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Cutting work ties without burning bridges

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Breaking up is always hard to do, especially when it involves the untangling of an agency and its client. But there are ways to make the process less painful.

Before accepting a position as director of marketing and communications at Good Samaritan Hospital in Dayton, Ohio, LuJean Smith spent several years as senior director of PR at Siemens Medical Solutions, managing multiple agency relationships.

"I recall one episode where we notified the agency we were going out for an RFP and invited them to participate," Smith says. "When the decision is made to move on, it's best to be honest and up front. We knew we were a huge client for them and didn't want to pull the rug out from under them."

Much to Smith's chagrin, the agency resigned the account, providing a 15-day notice.

"I was flabbergasted," she says. "All they accomplished was ensuring I would be unable to ever provide a recommendation."

Smith and her team may have been surprised, but they were also prepared. Because this was a multi-year relationship, the agency had extensive intellectual property and historical materials on file. Her team itemized those materials, while also documenting everything.

"Get everyone on the same page and try to prepare as much as you can prior to delivering notice to the agency to ease the pain of the separation," Smith says. "By documenting where the relationship went wrong, you can carry those lessons forward."

As director of PR for Reader's Digest Association, Ellen Morgenstern currently manages relationships with four agencies. Though satisfied with this current crop, Morgenstern has had her share of agency breakups.

"Before planning a direct conversation with your outgoing agency, review your contract closely for specifics of the 'out' clause," she advises. "Make sure you are clear on the terms and are prepared to discuss them, particularly if you are parting ways prior to the natural end of your contract."

If your needs have changed, be up front and state what they are, and allow your agency to provide feedback, Morgenstern adds.

"Consider having them re-pitch the business with a new team or new program," she says.

Morgenstern also urges being reasonable when making a list of the deliverables you expect from the agency.

"Come up with a mutually agreed upon timetable for those deliverables and keep the lines of communication wide open," she says. "Separations aren't easy; both sides will be vying for what they believe is rightfully theirs, whether it's a proper wrap-up report or final payments."

The client isn't always the one making the decision to cut ties. Sometimes, a client might hold unrealistic expectations that are never checked. Or, there might be larger business issues that a PR campaign can't address.

"One client insisted on major coverage of its growth, but was not willing to share company revenue, profits, or even number of employees," says Abby Gouverneur Carr, MD at BlissPR.

"When ending the relationship is inevitable, first get your stories straight and know all the specifics, and make sure your reasons are honest and factual," she says. "Don't take it personally and remove all emotion."

Carr also advises addressing lingering billing issues before ending the relationship, because once the account is resigned, billing and collecting that client becomes more difficult.

"Keep it polite and professional... you never know what the circumstances are on the other end of the phone," she says. "The PR program may be one minor consideration in a larger series of problems. The person you report to may end up at a new company and hire you all over again. Good people always have a way of floating to the top."

Do

Get your facts straight before tipping your hand

Assess how severing ties might affect ongoing initiatives

Provide the courtesy of advanced notice

Don't

Become emotional

Make the call until sorting outstanding billing issues

Burn the bridge. You might collaborate again at some point in the future