

First 100 days

Congratulations on your new agency relationship. To set your new partnership up for long-term success, we have created a series of simple onboarding checklists. Whether this is the first time you have done this, or you would like a helpful reminder, our checklists will give you the tools needed for a successful (and speedy!) onboarding process.

This checklist has been designed to help you think through the first 100 days of your new working relationship.

1 Identify and appoint a transition project team (client, agency, finance, IT, data, and IT) and define roles and focus to ensure a smooth transition where a previous client: agency relationship exists

Who When

2 Share and agree with agency the scope of work for the first 100 days, timescales and where relevant exiting agency arrangements

Who When

3 **First 30 days priorities - focus is people and communication:**

- Agree agency staffing and names
- Arrange immersion sessions, and meet and greets
- Agree meetings infrastructure, purpose and who attends what (and who doesn't)
- Agree core working practices (briefing, development sign off, evaluation) with the agency and what are the right inputs and outputs at each stage
- Agree scope of work for first 100 days and timescales





Setting up for success: First 100 days

- Agree priorities for kick off, initial milestones including timelines and key deliverables
- Draft framework for SLA's (focus on what matters most and what can be easily measured) to be used during first 3 to 6 months and 'road tested'
- Agree specific media commitment time frames for planning, buying and asset delivery
- Agree internal communications plan and key messages about the scope of work to set and manage internal expectations
- Agree and launch relevant induction events
- Introductions to other agencies on roster
- Agree and set collaboration expectations, link back to commercial terms
- Initiate relevant test projects and learnings
- Management of exiting agency and TUPE considerations (UK only)

Who When

4 Agree day 30 to 60 priorities - focus is kick off and process:

- Embed agreed working practice arrangements with the teams, and stakeholders
- Start project/campaign activity (brief, development, evaluation)
- Write first briefs and ensure signed off internally by all stakeholders before work starts (client/ co-creation/ agency)
- Create six-month communications plan or "road map" of what will happen when
- Communicate as relevant to other agencies
- Enable a weekly forum to manage issues and changes. This should not be the status call
- Exiting agency handover completed and no new briefs given from agreed date

Who When





Setting up for success: First 100 days

5 Agree day 60 to 100 priorities - focus is performance and review:

- Review outputs to date vs KPI's and SLAs, and expectations
- Refine and agree any changes to agency team (based on view from first two months fit/role/match with client and considering capability/capacity)
- Address information gaps and needs
- Identify blocks and barriers from client and agencies point of view to output and ways of working
- Review client sign-off process, and assess what can be changed to be more efficient
- Agree wash up process and agree 6-month service review on performance
- Identify relevant research/ knowledge gaps (consumer, media landscape) and longer term technology and transitional requirements (client and agency)

Who When

Want to learn more?

Be sure to download the full 'Setting up for success' series which also includes a practical guide on how to onboard new agency operations along with checklists for the first 10 and 30 days of a new agency relationship.

To chat with us about your specific needs, please drop Vicky an email on vgillan@aargroup.co.uk

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