**Full-Service Account Transition Checklist**

AGENCY aims to make the transition of CLIENT’S business as smooth as possible. Our Transition Team will help manage all the various elements of a successful transition. This will allow your core agency team to focus on keeping your business moving forward without interruption.

The Transition Team will address the following, and any other necessary items:

* Contract/MSA finalization
* Billing and payment operational specifics/processes
* Data and other security standards and implementation
* Data audit and transfer, as applicable
* Media letters as needed
* Creative asset audit and identification
* Understanding the status of all plans and of current and future commitments
* Understanding all talent-related contracts and commitments

**Transition Checklist**

**Overall**

* Confirm official start date and understand previous agency contract obligations and limitations
* Finalize MSA/contract and all relevant documents, including data security agreements, etc.
* Transition digital files and necessary paperwork from previous agency
* Historical & current creative assets
* Historical & current media plans
* Target segmentation data
* Audience analyses
* Media buy authorizations, as appropriate
* Current search data
* Historical POVs
* Data
* Analytics & reporting
* Planning responsibilities
* Negotiating & buying responsibilities
* Establish billing turnover date
* Establish bill-pay process
* Develop technology solutions in collaboration with CLIENT to automate workflow, as necessary
* Facilitate media and other partner change in agency communication
	+ Agency will work with CLIENT to communicate the effective date of new assignment to all media and other vendors
	+ Letter should be on CLIENT letterhead
	+ Agency will distribute to all appropriate vendors
* Agency to establish any needed credit requirements with production, media, data and other partners

**Media-Related**

* Transition Broadcast
	+ Buying and program guidelines and restrictions
	+ Review upfront vs. scatter status of national TV buy
	+ Copies of current year contracts including unit rates and rating estimates
	+ Transfer/input into book/bill/pay system
	+ Detail of pending or active buys & immediate buys
	+ Projected cost-per-points for current year, as necessary
	+ Added-value: placed and to be placed
	+ Identify special buys: sponsorships, corporate commitments, licensing agreements, special deals including multi-year, multi-media, etc.
	+ Historical buys, buy input and posts
	+ Outstanding ADU’s, make-goods to be placed
	+ Establish traffic procedures and reports
	+ Conduct local market overviews (if applicable)
* Transition Print
* Copies of current year buys
* Detail of pending/active buys
* Copies of current year contracts
* Contract fulfillment, paging and short-rate status
* Identify special buys/needs: sponsorships, corporate commitments, licensing agreements, special deals including multi-year deals, multi-media, etc.
* Copies of prior years’ buys
* Positioning and content guidelines review
* Circulation audits
* Transition Digital
	+ Copies of current year buys and contracts
	+ Detail of pending or active buys and contracts
	+ On-board live buys
	+ Added-value summary: placed and to be placed
	+ Identify special buys/needs: sponsorships, corporate commitments, licensing agreements, special deals including multi-year deals, multi-media, etc.
	+ Historical buys and performance analysis
	+ Identify desired post-click activities
	+ Identify methodology for tracking post-click activities
	+ Agency terms (not already in place) to be completed with any media partners
	+ Metrics workshop
		- Review of campaign performance results
		- Define key metrics and KPIs
		- Define tracking and measurement scope of work (data collection/aggregation needs, system integration, data matching, etc.)
* Transition Out-of-Home
	+ Copies of current year buys and contracts
	+ Existing site location maps
	+ Detail of pending or active buys and contracts
	+ Added-value summary: placed and to be placed
	+ Identify special buys/needs: sponsorships, corporate commitments, licensing agreements, special deals including multi-year deals, multi-media, franchise positions, city ordinance specifics, etc.
	+ Historical buys and performance analysis
	+ Status of posting reports and market rides/audits
	+ Site selection guidance

**Creative-Related**

* Transition Creative Assets
	+ List and transfer all historical and current creative files/materials – digital and physical
	+ Identify location(s)/transfer all masters and versions for broadcast work
	+ Identify location(s)/transfer all original and retouched artwork
* Transition Talent Responsibilities
	+ Transfer talent payment details including talent reports for each broadcast unit and cycle dates (if applicable)
	+ Transfer of rights from previous agency to new agency
	+ Notify unions of transfer
* Transition Traffic
	+ Confirm traffic turnover date
	+ Transfer commercial ISCI code records
	+ Identify current broadcast duplication vendor
	+ Obtain current trafficking instructions and client policies