Joelle H.: Think of your affiliate management agency as an extension of your other marketing channels and of your internal team. The more your agency team knows, the better they'll be able to accomplish what you're looking for.

Lenox Powell: I'm Lenox Powell, the host and producer of the Outperform Podcast. On these episodes, I talk with Acceleration Partners team members, industry partners, and clients to bring you a behind the scenes perspective on what the world's leading companies and performance marketers are doing to outperform in their business and marketing partnerships.

Lenox Powell: In the world of affiliate marketing, different clients want and need different things from the agency managing their affiliate program. Certainly, there is no one-size-fits-all approach to affiliate program management. However, there are some similarities between different types of client contacts depending on where they're at in their role, especially with regard to their needs, concerns, interests, and level of affiliate knowledge. Here to break this down for us is Joelle Hargadine, a senior account manager at Acceleration Partners. Welcome, Joelle.

Joelle H.: Thank you, Lenox. It's such an honor to be here today.

Lenox Powell: You've come up with some really insightful role categorizations for different types of client contacts. Talk a bit about how you came up with them.

Joelle H.: Yeah. I've had the pleasure of working with many different client contacts, who hold varying positions at different companies over the years. While they may hold different titles, in generally, the roles these clients contacts can play tend to fall into one of these three categories, each which have different needs, different expectations, time availability, responsibilities, et cetera. What I've found, and even verified with quite a few colleagues here at AP, is that by understanding the roles these clients are in, it's much easier to support them and get them the information and resources they need in the way that's most useful to them. What's more is that when a client contact understands what role category they're in, it's so much easier for them to communicate their wants and needs to the team managing the affiliate program.

Lenox Powell: Interesting. Okay, so let's dig into what these different role categories are and your descriptions for them.

Joelle H.: Sure. The first role is what we like to call the tactical role. In terms of experience, this client type is likely to be relatively new to marketing and very new to affiliate marketing. Title-wise, they're likely to be like a marketing coordinator or something similar and have job responsibilities that are more tactical or execution-focused. This could be anything like reporting, campaign setup, promotional support, so on and so forth. Because this person tends to have more time that they can allocate to their affiliate program, they're also likely to have more time to absorb the information that their agency contact is sending them, including unique partnership opportunities, affiliate targets, performance analysis, and updates to the program strategy.

Joelle H.: All that said, what is important to note is that since this person tends to be quite new to the world of affiliate marketing, at the outset, they are likely to be more affiliate 101 type education before their agency partner can dive into developing and executing on higher level strategy. This affiliate 101 type education should probably include things like clear definitions for different types of affiliate partners. I know you've touched on this a little bit in previous podcasts, but there's different types like content, loyalty, deal, card-linked, coupon, mass media. The list goes on and on, and so we want to make sure that they fully understand the nuances of each type and then more contacts, overall, related to the why or how something needs to be done within their affiliate program. For example, we're going to do an FTC audit. This is why, and this is what we're looking for.

Lenox Powell: Okay. So in general, for someone in a tactical role to be successful and really get the most out of their affiliate agency partnership, they are likely going to need more context, information, and explanation.

Joelle H.: Yeah, absolutely. Ideally, they should let their agency contacts know that they hold a more tactical role so that sufficient resources and education can be provided to them at the start of the partnership.

Lenox Powell: That makes a lot of sense. Okay, so moving on to the next role category.

Joelle H.: Yeah. The next one is what I'll call the go-between role. I refer to them as the go-between because they're often the go-between for the agency and the company's brand leadership. This person is likely to report to someone, but have a person in the tactical role reporting to them. Title-wise, they're likely to be a marketing manager or something in that vein. In terms of experience, the go-between is likely to be more experienced in marketing and possibly more well-versed in the world of affiliate marketing, although they may not be. There are cases when someone in the go-between role may need some affiliate 101 type education at the outset, but by and large, they have a general understanding of affiliate. Their job responsibilities are also to include overseeing multiple channels.

Joelle H.: So, whereas a tactical role person could be dedicated to the affiliate channel, a go-between person is likely not. While communication may not need to be as in-depth in contextual with someone in a tactical role might need, it still typically tends to be more long form, include recommendations and information that's more in a proposal form, if you will. For example, for a go-between person, we, as their agency, might say, "We recommend A, B, and C, and here's why. Please let us know if we can move forward." While it's ideal if they have authority to respond with approval, they may not, and they may need to get authorization from a superior. Either way, it's really important for their agency partner to know that, as well.

Lenox Powell: What would you say someone in this go-between role needs to be successful in their role and to get the most out of their affiliate agency partnership?

Joelle H.: They're likely going to need to connect with their agency team on a more consistent basis and want regular performance reporting with supporting insights and next steps so they can share those results with whomever they're reporting to. They're also likely to want more information around the nuances of affiliate-related to reporting the partners in their program and the performance of that program. Then from there, they're probably going to take that information, condense it, and then provide the high-level takeaways to someone in a brand leader role.

Lenox Powell: Okay, so you've mentioned this brand leader role a few times here. Let's talk about the brand leader role. How might you describe them and what they tend to need from their affiliate agency?

Joelle H.: Yeah. This is the third category. Someone in a brand leadership role may have a tactical or a go-between person reporting to them. Title-wise, they are most likely a director level and above, maybe even a director of performance marketing, a VP of marketing, or CMO. From an experience standpoint, it's unlikely that they'll need affiliate 101 type education or resources. They are more likely to have a strong knowledge of the channel, its nuances and value. They just don't have the time to focus on it, like a tactical or a go-between person can. If an agency is working directly with a brand leader, that agency team needs to understand that that person is relying on them to make those important decisions related to their affiliate program, and basically, run autonomously. That said, it's also important to understand that a brand leader needs to be provided with the most pertinent, high-level information.

Joelle H.: For example, where a tactical role person might want all the details around the who, the what, when, where, why, and how of a partnership opportunity, someone in a brand leader role simply just doesn't have the time for that. They want to be kept in the loop as to what their trusted agency partner decided upon in terms of the types of partners selected for their program and whether performance is on track or off track, but aren't necessarily looking for approval requests.

Joelle H.: For someone in a brand leader role to be successful and get the most out of their affiliate agency partnership, trust and transparency is essential from both sides. It's really important for people who self-identify as a brand leader to communicate the type of information they want and need from their agency partner. For example, if they don't have time to digest a weekly performance report or even a longer end of month report, that's fine. It's important to convey that to their agency contact. Otherwise, if they don't, their account team, thinking that they're doing their job and providing good client service, is likely to put in time and effort to produce those resources in formats that may not be as helpful to someone in a brand leader role.

Lenox Powell: Okay, yeah. So being as busy as they are, what might communication with a brand leader look like?

Joelle H.: That's a good question. From my experience, I'd say short, to the point emails, sent as seldom as possible, and messaging would be along the lines of, "Based on what you told us, we're moving forward with strategy A, B, and C." Whereas, with someone in a go-between role, emails and calls are likely to be more frequent, and we're going to probably take more of a recommendation approach, such as, "Based on what you've told us, we recommend moving forward with strategy A, B, and C, and this is why. Please let us know if this sounds like a good course of action to you and your internal team."

Lenox Powell: Why do you think it's important for our client contact to self-identify what role category they're in? I mean, how does that help their relationship and interaction with their affiliate agency?

Joelle H.: Well, it's not just the role, but also the needs of the client contact. If you don't communicate the role you are at, then you could be missing out on a couple things. You could be missing out on some of the resources the agency is providing or can provide. You might be receiving information you don't need, or don't have the time to open or review, for example, those end of month reports. The client is paying for the affiliate agency services, so they are receiving all sorts of information, but it may not be the information they really need. Each client contact type is different, and the key here is, we want to make sure that we're providing the most valuable information upfront.

Joelle H.: Here's the thing. You can be in any of these roles and work with your agency successfully. The only difference is in the nuances. For example, the quantity and the volume of communication and information could vary. So, the hope from the topic of this podcast episode is that someone who may self-identify as a brand leader will realize that their affiliate agency partner doesn't need to inundate them with detailed information and reporting every month. Their agency partner just needs to know what information they'd like to receive in order to make decisions effectively so that they can accommodate that, same thing for our tactical role person. It's important for them to know that even if they know very little about affiliate, their agency is also there to help ensure that they are successful in their role and should provide the information and resources to support that.

Lenox Powell: Absolutely. I mean, because you know quite well, in our worldview, it's our job, as an agency, to meet the client where their needs are. Those needs and wants will vary from person to person, depending on their level of understanding, their level of available time, and their level of trust in their agency.

Joelle H.: Exactly. Think of your affiliate management agency as an extension of your other marketing channels and of your internal team. The more your agency team knows, the better they'll be able to accomplish what you're looking for.

Lenox Powell: Well, I think that that is a perfect note to end this episode on. Joelle, thank you for taking the time to share your perspectives around all of this and break down these client role personas for us, really useful and helpful information.

Joelle H.: Oh, it was my pleasure, Lenox. It's such an important topic, and I'm happy to support.

Lenox Powell: To our listeners, always appreciate you tuning in to hear our affiliate and partner marketing insider insights. We'll include some additional resources for you related to this topic on the show notes for this episode.

Lenox Powell: One of our listeners recently shared a review on our Apple podcast page stating, "Great insights for any digital marketer, especially those with interest in the performance marketing channel." If you, too, gain some good takeaways from this or any episode, we'd very much appreciate you leaving us a rating or a review on our Apple podcast or Stitcher page, or really anywhere you tune in from.

Lenox Powell: Until next time, keep outperforming.