TWSC

Getting the best from our teams

The Weber Shandwick Collective X PARTNER

OUR PROMISE

To make business more human.

The Weber Shandwick Collective

OUR VALUES

CURIOSITY
We cultivate curiosity and challenge convention. Because solving any problem begins by asking the right questions.

INCLUSION
We foster teams and environments built on belonging and openness to possibility. Because the best ideas have no bias.

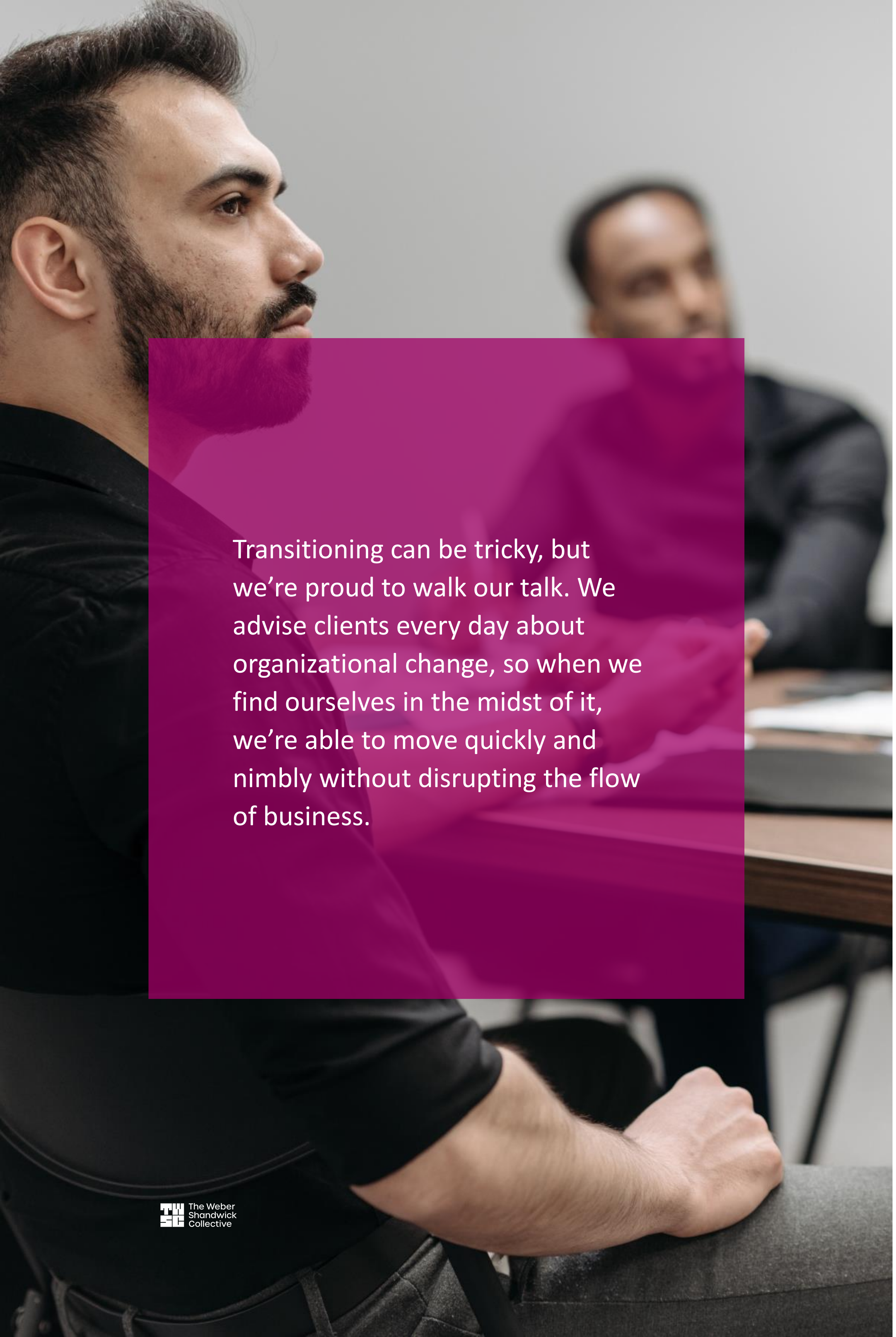
COURAGE
We stand up for what we believe in. Because being comfortable with the uncomfortable is how progress is made.

IMPACT
We strive to make a meaningful difference in everything we do. Because we owe it to our people, our clients and the world.

KICKING OFF OUR WORK TOGETHER

How we'll navigate a seamless agency transition

The Weber Shandwick Collective



Transitioning can be tricky, but we’re proud to walk our talk. We advise clients every day about organizational change, so when we find ourselves in the midst of it, we’re able to move quickly and nimbly without disrupting the flow of business.

OUR PRINCIPLES
for a successful transition:

- Set the foundation for a partnership that leads to measurable success and award-winning work.
- Foster strong relationships between all members of the team.
- Create a culture of open-minded collaboration that allows all capabilities and partners to elevate one another.
- Define all lines of communication, roles and responsibilities between your legacy agencies, your team and our team.
- Introduce each other to our processes and determine opportunities for improvements and efficiencies.

KICKING OFF THE TRANSITION
Recommended approach

ALIGN
(start strong)

On our first day of work together, we'll kick things off by ensuring we:

- Introduce all team members, provide contact lists.
- Outline and agree upon key roles and responsibilities between our teams.
- Discuss best ways of sharing information (platform, channel, etc.).
- Set up clear paths of communication, establish meeting cadence.
- Discuss upcoming milestones and timelines.
- Begin understanding of current agency work to be transitioned (consider stop/start/continue format).
- Identify immediate project needs and timing (beyond what was already discussed).
- Finalize KPIs and scope and provide accounting and/or billing instructions.

IMMERSE
(get smart quickly)

In conjunction with or immediately following our alignment activities, we will:

- Provide relevant CLIENT overview/background materials to our team (history, structure, performance, business priorities, strategic roadmaps, etc.).
- Hold relevant immersion sessions (virtual or in person in each region) for our team to review strategies, planning process, team priorities, existing research, past campaigns and results, other materials as needed.
- Provide our team access to any platforms used for communication or business needs (e.g., intranet).

HANDOFF
(transition seamlessly)

Within the first few weeks of work together, we'll want to understand the transition details and get involved in the right way with work (whether active, in plans, or sunsetting).

- Connect our team to other agency partners, as needed.
- Finalize transition/handoff timeline with roles and responsibilities clearly defined through transition.
- Hold relevant transition sessions for our team, in partnership with your existing agencies, to review:
  - Current work underway.
  - Relevant documents and materials.
  - Plans in progress or in place.
  - Other helpful WOW information.
- Review core materials provided.
- Define participants in already-established meetings to get the TWSC team up to speed as needed; take over existing and create new meeting series as appropriate within ongoing workstreams.

ACTIVATE
(get to work!)

The activate stage will happen in parallel with immersion and handoff to ensure business continuity and support for near-term deliverables and work underway.

- Kick off new workstreams, including research, strategy/creative and planning, including briefing relevant teams as needed.
- Begin using new tools and processes defined in "Align" stage.
- Begin holistic planning process.
- Engage additional team members and offices as needed.

MAKING IT REAL

Sample kickoff checklist for a new client engagement

The Weber Shandwick Collective

CLIENT | ENSURING WE DELIVER MAXIMUM IMPACT.

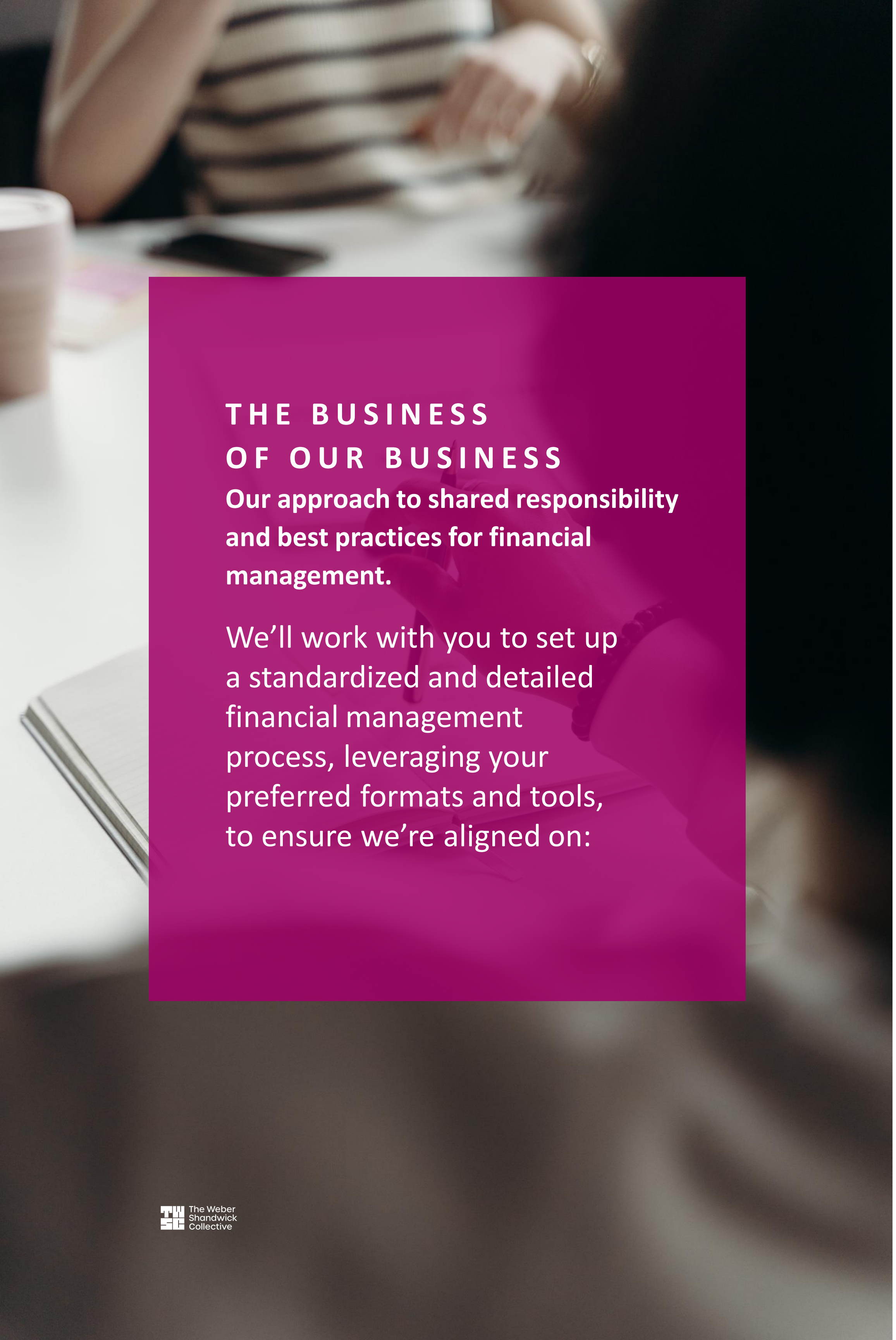
- Discuss current understanding of existing work client has with other agencies and transition plans in place, how our team will support and capabilities needed to execute.
- Walk through the proposal and scope, and provide a brief overview of the challenge and what we recommended. What are the key deliverables? Why did the client pick us? What is the client excited about?
- What key clients are involved?
- What is exciting about the project to you? Rally the team around a particular aspect.

TEAM | SHOWING UP AS OUR BEST HUMAN SELVES.

- Clarify roles on the project: Who is responsible for what? What are the expectations of each roles?
- Discuss working and communication styles. For example, has the team shared its working/personality style assessment results (i.e., DiSC assessment, Enneagram) or Gives, Gets and Ghastlies, round-robin style:
  - Gives: What do I want to contribute to this project? What unique skills can I bring to supercharge our deliverables? What helps me bring my best work to the table?
  - Gets: What do I want to learn on this project? What is a stretch area I'm hoping to optimize my performance in? How can the team support the achievement of that goal?
  - Ghastlies: What gets in the way of me being my best and delivering my best work?
- Align on optimal communication styles and channels (email, Teams instant messaging, hopping on a quick call, etc.)
- [If applicable] Who are the agency partners we'll be working alongside? What workstreams or elements do we expect to respectively own?
- Is there an opportunity to train newer members of the team on certain tools or aspects of our offerings? Are there people from other parts of the business that could offer their expertise in skilling up the team?

OPERATIONS | GETTING ORGANIZED AND ALIGNED.

- Align start date, key milestones, meeting dates, deliverables and end date.
- Align on staffing plan and allocations: Does each team member know how much time they're expected to spend on this project each week/month?
- Align on internal and external touchpoints (who should join these, how frequently should they be set up, what are the expectations for these touch points?)
- Flag any staffing concerns.
- Be sure to double-check team schedules so we can plan for appropriate coverage in advance.



THE BUSINESS OF OUR BUSINESS

Our approach to shared responsibility and best practices for financial management.

We'll work with you to set up a standardized and detailed financial management process, leveraging your preferred formats and tools, to ensure we're aligned on:

"FINANCIAL RULES OF ENGAGEMENT"

Establish a mutually agreed upon set of guidelines to prioritize the financial health of the relationship. In alignment with parameters set in the contract, the "Rules of Engagement" will address the spirit of how we agree to approach potential issues to protect both parties, share risk and responsibility and keep our teams focused on delivering results. Potential rules may outline timeline for delivery of scopes, parameters around requesting new work and more.

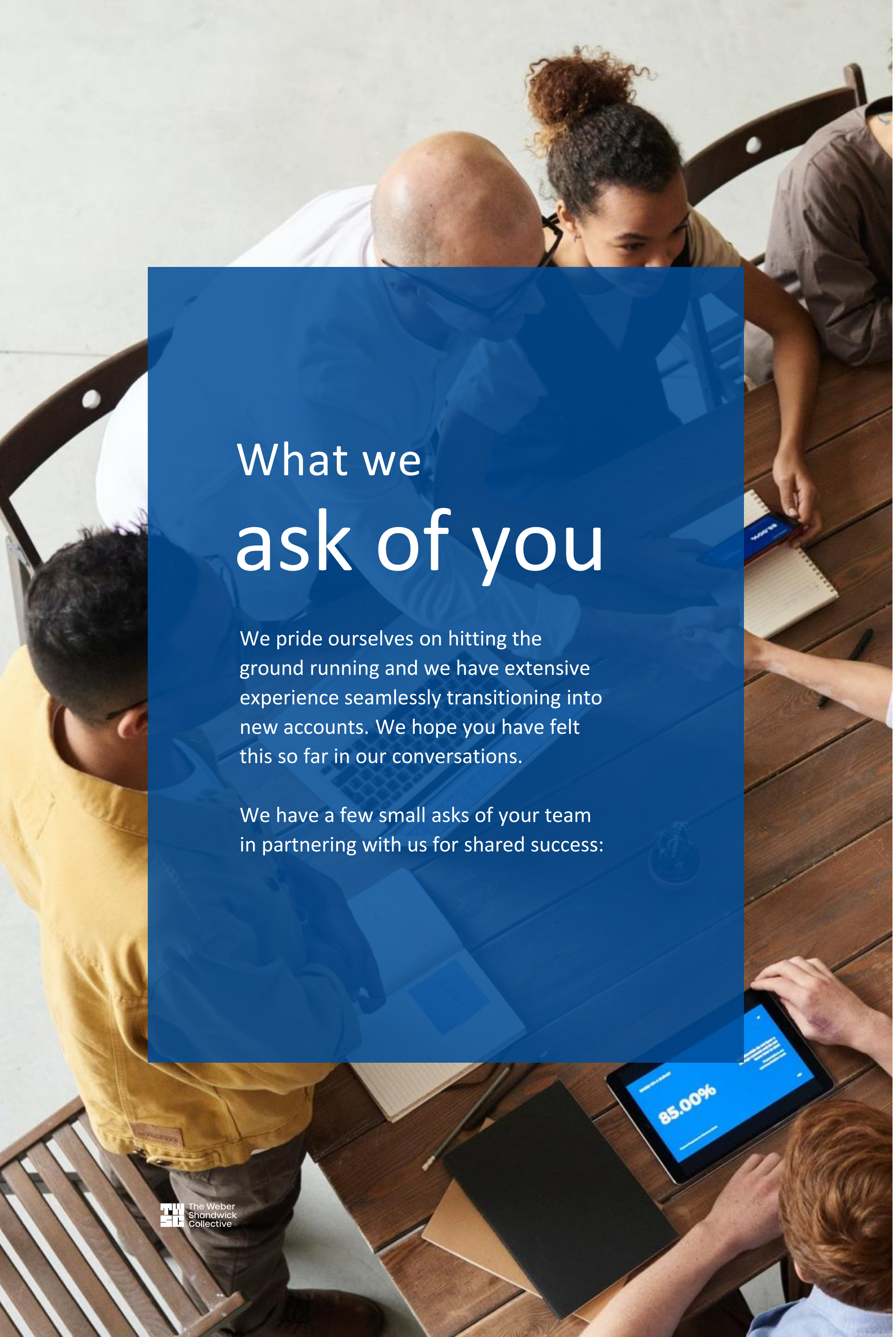
MONTHLY FINANCIAL HEALTH CHECKS

We will institute monthly meetings to review progress against all SOWs, assess work completed against all SOWs, and discuss any potential issues on the horizon related to deliverables, budget and planned impact of each SOW.

STANDARDIZED SOW, PROJECT TRACKING AND REPORTING MODELS

To ensure consistency we will work with you to develop a standardized approach to:

- SOWs: We'll work with you to develop a standardized SOW template, agreed upon by Weber Shandwick and CLIENT including a clearly defined change order process to provide a system to manage the work and new requests or scope changes that allow us to deliver quality results with speed, while staying on budget (any change in project scope is to be clearly documented, agreed upon in writing).
- Project Trackers: We will create and disseminate a template project tracker to ensure the team is holding themselves accountable to the same standards of account management on a day-to-day and week-to-week basis.
- Monthly Reports: We will implement a standardized template for monthly activity reports to accompany regular invoices (determined based on final SOW).



What we ask of you

We pride ourselves on hitting the ground running and we have extensive experience seamlessly transitioning into new accounts. We hope you have felt this so far in our conversations.

We have a few small asks of your team in partnering with us for shared success:

CANDOR

Please be open with us and provide the complete picture, including the "warts." Transparency will help us give you our best thinking and counsel.

HONEST FEEDBACK

Please don't hesitate to share when our efforts are delivering and are "on the mark" and, perhaps more importantly, when they are not meeting your expectations. We want to know so we can ensure we're delivering for you — and we promise to do the same.

CLARITY

Provide clear direction to ensure we're able to meet expectations. What are your expectations? Do we have consensus on the desired results of the program? Have you shared all the information we need to do our job? What are the desired budget parameters?

ACCESS

The more access we have to you, your teams, your leaders and helpful information, the better we can understand the task at hand and deliver great work.

Thank you!

We're incredibly excited about the opportunity to partner with the CLIENT team to drive visibility and engagement among the team.