{Sales Team – Make a copy of this doc and save to the Client-specific folder in the "Clients" folder in Box}

{CLIENT NAME}

Client Handoff Brief

Purpose

This Client Handoff Brief captures key insights, decisions, and context gathered by Business Development during the sales and onboarding process. Its goal is to ensure a smooth transition to the Partner Success team by providing a clear understanding of the client's business, goals, expectations, and agreed-upon scope—so we can deliver effectively from day one.

Last Step and Next Steps:

Where did you leave this with the client? (i.e. we presented capabilities)

What are the next steps with the client? What Action items do we have outstanding? (i.e. we need to put together a media recommendation)

How Far into Media Planning did you get?

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1. Client Overview

Primary Contact(s): (Name, Title, Email, Phone)
Secondary Contact(s):
Decision Maker:
Industry / Vertical:

Website(s):
Key Markets / Locations Served:

Brief Business Description:
(What they do, who they serve, and how they make money)

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2. Engagement Snapshot

Services Sold:
☐ Programmatic
☐ Traditional Media
☐ Creative Services
☐ 1st Party Audience
☐ Other_____

Start Date:
Initial Term / Flight Dates:
Estimated Monthly / Campaign Budget:
Billing Structure: (campaign-based, billing in arrears, fee-only billing, Purchase Order Net 30, etc.)

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3. Client Goals & Success Metrics

Primary Business Goals:
(e.g., lead generation, foot traffic, brand awareness, ecommerce sales)

Marketing Objectives:
(e.g., increase qualified leads, improve ROAS, expand into new markets)

KPIs Discussed:
☐ Conversions / Leads
☐ CPA / CPL
☐ ROAS
☐ Impressions / Reach
☐ Foot Traffic
☐ Other: _____

Definition of Success (Client's Words):
(Important: capture phrasing used by the client)

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4. Target Audience Insights

Primary Audience(s):
(Demographics, psychographics, behaviors, intent signals)

Secondary / Niche Audiences:

Geographic Targeting:

Audience Pain Points / Motivators Identified:

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5. Messaging & Brand Considerations

Core Value Proposition Discussed:

Key Messages to Emphasize:

Brand Voice / Tone:
(e.g., professional, approachable, bold, local, luxury)

Creative Preferences:
☐ Static
☐ Video
☐ Audio
☐ Native / Rich Media

Brand Restrictions or Guardrails:
(e.g., compliance, legal review, brand safety concerns)

Brand Guidelines Provided?

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6. Media & Channel Strategy (As Sold)

Channels Included:
☐ Display
☐ CTV / OTT
☐ Audio
☐ Native
☐ Search

☐ Social
☐ Traditional (TV, Radio, OOH, Print)

Rationale Shared with Client:
(Why these channels were recommended)

Competitive Conquesting:
Competitors named: _____

7. Other Ancillary Services (As Sold)

Channels Included:
☐ Creative Services
☐ Audience Anaysis
☐ Analytics
☐ Other:_____

Rationale Shared with Client:
(Why these services were recommended)

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8. Competitive & Market Context

Key Competitors Discussed:

Client's Perceived Competitive Advantage:

Known Market Challenges:
(e.g., seasonality, saturation, long sales cycles)

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9. Sales Process Notes & Context

Why They Chose Us:
(Important differentiators or moments that closed the deal)

Objections Raised (and How They Were Addressed):

Client Concerns to Be Mindful Of:

Past Agency Experience (If Shared):

10. Final Notes from Business Development

(Anything not captured above that would help Partner Success build trust, manage expectations, or avoid surprises)

11. Onboarding & Communication Expectations

Preferred Communication Style:
☐ Email
☐ Calls

Meeting Cadence Discussed:
(e.g., weekly check-ins, monthly reporting)

Reporting Expectations:
(Level of detail, format preferences)

Internal Approval Process:
(Who signs off on creative, budgets, optimizations)

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12. Assets & Access

Assets Promised by Client:
☐ Brand Guidelines
☐ Creative Files
☐ Logos
☐ Website Access
☐ Analytics Access
☐ CRM / Offline Data

Known Gaps or Risks:
(e.g., no conversion tracking, outdated creative)

13. Upsell / Future Opportunities Identified

Potential Future Services:

Triggers for Expansion:
(e.g., performance benchmarks, seasonal push)

Completed By:
Date: