant? Will you need to manually back up your site? Update the software? Install security add-ons? Will there be downtime? These are just a few questions to ask when looking at different agency management systems.

Reporting. One of the biggest benefits of an agency management system is that you can get accurate data to help guide your decision making. Think about what reports would be helpful for you. Revenue and profit, sales and pipeline analysis, utilisation and recovery, capacity and scheduling, project tracking... there are lots of reporting strands within an agency. Having this [business intelligence](#) all together in one place will save significant amounts of time compared with manually compiling reports. Consider what reporting you need and how you'd like these presented, such as on [dashboards](#) or via email.

Pricing. It's important to do your due diligence when you're looking at pricing. Some systems can appear quite cheap upfront, as they offer limited-functionality packages with a low user fee. But if you need to add more features – which you very likely will – the price can suddenly rocket.

Pricing - cont. Some providers offer discounts for paying a year in advance. But beware... you could end up paying for more subscriptions than you need, eroding any discount. Plus, these annual contracts usually only allow you to cancel around the annual renewal point.

Integrations. It's important to consider how your agency management system will link in with your other business systems, such as accounting, email/cloud storage and shared platforms. Plus, finding a system with an API (Application Programming Interface) means that you can also [integrate it with any existing](#) bespoke or customised systems you have.

Implementation. Once you've found the right system, it's not quite as simple as plug and play. The best agency management systems are configured exactly for your agency's complex needs. And you need experience and expertise to help you bring this into your agency. The right [implementation and onboarding process](#) will help to make the system uniquely yours. Teams need to be properly trained, not just on how to use the system, but how to get the very best from it. Be aware that some providers offer a generic implementation, with voluntary and/or webinar-based training. These won't give you the in-depth training you need. Essentially, the whole implementation process needs to be consultative and bespoke, customising your system and training your teams to generate the best results.

Support. Once your system is implemented, it's very likely there will be times you need support. So when you're researching your provider, don't just look at the system functionality. Check out the provider's aftercare, too. Really, you need someone on hand to answer questions quickly, so you can complete the task and move on. A list of help articles is fine as added support, but spending time sifting through trying to find the answer to a specific question can be frustrating and time consuming. Also, as your business, teams and software changes, you're likely to need ongoing training and support so you can get the best from your system.

To demo... or not to demo?

It can be very tempting to demo as many as possible to get a feel for each system before you add it to your shortlist... or not. But conducting too many demos as a compare-and-contrast exercise will likely only serve to muddy the waters. What often happens is that providers show you the clever and shiny functions, which grab your attention – but aren't necessarily the things you're looking for to meet your goals and needs. So you need to stay focused. Ideally, you will find your system first, identify it as featuring all of your 'must-haves' and as many of your 'could haves' as possible. Then you can [demo it](#), as a final check that it really is the right one for your agency.

4. Make your decision

Now it's crunch time. Always remember to refer back to your original goals and needs – you might well have had your eye caught by swanky features that won't really address what you need, so keep your end goals in mind.

This is when it's easy to wobble. To think you don't actually need a new system, you're okay with what you have. But [not taking action now could end up costing you](#) in the future. The key here is to be focused but not to lose yourself in the detail. Look to the big issues. You can't solve every dilemma. And there's no point trying to. Some things might be frustrating but not sticking points. Others might only rear their head once in a while.

Stick to the big issues – pick five – and forget about the minutiae.

Think ahead. When you're setting your goals, these are your long-term objectives. So finding a system which only works in the now will simply set you up to repeat this process not too far down the line. Planning ahead can save you time and money.

Take action. You'll never really be ready to implement a new system. It'll never be the perfect time. Teams will complain. But inaction and procrastination will leave you trailing in the wake of your proactive competition.

Read: [What's stopping you from making a decision?](#)

5. Manage the change

It would be easy to think that making the decision is the last step in the process. But you absolutely have to manage the change. [People are naturally resistant](#), either through fear of losing job security or status or lack of understanding as to why change is needed. Whatever their reasons, you need to take them seriously. A seamless transition means getting everyone on board. Otherwise you could end up with a brilliant new system that no one's using.

Explain upfront that you're planning a new system, why, and what benefits it will bring.

Get everyone involved in the planning and ask what they'd like to see in the new system (remembering the earlier point that the ultimate decision lies with you).

Training and support will help to alleviate any fears and help people feel confident using the system.

Listen and accept feedback. Overlooking genuine concerns won't help, but offering reassurance will.

Ultimately, adopting or updating an agency management system can bring huge benefits to your agency. Taking out some of the everyday headaches and hassles, bringing in smoother, more streamlined processes. But it's not quite as simple as just finding a system. It's an evolving and organic process, also encompassing training, implementation and support. Using this five-step process can help you stay focused and guide your decision making in the right direction.

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