synergist

A practical guide for agencies

Building a commercial culture.

How to get your people making better commercial decisions, without being asked.

synergist.co.uk

About this guide.

A commercial culture is what your people do when nobody has asked them to. This guide shows you how to build one, step by step, and how to make it last.

It's written for three groups:

- **Leadership teams**, who set the direction and decide what gets noticed.
- **Team leaders**, who turn that direction into everyday habits in their teams.
- **Everyone else**, who make hundreds of small commercial calls every week.

Read Parts 1 and 2 for the thinking behind it. Use Parts 3 to 8 as your playbook. If you lead a team, Parts 5 and 6 are written for you, so start there.

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In brief

The short version.

- **Your margin is decided by small calls.** Every week, your people make hundreds of them. Most are made by good people trying to be helpful.
- **Those calls come from what people believe.** Talking, building processes and pushing harder all work on the outside. Belief forms from what people see valued, what they find themselves doing, and what they see working. So pay attention to the right things, make the right thing easy, and let people see it working.
- **A simple rhythm makes it stick.** Give each person a few numbers they own. Review them together every month. Bring them into every week. Over time, thinking commercially stops feeling like extra work. It's just how the job gets done.

The thinking · Part 1

Why commercial culture matters.

The hundreds of small calls

Picture a normal week in your agency. A project manager absorbs a change without raising it. A designer polishes something the client never asked for. Someone in new business knocks 10% off to get the deal over the line.

Every one of those calls makes sense in the moment. Every one is made by someone who cares. Add them up, and projects land over budget, your best clients become your least profitable, and your people work harder for less.

Small calls… that cost.

What it costs

10% **Over-service by just 10% on every project, and you're working for free from mid-November.**

That's not an over-servicing problem. It's a commercial problem.

Most agencies can already see their margin in real time. But numbers don't make decisions. People do. So the question isn't how to get better numbers. It's how to get better decisions.

The definition

A commercial culture is one where everyone makes decisions that help the agency grow, while keeping clients and the team happy. Without being asked.

Commercial doesn't mean squeezing clients or squeezing the team. Growth that costs you either one doesn't last.

The last three words, "without being asked", are the test. If you have to ask, it's process. If you don't, it's culture.

Where it shows up

Protect margin

Valuing your time and expertise, so the work you do is the work you're paid for.

Grow revenue

Helping clients get more value from you, because you understand what they need next.

Improve efficiency

Getting great work done in the smartest way, so your people spend their time where it counts.

You'll know you're there when a designer flags a job at 70% of budget, not 120%. When an account manager says "great idea, let me scope that" instead of "leave it with us". When a junior can tell you what their job is worth.

Protect. Grow. Improve.

What's in it for your team

A commercial culture isn't only good for the agency. It's good for the people in it. Research into burnout and engagement points to six areas of working life that decide whether people thrive at work. A commercial culture improves every one of them.

	How a commercial culture helps
Workload	Less over-servicing means fewer late nights and less work nobody pays for.
Control	People own their numbers and choose how to hit them.
Reward	More profit makes fair pay, pay rises and a shared upside possible (Part 4).
Community	Teams pull in the same direction instead of against each other.
Fairness	Clear numbers, and recognition for the right things.
Values	Great service and good business stop feeling like opposites.

Pay matters, but it won't make people care on its own. Fair pay stops people feeling short-changed. What makes them want to do great work is owning it, seeing progress and being recognised for it.

The thinking · Part 2

How culture actually changes.

Culture has three layers

Research on organisational culture says every culture is made up of three layers.



What you see
Processes, systems, your office, the way people talk, the rituals you keep.
Shows what people do, not why.

What you say
Your vision, values and goals.
What you stand for. It may not match how people behave.

What people believe
The unspoken assumptions nobody questions any more.
Why people really do what they do.

When what you say clashes with what people believe, people follow the belief. Every time. That's what makes someone say yes to a client before they've even thought about it.

Why the usual fixes don't stick

Most leaders reach for one of three things:

- **They talk.** A vision deck, an all-hands, a big speech. It changes what you say, not what people believe.
- **They build.** Another process, another rule, another sign-off step. A process can tell people which box to fill in. It can't make the call for them when a client asks for more.
- **They push.** A target, a reward, a league table. It works for a while. Then it stops.

Pushing fails because it creates controlled motivation: people act because they're told, watched or paid. Controlled motivation stops when the pressure stops. Neuroscientists have even seen it in the brain. When people were paid for a simple game and the payments stopped, they played less, and activity in the brain's reward areas dropped with it.

What you want is intrinsic motivation: people acting because they want to and believe in it. That keeps going when nobody's watching. It grows from three things:

- **Autonomy.** I own my number and choose how to hit it.
- **Mastery.** I can see myself getting better at it.

- **Purpose.** I can see how my work feeds the whole agency.

Outside in is what people do when they're told.
Inside out is what they do when they're not.

Where beliefs come from

You can't tell people what to believe. But beliefs form in three places, and each one gives you a job.

Where beliefs form	What it means	Your job
What people see valued	People learn what matters by watching what leaders ask about, react to and reward.	Pay attention to the right things (Part 4)
What they find themselves doing	People work out what they believe by watching what they do. Behaviour often comes first.	Make the right thing easy (Parts 3 and 7)
What they see working	Belief needs evidence. People need to see the results of their decisions.	Let people see it working (Parts 5 and 6)

Pay attention. Make it easy.
Show it working.

The beliefs you're changing

You're not asking anyone to care less about clients. You're changing what they believe good client service is. Here's what that looks like for a client service team.

What people believe now	What you want them to believe
A happy client is a successful client.	A successful client relationship is valuable to both sides.
Saying yes shows we're helpful.	Saying yes without knowing the impact can damage the business.

Going above and beyond builds relationships.	Solutions that work for the client and the agency build relationships.
Saying no risks the relationship.	Our time and expertise have a commercial value.
Doing extra work is part of great service.	Protecting margin is part of great service.

Run the same exercise with every team. Write down what people believe now and what you want them to believe. It becomes your brief for the change.

The playbook · Part 3

The change plan.

The plan runs in three phases over roughly 90 days: start the change, make it stick, then keep it going. Each step names who owns it.

Before you start	Phase 1 Start the change	Phase 2 Make it stick	Phase 3 Keep it going
Align leaders	Weeks 1 to 4	Weeks 5 to 12	Week 13 onwards

Before you start — Align the leadership team

Your team will watch what you do, not what you announce. So agree these four things first.

1. **Your definition.** Use the one in Part 1 or write your own. Every leader should be able to say it from memory. *Owner: MD*
2. **Your agency numbers.** Pick the five or six numbers the leadership team will track (Part 6). *Owner: MD and ops lead*
3. **Your own behaviour.** Each leader names one way they currently reward the old belief, and what they'll do instead (Part 4). *Owner: each leader*
4. **Your team leaders.** Decide who leads the change in each team, and when you'll brief them. *Owner: MD*

Phase 1 — Start the change (weeks 1 to 4)

1. **Get your baseline.** Pull the last six months: margin by client and by job, time against estimate, write-offs, and how much of the value of your time you actually bill. *Owner: ops lead*
2. **Run the margin guess.** Ask the whole agency what margin they think you make, then share the real number. The gap is your case for change (Part 7). *Owner: MD*
3. **Tell the story, not the policy.** In an all-hands, explain what profit pays for (pay rises, hires, training, the freedom to turn down bad work), share the definition, and be clear about what isn't changing. Nobody is being asked to care less about clients. *Owner: MD*
4. **Brief and train team leaders.** A half-day session on Parts 5 and 6, with time to

practise the monthly review. *Owner: MD and ops lead*

5. **Name the beliefs.** Each team leader runs a 45-minute session with their team: what do we believe now, and what do we want to believe? Use the table in Part 2 as the starting point. *Owner: team leaders*
6. **Agree each person's numbers.** Three each, chosen with the person, not handed to them (Part 6). *Owner: team leaders*
7. **Make one quick design change per team.** Swap one rule people are chased on for a change that makes the right thing easier (Part 7). *Owner: ops lead with team leaders*

Phase 2 Make it stick (weeks 5 to 12)

1. **Start the monthly numbers review.** Thirty minutes, one to one, every month, to help each person hit their numbers (Part 5). *Owner: team leaders*
2. **Start the weekly focus.** Ten minutes in the team meeting: what will move your number this week? *Owner: team leaders*
3. **Give people the words.** Introduce the three questions and the scripts in Part 7. Role-play them in team meetings until they feel natural. *Owner: team leaders*
4. **Change the client review.** Every client review starts with "is this client profitable?" as well as "are they happy?". *Owner: client services lead*
5. **Make extra work visible.** Use an investment-time code for work you choose to give away, and tell the client when you do it. *Owner: ops lead and account managers*
6. **Celebrate the right things.** Every week, publicly thank someone for a good commercial call, not a late night. *Owner: every leader*
7. **Check in as a leadership team every two weeks.** What's working, what's stuck, and where are leaders still rewarding the old belief? *Owner: MD*

Phase 3 Keep it going (week 13 onwards)

1. **Review the numbers every quarter.** Keep the ones people can influence. Drop any that people are gaming or can't move. *Owner: leadership team*
2. **Build it into hiring and onboarding.** Ask about commercial judgement in interviews. Give every new starter this guide and their three numbers in week one. *Owner: MD and team leaders*
3. **Build it into development.** Write the value each role brings into job descriptions, one-to-ones and personal development plans. *Owner: team leaders*

4. **Promote the behaviour you want.** Who you promote tells everyone what really gets rewarded. *Owner: leadership team*
5. **Refresh the toolkit with the team.** Every quarter, ask each team which scripts and design changes are working, and let them improve the rest. *Owner: team leaders*
6. **Re-run the margin guess once a year.** Watch the gap close. *Owner: MD*

The playbook · Part 4

The leadership team's role.

Your team learns what's valued by watching you. Not your vision deck, but what you ask about, how you react and what you reward. Get those three right and everything gets easier.

What you pay attention to

- **Ask about margin, not just happiness.** Start every client review with "is this client profitable?" as well as "are they happy?".
- **Ask about value, not just activity.** In one-to-ones, ask what someone did that made the agency stronger this month, not only how busy they were.
- **Watch the right clients.** Your most demanding client rarely makes you the most money. Know which clients earn their attention, and spend yours accordingly.

Attention follows noise.

How you react

- **When someone flags a job early,** thank them first, then help. An early warning is a gift, never a confession.
- **When someone pushes back on a client request,** back them. Never say "just do it, we don't want to upset the client". One sentence like that undoes a month of good work.
- **When a number goes the wrong way,** ask "what got in the way?", not "whose

fault is it?".

What you reward

- **Celebrate profitable growth, not late nights.** Give the all-hands shout-out to the account manager who grew a client profitably, not the person who stayed till midnight.
- **Tell the stories.** Share examples of people who made a good commercial call without being asked. Stories spread faster than policies.
- **Promote the behaviour.** Make commercial judgement part of how you decide who moves up.

What to stop doing

- **Naming and shaming.** An email saying "only 40% of timesheets were in" tells the other 60% that ignoring them is normal. Broadcast the behaviour you want, never the behaviour you don't.
- **League tables and one-number bonuses.** They buy the behaviour and kill the motivation.
- **Sharing the P&L and stopping there.** It helps people see the bigger picture, but it rarely changes what anyone does on a Tuesday afternoon. People need numbers they can move.

Sharing the P&L isn't enough.

Share the upside

A commercial culture should pay off for the people who build it. Share the success in a way that builds motivation, not one that buys it.

- **A share, not a carrot.** Share profit across the whole agency, based on how the agency performs. Individual bonuses tied to one number are where people start gaming.
- **Recognition, not a transaction.** "We had a strong year, so here's your share" feels like a thank you. "Hit 30% margin and get £2,000" turns the work into a deal.
- **Fair pay first.** If base pay feels unfair, nothing else will land. Get pay right, and the share becomes a thank you rather than the reason people turn up.

Then close the loop. Show people what this year's profit paid for: pay rises, new hires, training, better tools. It turns "profit" from the MD's number into something everyone can see working for them.

Go first

Review your own numbers with your team, openly, every month. If the leadership team won't do it, nobody else will.

The playbook · Part 5

A guide for team leaders.

Most commercial calls happen in your team, out of sight of the leadership team. That makes you the person who decides whether this sticks.

Your role

- **Translate.** Explain what commercial means for your team's work, in your team's language.
- **Coach.** Help each person understand their numbers, own them and hit them.
- **Clear the way.** Remove whatever makes the right thing hard to do.

Own it. Review it. Bring it.

The monthly numbers review

Thirty minutes, one to one, every month. The aim isn't to check up on people. It's to help them hit their numbers.

1. **Look at the numbers together (5 minutes).** Their three numbers, this month and the trend. Let them read them first.
2. **Ask, don't tell (15 minutes).** Use the coaching questions below. Let them find the answer.
3. **Agree one thing for next month (5 minutes).** One action they choose, not a list

you give them.

4. **Ask what you can do (5 minutes).** What's getting in the way that you can remove?

Coaching questions

Work through four stages: the goal, where things are now, the options, and the way forward.

Stage	Questions to ask
Goal	What would a good month look like for this number? Why does it matter to you?
Where things are now	What happened this month? What helped? What got in the way?
Options	What could you do differently? What have you seen work for others? What else?
Way forward	What will you do first? When? What support do you need from me?

Ask first and tell second. When people find the answer themselves, they own it. That builds the autonomy, mastery and purpose that keep motivation going when you're not in the room.

The weekly focus

Ten minutes in your team meeting. Each person answers two questions:

- What will you do this week that moves your number?
- Which jobs or clients need a flag? Anything at 70% of budget or more gets raised now, not at the end.

Once a week, ask client-facing people to share one client observation: something they've noticed that the agency could help with.

Make it small.

Giving feedback

Keep it specific and about what someone did, not who they are. Describe the

situation, the behaviour and the impact.

> **"In Tuesday's client call, when they asked for the extra round, you said you'd come back with options. That kept the client happy and protected two days of margin."**

Praise good commercial calls as specifically as you'd praise great creative work. It tells people exactly what to repeat.

Make it safe to flag problems early

People only flag a job at 70% if flagging it is safe.

- **Thank first.** The first words after a flag are "thanks for raising it".
- **Fix together.** Turn the conversation to what happens next, not what went wrong.
- **Go first.** Share your own commercial mistakes and what you learned.

When someone is struggling

Work out what's really in the way before you act.

Ask yourself	If the answer is no	What to do
Can they do it?	They don't have the skill or the words.	Train them, give them the scripts, role-play it.
Does the set-up let them?	The process, tools or workload get in the way.	Change the set-up, not the person.
Do they want to?	They can't see why it matters to them.	Reconnect their number to what profit pays for.

Most agencies treat everything as a motivation problem. More often, it's the skill or the set-up.

Mentoring

- **Pair people up.** Match people with a colleague who handles commercial conversations well.
- **Let them shadow.** Bring juniors into scoping calls and client reviews so they hear how it's done.
- **Practise out loud.** Role-play the tricky moments in Part 7 until the words feel natural.

The playbook · Part 6

Metrics by role.

Give every person three numbers they can control and can see feeding the agency's performance. Then make sure each number connects to the one above it, from the most junior role up to the leadership team.

Share what people can influence.

How to choose the numbers

- **Few and controllable.** Three per person, each one something they can move this week.
- **Connected.** Everyone can explain how their number feeds the one above it.
- **Balanced.** Mix outcome numbers with activity numbers, and add a balance check so nobody hits a number by hurting clients or the team.

Start with a baseline before you set any targets. And review the numbers to help people, never to police them.

How to cascade numbers through a team

1. **Start with the team's outcome numbers.** These sit with the head of the team and link directly to the agency numbers.
2. **Break each one into what drives it.** Revenue growth from existing clients, for example, is driven by opportunities spotted, opportunities turned into briefs, and briefs won at a good margin.
3. **Give each level the drivers it controls.** The more senior the role, the closer its numbers sit to the outcome. The more junior the role, the closer they sit to daily activity.
4. **Test the line of sight.** Ask each person: "how does your number help the one above it?" If they can't answer, either the number is wrong or nobody has explained the link.

Job titles vary from agency to agency. Map the levels below to your own structure.

The agency numbers

These belong to the leadership team. Every team's numbers should feed at least one of them.

Number	What it tells you	Usual owner
Gross margin (%)	How much of your fee income you keep after delivery costs.	MD
Revenue growth from existing clients (%)	Whether clients buy more because they value you.	Client services director
Client retention (%)	Whether clients stay.	Client services director
Write-offs (% of time value)	How much work you give away without deciding to.	Operations director
Recovery rate (%)	How much of the value of your time you actually bill.	Operations director
Utilisation (% of available hours)	How much of your team's time goes on client work.	Heads of delivery

The leadership team should also track its own behaviour: how many client reviews start with profitability, how many monthly reviews happen on time, and how many good commercial calls get recognised.

Client services

The client services director owns growth and retention. Everyone below owns a piece of what drives them.

Level	Their three numbers	How it helps
Client services director	Revenue growth from existing clients. Client retention. Average margin across the client portfolio.	Feeds agency revenue growth and gross margin.
Account director	Revenue against the growth plan for each account. Margin per account against target. Senior relationships, such as senior contacts met each quarter.	Their accounts add up to the director's growth, margin and retention.
Account	Value of new briefs from existing clients. Out-	Turns opportunities into

manager	of-scope requests turned into change requests. Write-offs on their accounts.	revenue and protects account margin.
Account executive	Client observations raised each month. Briefs signed off first time. Jobs flagged at 70% of budget.	Spots the opportunities and early warnings everyone above relies on.

Read it from the bottom up. An exec raises an observation. The account manager turns it into a brief. The account director builds it into the account plan. The director's growth number moves. Balance check for the whole team: client satisfaction.

Project management

Level	Their three numbers	How it helps
Head of project management	Jobs delivered on budget (%). Average job margin against target. Jobs delivered on time (%).	Feeds agency gross margin and client retention.
Senior project manager	Margin across their portfolio of jobs. Value of change requests raised. Estimate accuracy: actual time within 10% of estimate.	Their portfolio adds up to the head's margin and on-budget numbers.
Project manager	Jobs flagged at 70% of budget or earlier. Change requests raised for out-of-scope work. Time against estimate on their jobs.	Catches overruns early and captures work that would otherwise be given away.
Project coordinator	Jobs set up with budgets and estimates before work starts. Time logged on their jobs by the end of each week. Resource bookings that match the plan.	Gives everyone above accurate data to make decisions with.

Balance check: client feedback on delivery.

Delivery teams

This covers creative, design, development, strategy and content teams.

Level	Their three numbers	How it helps
Head of department	Team utilisation. Time against estimate across the team. Work right first time, with fewer unplanned rounds.	Feeds agency utilisation and gross margin.

Lead or senior	Accuracy of the estimates they contribute. Issues caught in internal review before the client sees them. Tasks flagged at 70% of estimate.	Better estimates and fewer rounds protect the team's numbers.
Mid-weight and junior	Time against estimate on their own tasks. Time logged accurately each day. Tasks flagged at 70% of estimate.	Accurate time and early flags make every estimate and budget above more reliable.

Measure utilisation at team level, not for individuals. Individual utilisation targets encourage people to pad timesheets. Balance checks: quality, and hours worked over contract.

Operations and finance

Level	Their three numbers	How it helps
Operations director	Forecast accuracy for resource and revenue. Recovery rate. Write-offs.	Feeds agency gross margin and gives leaders numbers they can trust.
Resource manager	Utilisation forecast against actual. Jobs fully resourced before kick-off. Unplanned non-client time.	Better plans mean better utilisation and fewer last-minute fixes.
Finance and billing	Days from work done to invoice. Invoices raised on time (%). Debtor days.	Turns delivered work into cash faster.
Operations coordinator	Timesheets complete each week (%). Jobs with budgets set before work starts. Data issues resolved within a week.	Makes the data everyone else relies on accurate and timely.

Balance check: how far the team agrees that "our processes help me do good work".

New business

Level	Their three numbers	How it helps
New business director	New revenue won at or above target margin. Win rate. Pipeline value against target.	Feeds agency revenue growth and gross margin.
New business manager	Qualified opportunities. Average discount against rate card. Proposals priced from real	Wins work the agency can deliver profitably.

	job data.	
New business executive	Leads qualified each month. First meetings booked. Lead information complete before handover.	Fills the pipeline with the right kind of client.

Balance check: first-year margin on new clients. Winning work you lose money on isn't growth.

The playbook · Part 7

Toolkit.

Practical tools to make the right thing easy. Use them in team meetings, role-play them, and adapt them with your teams.

Three questions before saying yes

Before anyone says yes to extra work, they ask:

1. Is it in scope?
2. What's the impact on time and margin?
3. Is it the right call for the client and the agency?

Sometimes the answer is still yes. The client is strategically important, or there's a bigger opportunity behind it. That's fine. The point is to choose it, not default to it.

Scripts for common moments

People often want to have the commercial conversation. They just don't know how to say it without sounding defensive. Give them the words.

The moment	Instead of	Try
A client asks for something extra	"No problem, we'll get that done."	"Absolutely, we can help with that. It's outside the current scope, so let me come back to you with the options."
You choose to give something away	Doing it quietly and saying nothing	"We've added an extra round on us, because we know this launch matters."

A job is heading over budget	Waiting until the end and hoping	"We've used 70% of the budget with about half the work left. Here are two ways we can land it."
A client asks for a discount	"Let me see what I can do."	"We can bring the price down by adjusting the scope. Here's what that would look like."
You spot an opportunity	Saying nothing in case it feels pushy	"I noticed you're planning X. We've helped other clients with that. Would it help to talk it through?"

The second line matters as much as the first. A favour the client doesn't notice creates no loyalty. It just becomes the new normal.

Make the right thing easy to do.

Enforce or design

For every rule you chase people on, ask whether you could design the problem away instead.

Area	Enforce	Design
Timesheets	A Friday deadline, reminder emails, naming the stragglers.	A prompt at the end of each task, with entries pre-filled where you can.
Budgets	Sign-off for every overrun.	Budget left visible the moment someone says yes, plus a ready-made line for out-of-scope requests.
Over-servicing	A policy against it.	An investment-time code that makes extra work visible.
Workflows	A new process designed by ops and rolled out.	The team gets the problem and the data, and redesigns the process themselves.

List the three rules you chase most often. Redesign one each quarter.

The margin guess

A 15-minute exercise to open the conversation in Phase 1.

1. Ask everyone to write down what margin they think the agency makes.
2. Collect the answers and show the range.
3. Share the real number, and what it pays for.
4. Ask: what's one small call you make every week that affects this number?

Re-run it once a year to see how far the gap has closed.

What to celebrate

- An account manager who turned an out-of-scope request into paid work.
- A designer who flagged a job early and helped land it on budget.
- A project manager whose estimate came in within 5% of actual.
- A junior who spotted an opportunity that became a brief.
- A team that redesigned a workflow and gave time back to the studio.

Celebrate the decision, not just the result.

It tells everyone what to repeat.

The playbook · Part 8

Common pitfalls.

Most culture change stalls for the same few reasons. Here's what to watch for, and what to do instead.

Pitfall	Why it backfires	Do this instead
Launching with a policy	People hear a new rule, not a new reason.	Launch with the story: what profit pays for and why it matters to them.
Making it about cost cutting	People hear "care less about clients" and push back.	Frame it as better client service: value for both sides.
League tables and one-number bonuses	They buy the behaviour and kill the motivation. People game the number.	Review numbers one to one, to help, not to rank.
Too many numbers	Nobody can focus on ten things.	Three numbers per person, no more.
Numbers people can't influence	A number you can't move can't motivate you.	Give people the numbers they control. Keep the P&L for context.
Leaders saying one thing and doing another	People follow what you do, every time.	Leaders change their own behaviour first (Part 4).
Punishing early warnings	People stop flagging, and problems surface too late to fix.	Thank people for flags, then fix things together.
Naming and shaming	It tells everyone else that the bad behaviour is normal.	Broadcast the behaviour you want.
Dropping the rhythm after 90 days	The old habits come back as soon as attention moves on.	Keep the monthly review and weekly focus going for good.

Tools

Using your data.

Most of the numbers in Part 6 come from data your agency already captures: time, estimates, budgets, job costs and invoices. Three habits turn that data into better decisions:

- **Show people their own numbers.** Job budgets and time remaining go to the people doing the job. Client margin goes to the account team. People act on numbers they can see and move.
- **Put the number in front of people when they decide.** The moment someone is about to say yes to a client is the moment they need to see what the job has left.
- **Use the same data in every conversation.** Monthly reviews, weekly focus and client reviews all run from the same numbers, so nobody argues about which figure is right.

Your systems give you the data.
Your culture decides what people do with it.

Accurate data depends on accurate time. Once people see their timesheets coming back to them as useful information, timesheets stop feeling like surveillance and start feeling like evidence.

And if your numbers live in several places, agree one source for each before you start reviewing them. People trust numbers they can check, and they act on numbers they trust.

Tools

Checklists.

Leadership team

- [ ] Agree the definition of commercial culture and your agency numbers.
- [ ] Each leader names one way they reward the old belief, and changes it.
- [ ] Run the margin guess and tell the story at an all-hands.
- [ ] Brief and train every team leader.
- [ ] Start every client review with profitability as well as happiness.
- [ ] Celebrate one good commercial call every week.
- [ ] Review your own numbers openly every month.
- [ ] Check in as a leadership team every two weeks for the first 90 days.

Team leaders

- [ ] Run the beliefs session with your team.
- [ ] Agree three numbers with each person, and show how they feed the numbers above.
- [ ] Hold a 30-minute numbers review with each person every month.
- [ ] Run the 10-minute weekly focus in your team meeting.
- [ ] Role-play the three questions and the scripts until they feel natural.
- [ ] Thank people for early flags, every time.
- [ ] Remove one thing that makes the right thing hard each month.

Everyone

- [ ] Know your three numbers, and how they help the agency.
- [ ] Ask the three questions before saying yes to extra work.
- [ ] Flag any job at 70% of budget or estimate.
- [ ] Log your time accurately each day.
- [ ] When you give something extra, tell the client.

Build beliefs.
Better decisions.
Bigger numbers.

Synergist is agency management software for creative and professional services agencies. It brings your projects, people, time and finances together in one place, so you can see where you make money, where you don't, and what to do about it.

- **One place for projects, resources, time and billing.**
- **Live insight into margin, utilisation and recovery.**
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