First 30 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 30 days of your new working relationship.

1. Client to agree Agency team (day to day/ senior/final names/% of time on account.) ☐
2. Client and Agency to map people and teams and agree key relationships (mapping onto Client names against roles/responsibilities/rhythm/flow) ☐
3. Client to share corporate and marketing goals and plans for 1 to 3 years (high level vs. detail) ☐
4. Client to share scope of work for first 100 days and phased plan for exiting agency (if required) ☐

Setting up for success: First 30 days

5 Client and Agency to agree high level goals for first 100 days, and first year directionally ☐

6 Agency to draft and agree key milestones to meet scope of work and transition deadlines and, if relevant, a mutual road map to drive progress, anchor decision making and help communication ☐

7 Agency to agree client induction events and phased plan for attendees/dates ☐

8 Client to agree Agency induction events and phased plan for attendees/dates ☐

9 Client to share budgets financial process and invoicing protocols ☐

10 Client and Agency to agree communication plan for wider internal community; and expectations ☐

11 Client and Agency to agree communication plan for other agencies on client's roster; and agree collaboration expectations (to the right level of detail) ☐

12 Initiate weekly status meeting (business activity) and agree who will attend/dial in and what the regular agenda items will be. Agree any peak period activity, including what can flex/what can't ☐

Setting up for success: First 30 days

13 Initiate daily/weekly transition meetings if asset transfer or media deals are needed from another agency, for example (transition activity) ☐

14 Client and Agency to agree key working practices around:

- Who (mapping of key meetings, right attendees, issues management and escalation process)
- How (briefing, development, sign off, evaluation, learnings, always on vs peak)
- Information, data and tech needs
- Sessions to be held with senior, day to day and transition team member(s) to ensure clarity, transparency, and alignment ☐

15 Transition meetings with creative agency including transfer of assets from exiting agency ☐

16 Transition meeting with media agency including data share/access, review of current media commitments with exiting agency and assume negotiation authority of all uncommitted forward bookings ☐

17 Client and Agency to agree relevant research and information needs including historical performance data, research, insight on brand, business, market, consumer, competitor and previous activity – what, when and who creates, frequency and sharing protocols ☐

18 Relevant pilot/ test projects agreed and started with agreed inputs, outputs and milestones) ☐

19 SLA and KPI framework defined and agreed for use as guide for first 6 months, with objective review held at 6 to 9 months to assess successes, learnings and align for success/continuous improvement looking ahead ☐

20 Commercial negotiations concluded and contract drafted and signed including remuneration model and any PRP/PRFs ☐

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 100 days of a new agency relationship.

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

Vicky Gillan
Lead Consultant, Drive