On-appointment - AAR Best Practice guide to establishing your new client: agency relationship

Here are the AAR top tips to think about once you've appointed your new agency. These have been specifically designed to help you think through the key steps, working with your new agency, to establish the new relationship. They consider induction, transition and working practices needs during the first 100 days and focus on getting your new relationship off to the very best start.

No.	Pre-appointment	Action	Done
1.	Identify and appoint Transition project team (client, agency, finance, IT, data and systems) and define role and focus		
2.	Share and agree with agency scope of work for first 100 days, timescales and exiting agency arrangements		
3.	**First 30 days priorities – (focus is people and communication)** a. Agree agency staffing and names b. Agree meetings infrastructure and attendance c. Agree core working practices and mapping into agency d. Agree scope of work for first 100 days and timescales e. Draft framework for SLA's (focus on prevention of things going wrong not just measurement) to be used during first 3 – 6 months and 'road tested' f. Agree internal communications plan g. Agree and launch induction events h. Introductions to other agencies on roster i. Initiate test projects and learning's j. Management of exiting agency and TUPE considerations (UK only) k. Commercial negotiations and contract draft and sign l. See check list for deeper drill (Appendix 5). We could build more detailed check lists for all stages if commercial value (pre transition, first 30 days, 30-60 days, 60-90 days, 6 months, 6-12 months)		
4.	**Agree day 30 – 60 priorities (focus is immersion and process)** a. Complete induction events b. Communicate agreed working practice arrangements to teams and stakeholders c. Amend client and agency templates as needed (e.g. campaign brief, creative brief) d. Launch internal communications plan e. Communicate as relevant to other agencies f. Start project/campaign activity (brief, development, evaluation) g. Transition project meeting recommendations for longer term technical issues and changes h. Exiting agency handover completed and no new briefs given from agreed date		

5.	**Agree day 60 – 90 priorities (focus is performance and review)** a. All briefs into new agency b. All assets transferred to new agency c. Any final work completed by exiting agency and invoices raised immediately on completion d. Refine and agree any changes to choice of agency people (based on view from first two months fit/role/match with client) e. Agree relationship evaluation process (AAR Early Days review @ 4 – 6 months; 2 way review, on-line; focus on performance, priorities, expectations) and thereafter annually using AAR Any Day review (2 way review, on-.line; focus on performance, priorities, perception and looking ahead) f. Identify relevant research/knowledge gaps (consumer) and longer term technology and transitional requirements (client and agency)		

First 30 days priorities checklist

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No.	Action	Done
1.	Client to agree agency team (day to day/ final names/ final capability of resource)	
2.	Client and Agency to map people and teams and agree key relationships (mapping onto client names against roles/ responsibilities)	
3.	Client to share corporate and marketing goals and plans for 1 – 3 years	
4.	Client to share scope of work for first 100 days and agreed plan with exiting agency	
5.	Client and Agency to agree high level goals for first 100 days and first year	
6.	Client and Agency to agree transition team members; remit, objectives, priorities, principles and milestones	
7.	Agency to draft and agree key milestones to meet scope of work and transition deadlines	
8.	Agency to agree client induction events and attendees/dates	
9.	Client to agree agency induction events and attendees/dates	
10	Client to share short term budget and financial process and invoicing protocols	
11.	Client and Agency to agree transition communication plan – key messages, timings, channels – for wider internal community and senior people at other agencies on clients roster	
12.	Initiate weekly status meetings (business activity)	
13.	Initiate weekly transition meetings (transition activity)	
14.	**Client and Agency to agree key working practices around** - People (mapping of key meetings, right attendees, issues management and issues escalation process) - Processes (briefing, development, sign off, evaluation) - Information and technology Sessions to be held with senior, day to day and transition team member(s) to ensure short term	
15.	Transition meetings with creative agency, including transfer of assets from exiting agency	
16.	Transition meeting with media agency, including 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	
18.	Test project starts (with agreed milestones)	
19.	SLA and KPI framework defined and agreed for use as guide for first 6 months	
20.	Commercial negotiations and contract draft and signed	