AE 101

You'd be amazed how many AEs (and agencies) let the 101 stuff slide. You may think everyone knows the obvious account management tools but our experience with agencies around the country indicates otherwise. Are these standard operating procedure where you work?

- 3 essentials - (1) Proactivity. Don't wait for the phone to ring. If it "feels" like you should contact a client, that's intuition knocking - a little paranoia can be a good thing. (2) Precedency. A fancy way of saying be early. When possible, deliver in advance of deadlines. It telegraphs how damn efficient and committed you are. (3) Value. Go above and beyond; do more than what's expected and whatever you can to make your client look like a hero. In the long run it always pays off.

- Schedule regular client meetings. Every week at the same time if possible. They're a safety valve, a tool to keep track of things in process, and an automatic way to manage changes. Use a printed agenda to bring order to the conversation and avoid time-wasting. Work volume and complexity may require *daily* meetings or phone calls.

- Summarize each meeting. Sometimes called meeting or conference reports, a written record of decisions, actions, deadlines, and commitments is invaluable. This needn't be a chore. Just use the agenda as an outline and fill in the details with bullet points - don't struggle with clumsy 3rd person passive voice "business writing." Streamline. For every topic, include Action Needed, What, Who, When. Capture go-aheads, quantities, budget approvals, etc. Then get the write-up in the key people's hands, at the client and the agency, within 24 hours of the meeting. E-mail is OK but paper's far better in my opinion because it provides a tangible immutable record. Believe me, accurate summaries of account activities are an AE's essential skill. See Who Needs Conference Reports?

- Book it. Keep a master 3-ring binder with hardcopies of meeting reports, important memos, the media plan, plus your personal notes on the account - in short, anything relevant. For any client related meeting, don't leave home without it.

- Activity briefs. Deliver a 1-page summary of account issues to your agency senior officers weekly. Keep it brief, use bullet points, make it easy to skim. It's a top-line - cover MAJOR initiatives, not every detail.

Do you think these are too simplistic? OK, but in your role you're the balance point between them and us, and these basics will help you avoid disasters.

Your job as an AE is always twofold: to work WITH clients - in harness, to accomplish what you both want to see happen - while simultaneously staying a step or two ahead.

Master that and you'll keep your clients and your agency bosses happy.

Joe Grant