First 10 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, this will give you the tools needed for a successful (and speedy!) onboarding process.

This checklist focuses on the first 10 days and should supplement both your and your agency's own specific approach and needs.

1 Client (core team) contact list

- ☐ By individual, team, location
- ☐ By scope of work
- ☐ By sign off limits and responsibilities
- ☐ By length of time in role and in the organisation
- ☐ Team biogs and photos
- ☐ Contact details (title, e-mail, mobile, WhatsApp group)

2 Client structure chart

- ☐ By team, reporting lines, location
- ☐ Board or most senior directors (including biogs and photo,contact details)
- ☐ In house team (remit, contacts, internal protocols)

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3 Client meeting infrastructure

- ☐ By attendees, objectives, frequency
- ☐ By outputs and reporting lines (into other meetings)
- ☐ Including details on who chairs, sets the agenda, key documents etc.
- ☐ Success/issue escalation points and rhythm (wash ups/retros/PCAs)

4 Other client teams – IT, Finance, Procurement, Operations, Commercial, Sales, Trading

Key people in each team, for example:

- ☐ IT – process for getting new agency people access to the intranet and asset management transfer arrangements
- ☐ Finance – accounts payable contact(s)
- ☐ Procurement – fee reconciliation contact(s) and contract lead
- ☐ Sales/Commercial/Trading – main commercial goals and objectives for coming year and key events/meetings; branch details and contacts (where appropriate)
- ☐ High level process maps and interaction points with marketing
- ☐ Marketing Business Partner or main point of contact
- ☐ Contact details (title, e-mail, mobile and photo)

5 New Agency (core team) contact list

- ☐ By individual, team, reporting lines and location
- ☐ By scope of work
- ☐ By sign off limits and responsibilities
- ☐ All available biog materials, team biogs and photos
- ☐ Contact details (title, e-mail, mobile, WhatsApp group etc.)

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6 New Agency structure chart

- ☐ By team, reporting lines, location, FTE for this account
- ☐ Board or most senior directors (including biogs, photos, contact details)
- ☐ By other departments (IT, Production, Project Management etc.)

7 New Agency Internal Meeting infrastructure

- ☐ By attendees, objectives, frequency
- ☐ By outputs and reporting lines (into other meetings)
- ☐ Including details on agency led projects (status meetings, reporting, process, assets management, research agenda, development agenda, ways of working)
- ☐ Success/issue escalation points and rhythm (wash ups/retros/PCAs)

8 Other agencies

- ☐ Name, main contacts and location
- ☐ Role and scope of work
- ☐ Length of time worked with the client
- ☐ Current objectives
- ☐ Main contacts (role, title, % dedicated to the account, length of time at the agency, length of time on the client's business, main interface within the client team)
- ☐ Main contact details (e-mail, phone, mobile, home if appropriate, biogs and photos)
- ☐ Regular meetings where this agency will attend (with new agency)
- ☐ Key contact for "getting up to speed" and agree if induction meeting needed for new agency

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9 Other client partners (Data, Distribution, Research, Management Consultants, Tech etc.)

- ☐ Name, main contacts and location
- ☐ Role and scope of work
- ☐ Length of time worked with the client
- ☐ Current objectives
- ☐ Main contacts (role, title, % dedicated to the account, length of time on the client's business, main interface within the client team)
- ☐ Main contact details (e-mail, phone, mobile, biogs and photos)
- ☐ Key contact for "getting up to speed" and induction meetings for new agency where appropriate

10 Financial Processes and set up

- ☐ Set up process for new agency
- ☐ PO approach and detailed invoicing instructions
- ☐ Travel and entertainment policy
- ☐ Payment timings (expected and monitoring)
- ☐ Finance team (agency and client) mapping

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 30 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

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