Media Services Transition Checklist

Changing your media agency can be perceived as overwhelming. This outline provides a checklist by which to track the various tasks associated with such a transition.

Over-communication is key!

Experience has proven that assigning a transition team at the agency should be the first step. This transition team will be tasked with discovery — meaning collecting all relevant information from **CLIENT** and your vendors. This includes current processes, active assignments, roles and responsibilities across media and marketing, goals, previous results. We facilitate vendor communication and collect overall requirements. A transition team will be provided in all necessary geographies.

With the transition team at work on-boarding the business, your core agency team can focus on your business.

**First 30 Days**

* **Immediately assemble the transition teams for various geographies and media channels. Set transition timeline in collaboration with CLIENT**
* **Align on assignments and success metrics**
* Communication objectives
* High level communication flowcharts
* Strategic imperatives
* KPI’s
* Roles and responsibilities
* Savings/value objective
* **Electronically share files**
* Historical and current media plans
* Target audience analysis
* Strategy presentations
* Competitive information
* **Develop technology solutions in collaboration with CLIENT to automate workflow**
* **Transition with current agencies if applicable in all necessary geographies**
* Planning responsibilities
* Negotiating & buying responsibilities
* Billing turnover date
* Establish bill-pay process

**First 60 Days**

* **Metrics Workshop**
* Review of historical campaign performance results, define key conversion events, establish metric goals, etc.
* Define tracking and measurement scope of work (data collection needs, definition of Web pages to be tracked, system integrations, any data matching, etc.)
* **Geographic Coordination**
* Weekly calls / teleconferences
* Weekly / bi-weekly status report review
* **CLIENT and AGENCY representatives visit key geographies, as appropriate, to review transition status**
* **Bring agreed technology solutions online**
* Load historical media data
* Introduce relevant CLIENT data
* Sync with relevant existing visualization technologies

**First 30 Days – Media Partners**

* **Transition Television buys**
* Buying and program guidelines and restrictions
* Sales rep contact lists
* Copies of current year contracts including unit rates and rating estimates, re-confirmed by stations
* Transfer/input into the relevant local system
* Detail of pending or active buys & immediate buy transfer to **AGENCY**
* Projected cost-per-points for current year
* Added-value properties: placed and to be placed
* Identification of special buys: sponsorships, corporate commitments, licensing agreements, grandfather deals, multi-year deals, multi-media, etc.
* Historical buys, buy input and posts
* Outstanding ADU’s, make-goods to be placed
* Establish traffic procedures and reports
* **AGENCY** to establish any credit requirements with partners
* **Transition Radio buys**
* Follow the same steps as detailed in the Television transition
* **Transition Magazine**
* Letters to publishers from client advising agency change and effective date (**AGENCY** to provide draft)
* List of current primary sales contact representatives
* Copies of current year buys
* Detail of pending or active buys
* Copies of current year print contracts– Contract fulfillment, paging and short-rate status
* Identification of special buys/needs: sponsorships, corporate commitments, licensing agreements, grandfather deals, multi-year deals, multi-channel
* Historical buys & positioning and content guidelines review
* Status of circulation audits
* **AGENCY** to establish any credit requirements with partners
* **Establish digital terms**
* Copies of current year buys and contracts
* Detail of pending or active buys and contracts
* Added-value summary: placed and to be placed
* Identification of special buys: corporate commitments, grandfather deals, multi-year deals, multi-media, franchise positions, 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 partners
* **Transition outdoor plans**
* Copies of current year buys and contracts
* Existing site location maps
* Detail of pending or active buys and contracts
* Transfer/input into the relevant local system
* Added-value summary: placed and to be placed
* Identification of special buys: corporate commitments, grandfather deals, multi-year deals, multi-media, franchise positions, city ordinance details, etc.
* Historical buys and performance analysis
* Status of posting reports and market rides/audits
* Traffic and site location selection guidelines
* Establish traffic procedures
* **AGENCY** to establish any credit requirements with partners

**First 30-60 Days – Media Partners**

* **Digital Transition**
* Transition live buys (display & search)
* **CLIENT** to cancel IOs; cancellation windows are typically 30 days or less (unless it is custom digital work)
* **AGENCY** to re-issue IOs to keep desired online media and search media live
* **Search Transition**
* Acquire vendor account IDs for key publishers (Google, Yahoo, etc.)
* Define tracking requirements and linking strategy/landing pages
* Architect search campaigns to meet objectives