

Working with agencies in *growth or transition*

Fractional leadership & training for agencies across
Client Leadership | Operations & AI Integration

why?

THE AGENCY *playbook* HAS CHANGED

**The next era
is already here,
and the old rules
no longer apply**

Clients expect more.
Technology has
accelerated delivery.
Traditional pricing
models are under strain.

Agencies need to move,
and fast.

The uncomfortable realities agencies are facing

one **Client Services** struggling to unlock the full value of client relationships

two **Growth exposing gaps** in process, operational model and decision-making

three **AI & automation are changing the economics**, but the business model stays the same

***Sound
familiar?***

- **Teams designed for delivery, not solutions**
 - Margin erosion, overservicing
 - Growth targets over-reliant on new business
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- **Ways of working not scalable**
 - Delivery inefficiencies creeping in
 - Teams built around people, not platforms and structure
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- **AI usage is ad-hoc, not embedded**
 - Lack of governance with individual AI adoption
 - No clarity on commerciality of AI enabled work
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REAL CHANGE NEEDS *ownership,* NOT JUST ADVICE

I don't hand over recommendations.

I work inside your team until the change is real and lasting.

Where Ella Rosie's can help you take ownership

one

Shaping a Client Leadership team that drives growth

CS teams that grow revenue, not just manage relationships.

Upskilling client-facing teams, giving them the knowledge and confidence to hold better commercial conversations.

two

A future-fit operating model that scales

Aligning operating models to market demand, client need and agency ambition.

Structure and ways of working built around your people *and* your process, in the right balance.

three

AI & automation that protects margin

AI embedded deliberately – protecting margin & creating commercial advantage. Practical, governed adoption that builds confidence across the whole team, not just the early adopters.

Turning existing clients into growth drivers

Client Unlock is how I help client-facing teams drive maximum value from the clients they already have. It spans structured training, standalone masterclasses and ongoing thought leadership through The Agency Squeeze blog, tackling the real issues agency teams face around client experience, commercial conversations and account growth.

The goal is simple: give client-facing teams the skills and confidence to spot opportunity and act on it.

Client Unlock

For agencies who want to turn existing clients into their biggest growth lever

- Client retention
- Lifetime value
- Organic growth

The playbook has changed. Brands have more options, higher expectations and less time for agency relationships that don't extend beyond delivery. Being closer to your client's business isn't a nice-to-have, it's the difference between relationships that grow and ones that plateau.

What keeps clients (and grows them), is the experience of working with you. How well your team understands the drivers and strategy behind the brief. How commercially confident they are and how consistently that comes through in every interaction. Somewhere between the pitch and the day-to-day delivery, that experience can start to waver. And often by the time it surfaces, the client has already started to consider alternatives.

Client Unlock builds the capability and the conditions to make sure that doesn't happen.

01. Client Experience

Experience is everything from how you pitch and onboard to every interaction in between.

This module maps the full client journey and turns it into a system that works day-to-day for your agency, built around what's realistically feasible rather than what just looks good on a plan.

02. Leading with Value

There's a difference between delivering well and being seen as a strategic partner.

This module is about bringing commercial thinking into everyday conversations, shaping briefs rather than just receiving them, and framing work around what it delivers for the client's business.

03. Unlocking opportunities

Growth within existing accounts rarely happens by accident.

This module covers how to plan accounts with intent - mapping where opportunity sits, spotting whitespace the client hasn't defined, and building a clear picture of where the relationship could go. So when the commercial conversation happens, the groundwork's already done.

04. Commercial confidence

Commercial confidence changes how a client-facing team operates.

This module builds understanding of the numbers that matter - how work gets scoped, priced and protected - so client-facing teams can talk confidently about investment, scope and value, without underselling, over-promising or giving ground they shouldn't.

05. Handling difficult conversations

Difficult conversations don't damage client relationships - avoiding them does.

This module builds the confidence to address challenges constructively - scope creep, quality issues, misaligned expectations, a drifting relationship - so these conversations don't just resolve problems, they deepen trust and raise the standard of how you work together.

06. The system behind the work

The experience a client has shouldn't depend on who's managing their account that day.

This module builds the practical foundations for consistency - account structure, communication cadence, shared ways of working, and AI in practice tools, prompts, workflows that make client work faster and sharper. Less reliance on individual knowledge, more confidence across the board.

'CLIENT UNLOCK' MASTERCLASS

Client Experience for the Automation Era

Because AI won't do this bit for you!

ella rosies.

Client Unlock Masterclass: Client Experience for the Automation Era

£195
Wed, Sep 9 • 11 AM GMT+1

Get tickets

ohhhhh, now you've got me thinking.

What 'Surprise' research teaches us about Client Experience
The Agency Squeeze 🍷 Edition #04

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What 'Surprise' research teaches us about client experience ✨

18 years driving change inside agencies across Manchester, Leeds and London

Client Services

Experienced in building and fixing CS operating models

Led CS, Strategy & PM departments

Built new divisions:

£0 -£1.5m

<12 months

Commercial & CSAT responsibility for 30+ client portfolio

Brand cross-sector experience: GE Healthcare, GSK, Adidas, Greene King, Reebok, Waitrose, RSA, Gallagher Insurance, Shepherds Friendly, NSPCC, Diabetes UK.

Business Strategy & AI implementation

Led company restructure & transformation of 70-person agency

Designed & delivered company-wide strategy

Launched new start-ups within existing agencies

Led AI integration & readiness programmes. Led build of AI products

Hands-on delivery of Innovation (previously Innovation Director)

Explored & developed IP to support future capability

What it's like working together

"I've worked closely with Ella for over six years. Her attention to detail and leadership have had a lasting impact on our agency.

*Ella combines **sharp operational focus with a passion for people** and culture, reshaping our client services team, bringing direction and focus".*

Jon Butler, CEO Trunk

*"I've worked in closely with Ella for years and have seen first-hand how she operates. I've seen her guide teams through difficult situations, acting as a rock that others naturally look to. She's **inherently strategic**, but equally empathetic. She's able to step back and **assess situations objectively**, quickly pinpoint the core issues, and connect them to what will genuinely move a business forward.*

*Importantly, I've seen her work **drive real commercial outcomes**, not just good thinking on paper".*

Paul Stevens, Co-founder cocreatd & Ex-board director, Social Chain

A soft spot for purpose-led work

Pro-bono support for brands 'doing good'

I've got a soft spot for purpose-led brands. If that's you, and you fancy working together, I set aside one free half-day a month for exactly that - no catch, no agenda. Just time and support.

Whether that's working on your sustainability, social impact or B Corp initiatives...or simply trying to build something that genuinely means something, this one's for you.

Some of the purpose-led work that's shaped how I work

Led successful B Corp certification (inc. legal & governance requirements)

Green Team facilitation

Embedded social and environmental initiatives

Driven ESG strategy as part of Innovation function

Designed and embedded people & culture strategy, (achieved Top 20 Campaign Best Places to Work)

Based in Manchester 🐝, working with agencies UK-wide

THE AGENCY RULEBOOK HAS CHANGED *HAVE YOU REWRITTEN YOURS?*



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