

Kick-Off/Transition **Input** Form

DATE	<<Xxxxx, xx 20xx >>	CLIENT	<< Xxxxxx xxxxxx >>
VERSION	<<x.x>>	PROJECT	Kick-Off/ Transition

1-Overview	Answer/Comments
Describe the program being considered.	
What are the organization's business objectives related the product or service associated with this program?	
<p>What are the key performance indicators (KPIs) or specific measures of success from a business perspective?</p> <p>(e.g. number of new customers, increase in average purchase size, increase share of wallet, reduction in customer attrition, etc.)?</p>	
What are the current benchmark metrics as they relate to measures of success mentioned above?	
<p>Describe any internal/external risks or impediments that exist within the project timeframe.</p> <p>(e.g. key personnel or technical environment changes, key decisions pending, regulatory changes)</p>	
<p>List the key stakeholders and their roles/responsibilities in the organization and on this project.</p> <p>(e.g. being informed of status, reviewing status, commenting on status & deliverables, approving deliverables)</p>	

Kick-Off/Transition **Input** Form

DATE	<<Xxxxx, xx 20xx >>	CLIENT	<< Xxxxxx xxxxxx >>
VERSION	<<x.x>>	PROJECT	Kick-Off/ Transition

2-The Target	Answer/Comments
Who are your key target audiences in order of importance, described demographically and/or in terms of behavioral distinction?	
Do you have preferred research sources for internal reporting or agency integration purposes? (e.g. Nielsen v ComScore...)	
Describe your target further, demographically & psychographically if needed	
Describe key motivators or impediments for using your product or service?	
Describe known opportunities or motivations (e.g. cyclical purchase imperatives, health needs) or impediments (e.g. age restriction, inadequate financing) that are internal or external to these targets	
What do you want them to think/feel as a result of interacting with you brand?	

Kick-Off/Transition **Input** Form

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VERSION	<<x.x>>	PROJECT	Kick-Off/ Transition

3-The Product/Service	Answer/Comments
<p>What is the product or service and any relevant history/background?</p>	
<p>What are the product's internal differentiating characteristics or points of distinction?</p> <p>Positive (scalable)? Negative (approval process)?</p>	
<p>What are the product's external differentiating characteristics or points of distinction?</p> <p>Positive (customer service)? Negative (high price)?</p>	
<p>How do you overcome or leverage these distinctions to consumers?</p>	
<p>List, in priority order, the sources of traffic to your web site, stores, call centers, customer reps, etc as well as any unrealized potential.</p>	
<p>Describe any major, non-competitive obstacles.(see section 5 for competitive)</p>	

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DATE	<<XXXX, xx 20xx >>	CLIENT	<< XXXXXX XXXXXX >>
VERSION	<<x.x>>	PROJECT	Kick-Off/ Transition

4-Branding & Creative Assets	Answer/Comments
Describe your brand essence and note any discrete offline or online-specific aspects.	
Describe any common misconceptions or areas where the brand perception has not been fully realized.	
Describe the level of internal consensus over key brand & style characteristics?	
Are there published brand and style guidelines for use online including logo usage, color palettes, editorial tone and style guides?	
What assets are available to the agency? Highlight & Comment about those, which are most relevant to this initiative.	

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DATE	<<XXXX, xx 20xx >>	CLIENT	<< XXXXXX XXXXXX >>
VERSION	<<x.x>>	PROJECT	Kick-Off/ Transition

5-The Market / Competition	Answer/Comments
Summarize the findings of any recent / relevant primary research (usability or focus group testing, surveys, etc.) that has been conducted?	
Describe any key information you feel is missing from our understanding of your product or service as it relates to the objectives stated in this document.	
Summarize any key secondary research or insights that you have encountered that will shed light on the issues your company faces.	
List your major competitors and their points of distinction (e.g. product/ service superiority, marketing superiority) in order of importance?	
Describe any major market changes, their anticipated impact and your organization's plans.	

Kick-Off/Transition **Input** Form

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VERSION	<<x.x>>	PROJECT	Kick-Off/ Transition

6-Marketing & Advertising Efforts	Answer/Comments
Describe any relevant past and current marketing and advertising initiatives (objectives, response, channels used, efficacy)?	
Describe the relationship of the creative to other materials in the market place including other channels, web sites, PR, social networking, etc.	
How are these initiatives measured?	
Describe future programs planned.	

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7-Technical Parameters	Answer/Comments
Describe your technical environment including dev, staging and production.	
Describe your key technology supplier arrangements e.g. current hosting arrangement, etc	
Describe your security parameters.	
Do you expect to engage in any data capture or analysis? If so, describe (e.g. database employed)?	
List key hardware and software planned or already deployed.	
Describe relationships with any third parties. Who are the contacts at that organization and their roles?	

Kick-Off/Transition **Input** Form

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VERSION	<<x.x>>	PROJECT	Kick-Off/ Transition

8-Operations	Answer/Comments
Describe your preferred format and other considerations for presentations and reviews.	
What are the roles and hierarchy of reviewer and approvers?	
Describe the involvement department within your organization (e.g. brand, legal, etc.) and their role and requirements in reviews (check-in during preliminary rounds, comprehensive reviews using printouts of all materials in final rounds, durations needed for review)	
Describe the procedures for arranging for conference rooms at your facility.	
Describe, as a whole, your company's preferred working hours and preferences for meetings that do not occur during non-business hours.	
Are there any key team members who will not be available during the projected duration of this project?	
What is the standard configuration of computers for your team including connection speed, browsers, email and calendar programs, etc.	

Kick-Off/Transition **Input** Form

DATE	<<Xxxxx, xx 20xx >>	CLIENT	<< Xxxxxx xxxxxx >>
VERSION	<<x.x>>	PROJECT	Kick-Off/ Transition

9-Paid Media Investments	Answer/Comments

Kick-Off/Transition **Input** Form

DATE	<<Xxxxx, xx 20xx >>	CLIENT	<< Xxxxxx xxxxxx >>
VERSION	<<x.x>>	PROJECT	Kick-Off/ Transition

10-Other (As appropriate)	Answer/Comments
Social Media platforms	
Sales promotion events/cycles	
Etc	