EX² SOLUTIONS
digital transformation partners

A GUIDE TO THE PERFECT
DIGITAL PARTNER

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How to Change Your Digital Partner When Things Go Wrong

You have invested a lot of time and effort in finding your digital partner. But something feels off. They keep missing important deadlines. Some things aren't working like you thought they would. And the results they promised you just aren't there. You finally realize that something more dramatic needs to happen. You need to know your options, and the best paths forward.

7 QUESTIONS YOU MUST ASK YOUR DIGITAL TRANSFORMATION PARTNER

Digital disruption is business model transformation brought about by integrating digital technologies into a company's processes. This disruption has helped millions of businesses reach new customers and grow their revenue. It has also left many businesses behind as they have been slow to embrace change. The main cause for these businesses falling behind, after lack of vision, is failing to adequately prepare for digital integration.

One of the most important steps a business can take in dealing with digital transformation is to have a reliable partner to help navigate through the complex digital world. However, the key word here is "reliable." Too many partners today don't offer all the insights and benefits a digital transformation partner should.

So, what are the characteristics of a reliable digital transformation partner?

Here are the questions you should ask your partners when you are trying to transition to a more digital world:

1.   What are their core beliefs?

A company's core beliefs will define how they deal with you throughout the potentially long process of digital integration. They will also reveal how they deal with adverse situations, such as a misunderstanding of goals or direction.

Does your partner lead with integrity? How do they balance confidence and humility? What is their communication philosophy? How much direction are they looking for from you, and what do they do with it?

It isn't always easy to uncover a partner's core beliefs. Probing questions and the right discussions with reference clients are the best way to start.

2.   Do they act like a partner or a vendor?

When hiring a digital transformation partner, businesses are looking for just that: a partner. Not a salesperson, an advertiser, nor a vendor.

Reliable partners are looking to help build their track record of success by helping companies achieve their goals. Vendors often have cookie-cutter platforms and solutions that they try to squeeze their partners into.

A good digital transformation partner will be laser focused on your business goals and should provide unique solutions to help you achieve these goals.

3. Do they hire a team of professionals or contractors?

Professional service agencies almost always need to bring in contractors at some point or another. The work ebbs and flows, clients sometimes have unplanned and immediate needs. But with a long term plan and engagement, who is performing your work and interacting with you?

Professional employees bring many benefits to your engagement that don't come with a group of contractors. As discussed above, professionals will know and embody the partner's culture and inhabit their core beliefs. They'll more intuitively understand how the partner operates, and know how to more quickly solve issues that arise. Professionals are also more likely to bring imaginative solutions rather than just focusing on getting the job done.

4. Do they have years of experience and a range of marketing skills?

All good marketers know how to define their target customers, reach them, and engage them. The benefits that experience can bring to this process are, however, significant.

A deeper understanding of human patterns and behaviors enables a more experienced partner to come up with more creative solutions for communication and engagement. Experience also allows a broader understanding of how people interact with design interfaces, be they front facing (your website or product application) or back-end (your dashboards and tools).

The process of digital transformation is not only about sorting out how to integrate technology into your business. It also means using marketing skills to create engaging, new narratives.

5. Can they help businesses achieve real growth results?

In the end, businesses are really looking for results: more leads, more customers and more revenue.

It takes a partner that really understands your vision, business, and clientele to help deliver real growth. The best partners see you as well as you see yourself, sometimes better. They can articulate your goals with you, and then use those goals to drive their actions.

6. Are they always looking for ways to improve and exceed expectations?

Once a partner understands your vision, business, and clientele, they can begin applying their marketing experience to your goals. This is when you should be able to see imagination, innovation, and creativity at work.

You can screen for creativity by asking potential partners to describe their creative process while you are doing research on partners. Successful marketing agencies know how to build good narratives, so an innovative partner should have stories on how they were able to exceed expectations from their other clients.

7. Do they communicate and educate in full transparency?

Business partnerships are designed to be mutually beneficial. What enables business relationships to develop are uniform rules of engagements that both partners follow. One key to these relationships is transparency; each partner having clearly communicated expectations that are founded on trust and honest values.

There are many steps that require trust in business relationships: Non-Disclosure Agreements, Letters of Intent and Performance Contracts all come with the expectation that partners on both sides are going to honor their agreements. Early transparency in communications around any issues or hurdles makes it easier to solve problems sooner and starts building that necessary trust.

Finding the right digital transformation partner isn't easy. It takes some amount of research, conversation and communication to ensure that your partner understands you and your business and will work aggressively on achieving and exceeding your goals in a manner that syncs with your company and culture. The payoff for success is tremendous, which is why this search is worth the investment.

HOW TO TELL IF YOU HAVE THE WRONG DIGITAL PARTNER

You needed to find a digital partner to help get ahead of the digital disruption that is occurring in your industry. You read that 84% of companies fail at their digital transformation efforts, so you make sure to invest the time and do the research to find the right partner.

Now you find yourself half-way through your project and the end isn't as clear as you thought it would be. Or you expected your new systems to launch by now, but your partner has missed the date more times than you can count. Or perhaps you've launched, but you haven't seen the promised results yet.

Who Recommends Them and Why

It's easy to believe that recommendations equal competence. But believe it or not, software vendors and other technology providers will frequently recommend digital agencies and partners for reasons other than pure competence. Sometimes these reasons will be completely opaque to you.

At times vendors recommend agencies simply because of their size, with the belief that they can handle any client. Other times they have provided business to the technology platform and your lead is some form of payback. Or the agency was a large sponsor at the platform's last conference.

Naturally, we should still pay attention to recommendations. Negative reviews, for example, tend to be reliable. A good digital partner should receive a recommendation because they did stellar work for the company and have results to show. The work and results are the metrics to dig into.

Counting What Counts

It's often been said that if you can't measure it, you can't improve it. One way to tell if your digital partner is aligned with your corporate vision and goals is to see if they are measuring the same things that you are. Are their reports products that you can turn around and use internally? Or do you leave status updates without any sense of what they are working to improve?

When an agency is aligned with you they understand your culture, goals, and operations. They can speak your own internal language and know what's important to you. Their reports and metrics should reflect your
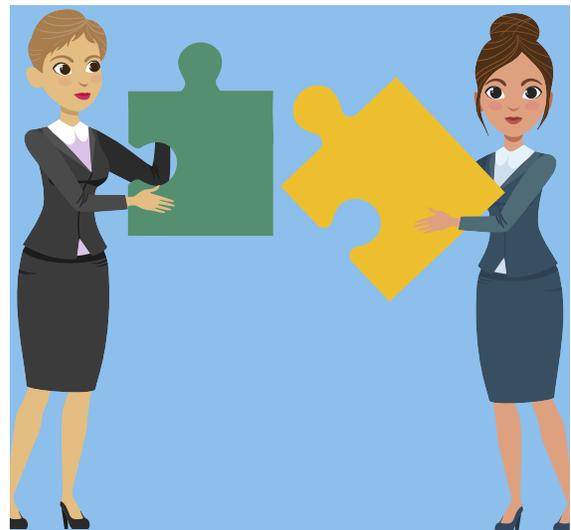
goals. On the other hand, the use of a lot of buzzwords or jargon might be hiding clear communication and accountability.

Run like a Swiss Watch… or Not

External events affect us all. Some are small, like people falling ill. Some are larger, like when strategies change because of competitive moves or investments. All of these can cause deadlines to slip.

The better agencies communicate changes and slips as far in advance as they can, and understand the underlying reasons and root causes for these project changes. They will map out contingencies and explain to you how changes to products or timelines today will have an impact on deliverables and forecasts later in the month or quarter.

But be on the lookout for small deadlines that keep slipping with little to no explanation or examination. Good agencies will build a little buffer into their timelines and forecasts, as they understand that there are unforeseen events ahead. Other agencies stretch to meet client timelines and goals and aren't making space for everyday disruptions.

The Ever-Changing Team

Transitions are always a natural part of work. Employees get promoted, they move on to new challenges, or they follow partners out of state. None of these things should be alarming, they are perfectly natural.

However, a constantly changing team is a sign of a partner that has a difficult time managing their human resources. Having to constantly deal with an influx of new team members invariably slow a project down.

Similarly, be cautious if you find yourself talking to senior partners during the early days, then get assigned a junior AM or dev team. Malcom Gladwell says it takes 10,000 hours to become an expert at anything. You don't want your mission critical project to be the training ground for your client's farm team.

In the end, the right digital partner can be a tremendous asset. Should you find yourself wondering how you got in the situation you are, or fearing the future of your project, it might make sense to reevaluate your business partner relationships and determine how to improve your situation.
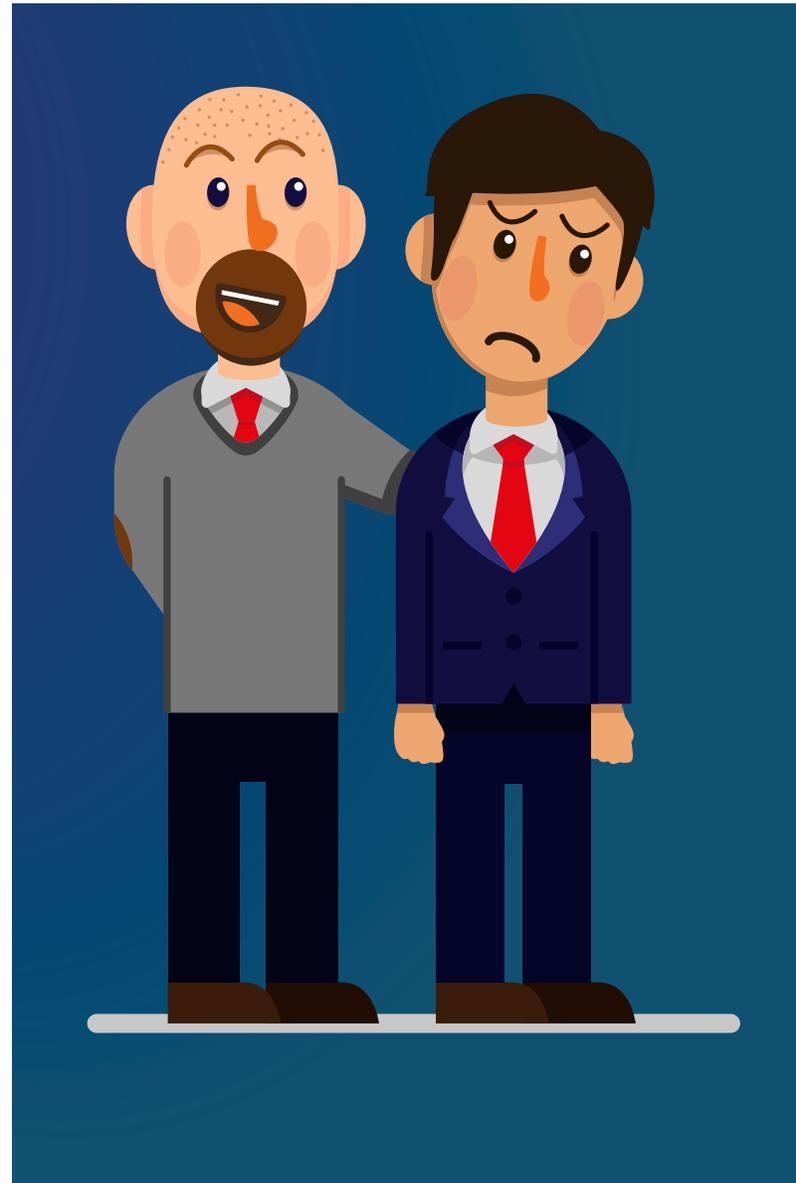
HOW TO CHANGE YOUR DIGITAL PARTNER WHEN THINGS GO WRONG

Y ou have signed an agreement with a digital partner. You brought them on because you were hoping that they would help hasten the process of digital transformation. However, something does not feel right, and they keep missing important deadlines. After talking with some of your peers, you realized that your digital partner is not up to par. Therefore, you want to change.

Now you must confront a serious problem: how do you break free? You do not want to hurt your company by rapidly firing a team. You also do not want to have to spend months undoing what they have done. How do you get rid of a bad digital partner without disrupting your whole business?

Like most business plans, you need a strategy. It would be a bad idea to make decisions without knowing your options. You do have different alternatives when it comes to changing your digital transformation partner.

Phase Out

If you have been working with a digital partner for a long time, chances are they have many deep-seated procedures in the company. These procedures (e.g. how to access your digital platforms and assets) might only understood by your digital partner. This means that if they were to rapidly discharged, the details on all these procedures might be lost with them.

A planned phase out can be the best alternative. Instead of getting rid of your partner first, research a new, better partner that will and have the old partner bring the new partner up to speed. This reduces overhead and smooths the transition.

Shrink Responsibilities

Another tactic to consider is shrinking the responsibilities of your digital partner. The ultimate goal here, of course, is to remove the underperforming digital partner. However, to avoid cutting contact completely, you can reduce the scale and scope of their responsibilities. This keeps the relationship intact while reducing the negative impact of having an upset partner.

Consider this option when you are still not sure if you can operate without the digital partner, but still want to change partners (or bring on staff) when the opportunity presents itself.

Collect Data and Information

Often times the importance of collecting all the data a digital partner has in its work for your company is overlooked. When changing digital partners, a huge cost comes in the form of getting new partners or staff up to speed. To help significantly reduce cost, it may be a good idea to systematically collect all the appropriate information from your old partner and give it to the new partner.

To ensure best results, discuss creating a data brief with your old partner before you discuss transitioning to a new partner. That way, you will not have to deal with potential pushback or foul play. Then keep that information for your new digital partner to reference.

Also, don't forget to review your existing contract or agreement between you and your digital partner. There may be a notice period or other phase-out requirements that you want to incorporate into your planning.

Work with a Second Partner

It might seem counterintuitive at first. How can one work with two partners? Will that not just create more chaos and disorganization? Although it might seem to be a bad idea, working with two partners can actually have a positive effect if executed properly.

Of course, it all depends on proper execution. Having two partners working independently and without cross-referencing their work is indeed a terrible idea. However, using two partners

to push each other and verify the other one is doing the job correctly can be very helpful. As the old saying goes "competition breeds success."

If you have a digital partner that is simply not up to par, consider bringing on an additional team to help expedite the process and keep each other accountable. It's an extra cost, yes, but the return on this extra spending will be better performance and a smoother transition (when it comes to that).

**EX² HELPS CHOOSE THE RIGHT PARTNER FOR THEIR DIGITAL TRANSFORMATION.
CONTACT US FOR HELP IN MAKING THE RIGHT CHOICE.**