Transition - AAR Good Housekeeping checklist

A simple checklist that helps both client and agency team set up the relationship quickly and covers a few things that often get forgotten in the haste to get on with the job. The focus is on people, communication and related working practices. This should supplement the client and agencies own specific approach and needs, or act as the agenda for the initial working practice session or as a final checklist.

	People checklist	Action	Done
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 ▪ All available biog materials and photo ▪ Contact details (title, e-mail, mobile, home if appropriate)		
2	**Client structure chart** ▪ By team, reporting lines, location ▪ Board or most senior directors (including any available biog materials and photo, contact details)		
3	**Client meeting infrastructure** ▪ By attendees, objectives, frequency ▪ By outputs and reporting lines (into other meetings) ▪ Including details on who chairs, sets the agenda, takes the minutes etc		
4	**Client Non Marketing teams – IT, Finance, Procurement, Operations, Sales** ▪ Key people in each team ▪ For example IT – process for getting new agency people access to the intranet and asset management transfer arrangements ▪ For example Finance – accounts payable contact(s) ▪ For example Procurement – fee reconciliation contact(s) and contract lead ▪ For example Sales – 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)		

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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 and photo ▪ Contact details (title, e-mail, mobile, home if appropriate)		
6	**New Agency structure chart** ▪ By team, reporting lines, location, FTE for this account ▪ Board or most senior directors (including any available biog materials and photo, contact details) ▪ By other departments (IT, Production, Project Management etc)		
7	**New Agency Internal Meeting infra-structure** ▪ By attendees, objectives, frequency ▪ By outputs and reporting lines (into other meetings) ▪ Including details on agency led projects (process, assets management, research agenda, development agenda)		
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 clients business, main interface within the client team) ▪ Main contact details (e-mail, phone, mobile, home if appropriate, photo and mini biog) ▪ 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		
9	**Other client partners (Data, Distribution, Research, Management Consultants 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 clients business, main interface within the client team) ▪ Main contact details (e-mail, phone, mobile, photo and mini biog) ▪ 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 instructions for the client on how/what they need to do especially with the first few invoices ▪ PO approach and detailed instructions for the agency on how/what they need to do when present their first few invoices ▪ Travel and entertainment policy ▪ Payments timings (expected and monitoring) ▪ Finance team (agency and client) mapping ▪ Issues escalation points and timings		