



Allianz  | **OMG**

Transition Playbook

14TH SEPTEMBER 2023

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In this document, you can find our approach to:

Capturing and processing historical data and information, transferring legacy contracts from media partners, staffing teams, kicking-off of new campaigns, executing planned but not activated campaigns, adopting and implementing proprietary technology, migrating and accessing all 3rd party buying platforms, onboarding and creating new processes.

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01

Seamless Transition

Step-by-Step Process for
Transferring Accounts, Campaigns,
and Reporting Responsibilities





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‘While in many ways the OMG Global experiment has just begun, I wanted to take a moment and acknowledge the astounding feat from both sides to transition and launch on time (with little wiggle room). The campaign launch tracker document really speaks to the level of rigor that goes into this. On to Global Transformation.’

– **Matthew Karson,**

Media Director
Marketing Transformation,
The Clorox Company



“

‘We wanted a best in class business partner who had the talent, capabilities and the right mindset who could go on this journey with us, and from day one the process didn’t feel like a separate client and agency dynamic but one team working hand in hand. This was the core reason why we could deliver the milestones planned.’

– **Bettina Fetzer**

Vice President Marketing &
Communications,
Mercedes Benz AG





Our Transition Guarantee

FAST, STREAMLINED AND RISK-FREE TRANSITION

WE EMBRACE COMPLEXITY

Our transition practice is built upon the highest-level of accountability, embracing complexity and reducing burden for Allianz. Our dedicated transition team is confident in managing scaled business operations, given our wealth of experience with clients that operate with significant volume and velocity. As your first day-to-day touchpoint with OMG, it is our job to wrangle and simplify - delivering a dynamic, action oriented, and seamless transition experience.

WE PROVIDE A HIGH-TOUCH EXPERIENCE


Our transition capability and high-quality service level confirms explicit remit for expeditious collection, organisation, and understanding of your detailed business requirements. We immerse ourselves in your business, rolling up our sleeves to dive deep into Allianz technology, data, and material information. Our hands-on talent orientation and relentless focus on detail enables us to quickly understand and seamlessly align specialist capabilities to Allianz and the functions the incumbent currently manages. Our operations and dedicated transition team will be overseen by OMG Executive Leadership, confirming executive stewardship and the highest-level of accountability throughout the hierarchy of the organisation.

WE CONFIRM NO DISRUPTIONS TO BUSINESS AS USUAL

Our transition team's core function is to transition the business, with no disruptions to business as usual. This minimises risk and delivers capability that provides both consistency and excellence in service. OMG will build the Transition team with hand-picked experts from within the Omnicom Network, ready to be immersed in the transition from Day 1. Our team ensures a constant presence providing a frictionless, direct-route for Allianz communications. There will be no impact or disruptions to business as usual as we onboard our new model.

WE ARE EXCITED TO CO-CREATE THE FUTURE WITH YOU

We have enjoyed our partnership throughout the work we currently do with you and over the course of this pitch process. We are looking forward to continued learning and business immersion with you, as we embark on a partnership that will take us into the future, co-creating what's next!

 <p>Transition Team Operational Day 1</p> <hr/> <p>20+ Specialist SWAT Team Provided at-gratis</p>	 <p>Best-in-Class Transition Utilities</p> <hr/> <p>20+ Proven Project Management, Data Transfer & Talent Management Tools</p>	 <p>Historical Data Preservation</p> <hr/> <p>100% Seamless Data Integration, Extraction and Consolidation</p>	 <p>Completed Exponentially, No Disruptions</p> <hr/> <p>6 Weeks Full Final Transition in 6 Weeks for Tranche 1 markets</p>
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Full Transparency

← Clear, Accountable Measures Ensure Collective Success →



Your Transition Team

Your Global Transition Leads



Blake Cuthbert
Global Executive Leadership



Nitya Varma
Global Transition Lead



Akguen Karakas
Global Business Lead

01. Commercials	02. Investment	03. MSA	04. Media & Campaign Planning	05. Data & Tech	06. Talent	07. Onboarding & Exit
Rakhi Datta Finance Lead	Jonathan Burrill Investment Lead	Marie Marcoux Legal Lead	Andrew Raymond Media Campaign & Planning Lead	Miles Pritchard Data & Tech Lead	Kate King Talent Lead	Sabina Tayabali Onboarding & Exit Lead

Your Local Transition Team Leads – Tranche 1

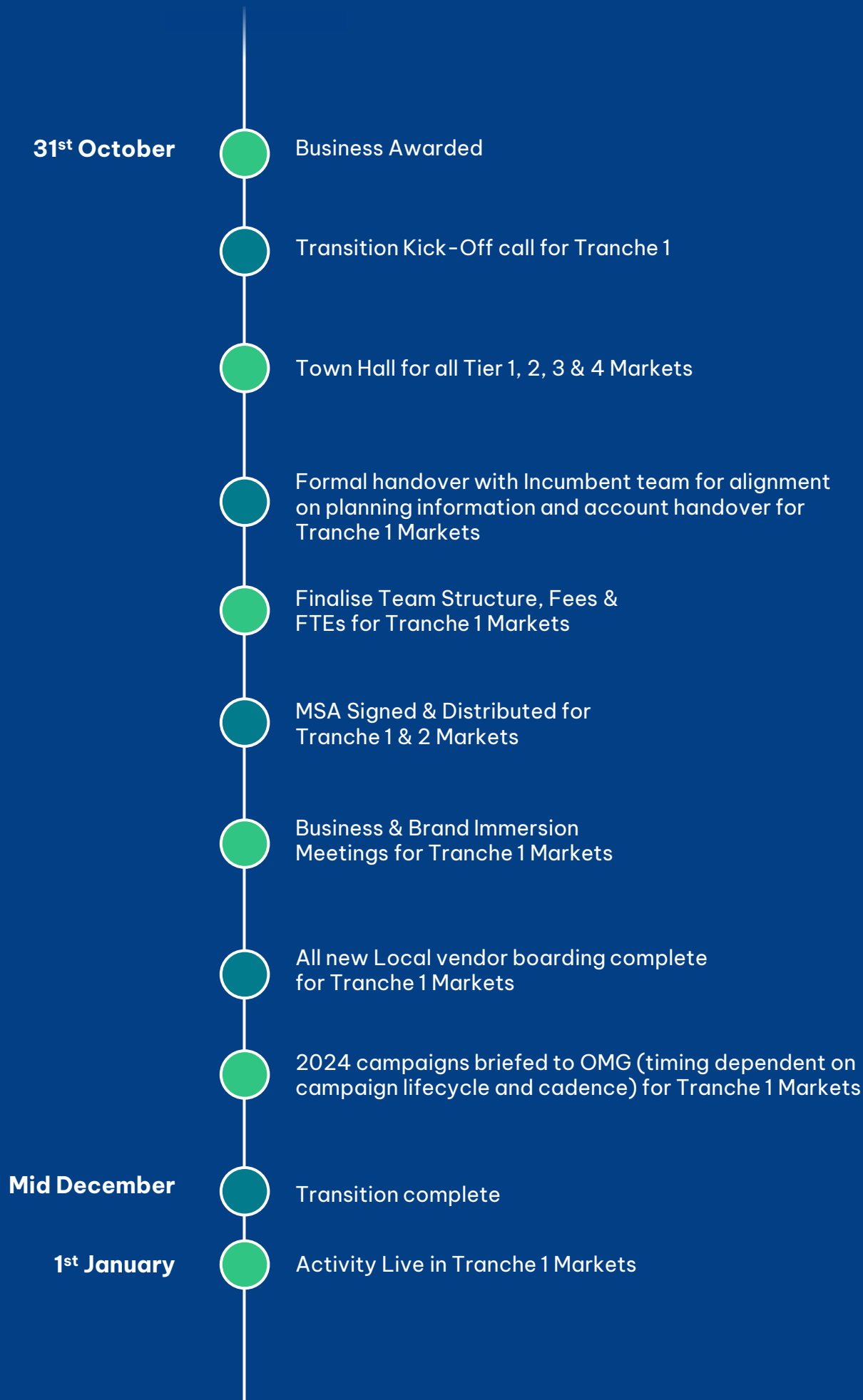
Germany	France	Australia	Italy	Austria	Czechia
Jenny Görlich Germany Transition Lead	Stephana de Viry France Transition Lead	Ali Jones Australia Transition Lead	Andrea Negri Italy Transition Lead	Lubomir Polach Austria Transition Lead	Ivan Chvalny Czechia Transition Lead

Your Local Transition Team Leads – Tranche 2

UK	Ireland	Spain	Central EU	USA	LATAM	ASIA	Switzerland
Kathryn DeKeyser UK Transition Lead	Lynn Brennan Ireland Transition Lead	Sagrario Carrasco Spain Transition Lead	Sean Hoban Central EU Transition Lead	Bill Platte USA Transition Lead	Laura Reyes LATAM Transition Lead	Lee Smith APAC Transition Lead	Katharina Ellspermann Switzerland Transition Lead



Key Transition Milestones – Tranche 1





Key Transition Milestones – Tranche 2

31st October



Business Awarded



Town Hall for all Tier 1, 2, 3 & 4 Markets



MSA Signed & Distributed for Tranche 1 & 2 Markets

4th March



Transition Kick-Off call for Tranche 2



Formal handover with Incumbent team for alignment on planning information and account handover for Tranche 2 Markets



Finalise Team Structure, Fees & FTEs for Tranche 2 Markets



Business & Brand Immersion Meetings for Tranche 2 Markets



All new Local vendor boarding complete for Tranche 2 Markets



2024 H2 campaigns briefed to OMG (timing dependent on campaign lifecycle and cadence) for Tranche 2 Markets

Mid June



1st July



Activity Live in Tranche 2 Markets

02

Tenets of Transition

Principles for a Fast and
Flawless Agency Handover





What We Commit To

Completed in 6 Weeks, no Disruptions for Tranche 1 Markets

Full, final transition of Tranche 1 markets in 6 weeks.

Embedded Global Transition Team at No Cost to You

Dedicated Transition Specialists, provided at-gratis to Allianz.

100% Transition Team Operational, Day 1

Zero ramp-up time, fully functional from start.

Full Team Mobilised in 90 Days

Staffing commitment in 90 days from agency contract commitment.

Joint Business Plan Enhancement

OMG Investment clout and product capability enriches necessary JBP planning.

100% Historical Data Preservation

Seamless integration, extraction, and consolidation of all historical data as required.

Best-in-Class Transition Utilities

Proven project management, data transfer, and talent management tools.

Full Transparency, in Everything

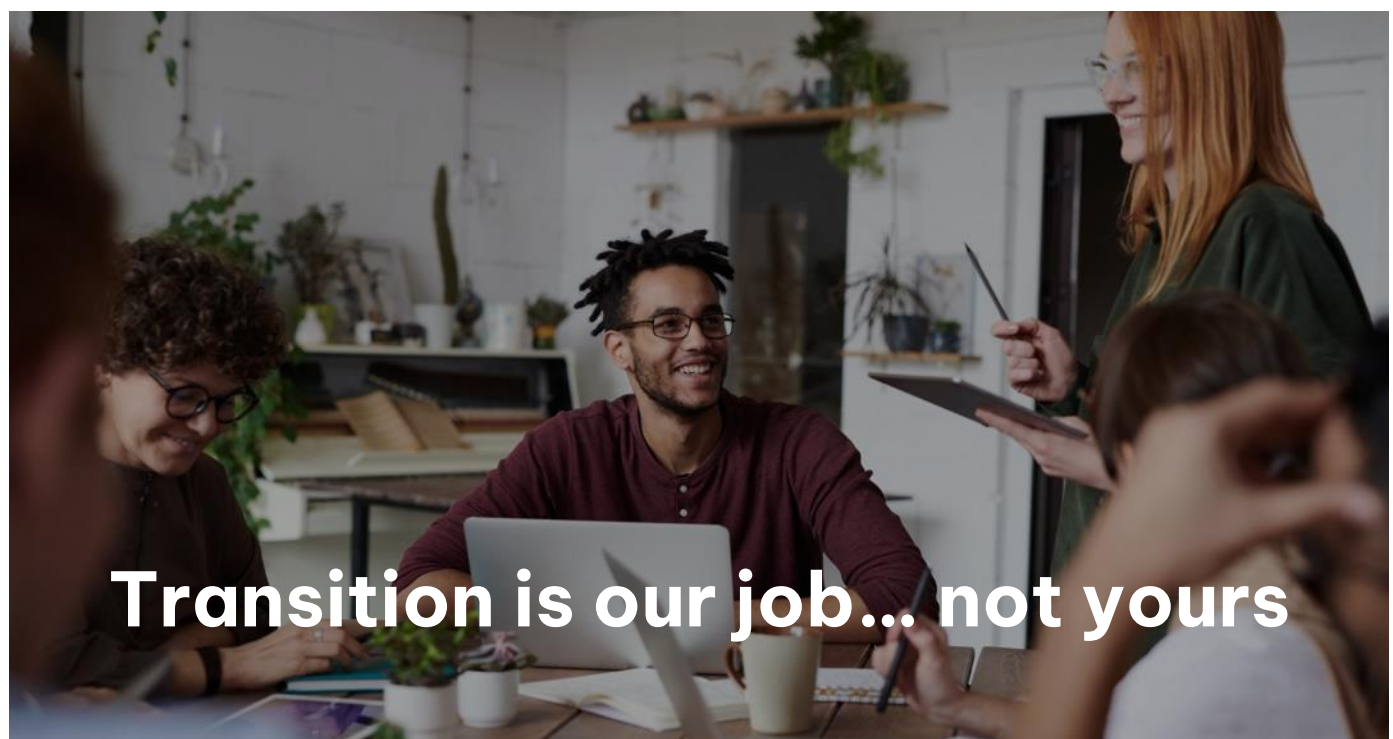
Clear / accountable measures to ensure collective success.



Tenets of Transition

Allianz will not be burdened with unnecessary work during this agency change. Our Transition Team will remove weight and requirements from Allianz with dedicated transition experts. In our experience, a successful transition requires the following principles:

Dedicated, Embedded Transition Lead	Separate Transition Team from Day-to-Day	Clear Vision and Goals
Relentless Focus Securing Talent	Proven Process for Success and to Mitigate Risk	Communication / Clear Direction
Mapping Key Stakeholders to Transition Team	Accountability on a Clear and Consistent Timeline	Guaranteed Process and Outcomes





Tenets of Transition



Separate Transition Team (From Day-to-Day)

Transition Captains will be supported by a dedicated transition team, fully separate from the day-to-day 'working' team. The transition team's sole function is to transition the business with no disruptions, minimising risk and delivering capability that provides both consistency and excellence in service. Team OMG will build the Transition team, with bespoke specialist resources from within OMG, who do not work on the Allianz business, and are ready to be immersed in the transition from Day 1.



Dedicated, Embedded Transition Leadership

In order to ease the pressure of transition responsibilities on Allianz internal stakeholders, OMG will embed market dedicated 'Transition Captains' to partner with Allianz. Our expert business operations and PMO transition talent will act as an extension of the Allianz team, providing internal leadership of the transition and will be the point of contact and liaison with the incumbent agency. This lessens transition requirements and burden from Allianz stakeholders. They deliver on operational mobilisation, workstream accountability, incumbent information collection, codification of incumbent deliverables, and is a liaison for Allianz media suppliers / vendors. This ensures a constant, accountable presence, providing a frictionless and direct route for transition status, office hours, and question resolution.



Clear Vision and Goals

From the moment of selection, our transition leadership will meet with Allianz to outline the vision of the transition and set clear goals. Team OMG will develop and implement a Contract of Expectations that ensures we have the right process, transparency, and accountability across all involved parties, OMG, the Incumbent and Allianz. This accountability framework outlines ways of working, timelines, milestones, and cadence of progress tracking. Allianz will be aware of the cadence on updates and key milestones to relevant stakeholders, in a clear and timely manner.



Relentless Focus on Securing Top Talent

As discussed throughout this pitch process, Team OMG has selected the very best talent and will continue to add to the team by leveraging both existing and internal resources and complementing those resources with new hires. As part of the dedicated transition team, we will assign an HR specialist whose sole focus is on ensuring the team is fully staffed within a guaranteed timeline. This includes sourcing from within OMG, the industry, and previous agency where talent has been identified by Allianz.



Tenets of Transition

Onboard and Build Plans on a Proven Process to Mitigate Risk

We have a relentless focus on risk mitigation with a Global Transition Playbook of best practices that identifies considerations, potential risks, and alternative routes to deliver based on predetermined risks. Based on our transition experience, we have foresight into detailed requirements, potential pitfalls, and checkpoints which reinforces our process for an infallible transition, allowing us to be ahead of the curve from the onset.

This includes developing a clear contract of expectations for roles and responsibilities for transferring both media planning and execution from the incumbent (across both brand and performance):

Level of Incumbent Engagement



To reduce burden on Allianz, it is required that the incumbent be actively involved in knowledge and information transfer between agencies (across brand and/or performance). We collaborate with our client partners to develop a comprehensive transition scope for the incumbent to be held accountable to. Market Transition Captains act as a Allianz resource to confirm incumbent accountability on behalf of the client. This assists in resolving issues with the incumbent where there is lack of transparency and detailed information. We also have experience in transition engagements where a consultancy stakeholder(s)/pitch consultant is actively involved to confirm incumbent accountability.

Planning/Buying Transition Scope



As a part of the scope between agencies during transition, we align on campaigns and/or channels of assignment for both planning exercises and buying implementation. It is critical to confirm clear swim lanes with the incumbent to minimise any disruption or risk to the business. Depending on timing, campaign planning cycles, transfer of information, and implementation - the incumbent may be required to continue planning select campaigns (based on timing of onboarding and knowledge transfer) or to provide additional implementation detail on campaigns planned previously. For example, if the transition occurs during a live planning cycle, the incumbent may be best suited to continue their planning process prior to handoff of tactical implementation information to OMG.

Kicking Off New Campaigns



We schedule a cadence of immersion sessions, aligned to media stakeholders both global and local to review forthcoming campaigns and briefing requirements, with strategy leadership. Where the incumbent has already been briefed, these sessions occur with the incumbent to assess status of where they are in the planning lifecycle (and confirm any client preference or requirements for re-planning). To rapidly scale information collection, we provide custom surveys (vis Smartsheet) to client stakeholders, to get a direct 1:1 assessment of their needs and requirements. This information is fed into a Campaign Lifecycle Tracker - for our Operations and Planning team to respond to review brief prioritisation, and schedule respective briefing immersion sessions prior to kicking off (Design Brief/Reverse Brief) with our OMD Design process.



Tenets of Transition

Execution of Already Planned (but not activated) Campaigns

Where the incumbent has planned campaigns separately (prior or during transition), that OMG is required to execute in-market, it is a requirement of the incumbent to provide explicit planning detail including partners, audience targeting, tactics and implementation architectures (e.g. targeting grids) in order to confirm seamless implementation of campaigns the incumbent has planned. In instances where the incumbent declines platform extractions or transfers of media plan detail, OMG supplies standardised media plan templates to the incumbent for the required implementation of detail, confirming there are no gaps, implications, or risk to performance metrics. In addition OMG works directly with the network and direct media vendors to collect required details on commitments and buying requirements.



Timing

Date of transfer and cutover is to be agreed upon at the onset of transition, to confirm seamless billing cutover. We address any nuances across media partners and platforms to minimise risk and ensure no down-time in activity. We align with the incumbent and media partners on the date of transfer, so investment remains intact during the transition process and does not cross over, prior to OMG effective date. This timing is aligned with billing cycles as required (e.g. ad server transfer agreement).



Communication/Clear Direction with Everyone, at Every Stage of the Process

We set ongoing status meetings that include a living transition scorecard owned by Market Transition Captain's and Global Network Management. This provides full transparency, capturing weekly milestones, and resolving immediate action items. We leverage project management tools that organise file sharing, with optional push notifications, providing Allianz with real-time access to transition updates, at a Global Level and specific to each market. Localised meetings are calibrated based on local media transfer requirements, mapping directly to in-market stakeholders on the incumbent side.



Client stakeholders are encouraged to participate in these meetings to share ongoing feedback in all areas of the transition. Democratised tracking of the transition enables key parties to be informed on transition status, even if they are unable to attend weekly status meetings. Sample transition scorecard below:

ACTION ITEM		STATUS	
INFORMATION TRANSFER		Transition of Historical Plans, QBRs, Campaign Recaps	Targeting Grids/Media Plan Extractions for all Incumbent Planned Campaigns
STAFFING	Recruiting Pipeline and Conversion Tracking		
FINANCIALS	Billing Process Alignment Local Billing Requirements	MSA / SOW Global Review	
INVENTORY		DSP Seat Audit / Enterprise Supply Set Up	Provision of Brand Safety Guidelines
MEDIA OPERATIONS	Ad Network Assessment / Trafficking Requirements	Shopping Feed Management Integration SKU Audit	Site Retagging Requirements Assessment



Tenets of Transition



Mapping Key Allianz Stakeholders to Transition Team

Confirming all the right people are in communication is imperative to the success and ease of the transition. Going beyond Team OMG and Allianz Global and Local media teams, we identify key contacts and relationship mapping across Allianz agencies, partners, and our Omnicom Network to ensure we seamlessly integrate. This includes specialty certified Project Management resources to manage asset transition and timelines including, creative asset collection and organisation, site tagging timelines and tracking. In order to reduce the burden on the client team, we embed transition resources to act as an extension of the client team, to act as a liaison with the incumbent.



Process To Enable Accountability

Our tried and tested onboarding approach will ensure a successful transition, minimising disruption to your business, and maximising speed to completion.

Our process consists of:

- Contract of Expectations
- Transition Plan Development
- Handover and Immersion Sessions
- Business Audit and Analysis



Our Transition Guarantee

- Completed in six weeks, no Disruptions for Tranche 1 Markets
- Embedded Global Transition Team at No Cost to You
- 100% Transition Team Operational, Day One for Tranche 1 Markets
- Full Team Mobilised in 90 Days from agency contract commitment
- Joint Business Plan Enhancement
- 100% Historical Data Preservation
- Best-in-Class Transition Utilities
- Full Transparency, in Everything

03

Dedicated Transition Team

Global & Local Transition Talent,
Engaged before Day 1





Transition Team

In order to ease the pressure of transition responsibilities on Allianz internal stakeholders, OMG will have a dedicated Transition Lead in each market to partner with Allianz. Our expert business operations and PMO transition talent will act as an extension of the Allianz team, providing internal leadership of the transition and will be the point of contact and liaison with the incumbent agency. These resources will deliver on scaled operational excellence, coordinating across brand and performance for each Allianz market.

This model lessens transition requirements and burden from Allianz stakeholders. Embedded talent delivers on operational mobilisation, project management, workstream accountability, incumbent information collection, codification of incumbent deliverables, and is a liaison for Allianz media suppliers / vendors. This ensures a constant, accountable presence, providing a frictionless and direct route for transition status, office hours, and question resolution.

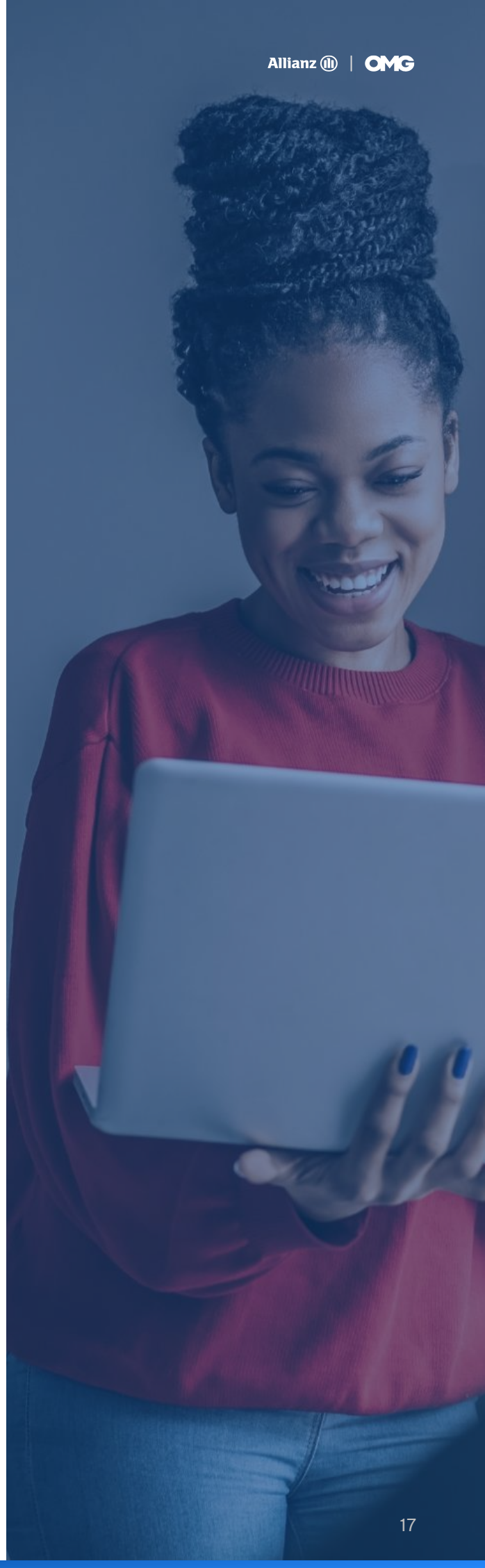
Allianz's Core Transition Team is a dedicated team of Operational Experts, provided to Allianz at-gratis. Your team will plan, lead, and project manage the transition. Defining transition scope & requirements, streamlining relevant materials codification, data transfer, platform transfer, buying architectures, and media and financial operations.

The Transition team will align with Allianz's Global Marketing, Media, and Data & Technology teams as required, supported by an extended implementation team, ultimately overseen by Executive Sponsorship. This confirms that transformation priorities and business opportunities are assessed to create a comprehensive transformation roadmap, further enabling in-house excellence, in parallel to transition.

Please find the dedicated Transition Team for Allianz on the following pages, including detailed bios.

Every Tier 1 & 2 Market listed would also have the following transition roles:

- Project Management
- Financial Operations
- Data Operations
- Strategy & Planning
- Investment & Activation





Global Transition Team



Blake Cuthbert (Global Executive Leadership)



Blake brings nearly 20 years' experience in marketing, combining his experience in digital, media and creative, across all categories, including for global brands; Mercedes Benz, Estee Lauder Companies, Levi's and L'Oréal. Blake's last role was Expert Partner at Bain & Co, helping them in setting up and running their marketing transformation arm. Previously Chief Digital Officer, Blake has recently returned to OMD as EMEA CEO.



Nitya Varma (Global Transition Lead)



Nitya has over 18 years of experience spanning across research insights, communications planning and strategy. She has worked in multiple markets and her Global experience includes working with brands such as Bacardi, Standard Chartered, P&G, Aviva, NatWest, Lenovo, TikTok and Unilever. Nitya's experience working in local and global teams across varied markets enables her to collaborate effectively across agency and client teams. Her team management and problem solving abilities has allowed her to deliver successful results with clients and agencies undergoing various forms of transformation.



Akguen Karakas (Global Business Lead)



Akguen Karakas has been working for more than 20 years in the media business and since 2007 at OMD. His role in the business is to run the agency team and deliver on client's requirements. With experience across different global and local sectors, running client dedicated teams and leading an array of different operating models, he is accountable for overall outputs and the acceleration of client's business. He is passionate about simplifying the complexity of our business to deliver on client's business growth. Akguen has successfully transitioned a number of large scale businesses into OMD Germany, including; Daimler, Allianz & Allianz Direct, Bitburger & Gerosteiner, Stada and Storck.



Rakhi Datta (Global Finance Transition Lead)



Rakhi is a seasoned finance executive with over 25 years of international finance, management and accounting experience in media & entertainment and consumer products industries. With a decade at OMD, Rakhi has vast experience in leading financial discussions with our top global clients. During her time at OMD, she has been transforming how our agency structures commercial deals by building proposals that align the value we bring to our clients. By cultivating and nurturing financial/commercial client relationships with key Procurement/Sourcing, Legal and CFO client partners, she is known to keep financial aspects of our key accounts running smoothly globally.



Jonathan Burrill (Global Investment Transition Lead)



A Business Director within OMG's Global Investment team based in London, Jonathan will support the Allianz transition ensuring the media pricing commitments made are set up for future success. With 10 years experience across new business in Omnicom's Global Investment team, Jonathan brings a breadth of understanding to the Investment-related transition process.



Global Transition Team (Cont'd.)



Marie Marcoux (Global Legal Transition Lead)



Marie is a French qualified lawyer with strong international experience who started her career in private practice with law firm Hogan Lovells. Specialising in commercial law and media & advertising law, Marie has a deep knowledge of our industry and always seeks to understand the needs of our clients when negotiating media services agreements. She works closely with business and finance teams to facilitate the onboarding of new advertisers from a legal perspective. Following the onboarding, Marie remains a close partner to the legal and procurement departments of our clients to manage the contractual relationship. Over the past few years, Marie has been the legal lead for the following advertisers : Air France, Allianz, Beiersdorf, CHANEL, Ekaterra, Henkel, Levi's, Lindt, Renault, Sanofi, Schwarz Group and Vans.



Andrew Raymond (Global Media Campaign & Planning Transition Lead)



With 10+ years of media experience across Asia-Pacific and Europe, Andrew's role at OMD has been a cornerstone of the global strategy and planning team. Whilst having a background in both creative and media strategy, Andrew's role sees him leading ESG strategy across the agency. This has seen him consulting with clients such as McDonald's, Bacardi Ltd., PepsiCo and FedEx to develop strategies and planning principles that drive business growth whilst minimising environmental impact and maximising inclusive reach across all relevant audiences.



Miles Pritchard (Global Data & Tech Transition Lead)



Miles has over a decade's experience working in marketing and advertising technology, with roles in both agency and technology companies. Miles joined Omnicom in 2017, leading data & technology strategy within Annalect EMEA, before moving to OMD EMEA to head data & technology transformation. Miles currently oversees a team of over 65 data and technology specialists, with a wide range of capabilities, including cloud architecture, data governance and visualisation, martech consultancy, audience solutions and data science. Miles has a strong digital background, leading paid search, social and programmatic teams early in his career and has led digital transformation projects for major brands including Mercedes-Benz, PepsiCo, Tourism Ireland and Burberry.



Kate King (Global Talent Transition Lead)



Kate is committed to creating an environment that enables people to flourish, develop their talent and set them up for ultimate success. A true believer in people-first, Kate is known for her creativity in talent management, strategic recruitment, transformation and change management, learning and development, employee relations and performance management. Kate takes a keen interest in nurturing young talent and equips them with the right skills to help them to succeed in the world of media. Throughout her 30 year career at OMG, Kate started as the very first employee at PHD and since then, has sat on the PHD Board of Directors, and was recently promoted to Chief Talent Officer at OMG.



Sabina Tayabali (Global Onboarding & Exit Transition Lead)



Sabina has been in the media industry for over 20 years, her experience is both media owner and media agency side across a variety of local and global roles. With a background dominated working with clients and leading global business strategy and delivery of media. Sabina has translated this experience and brought it to OMG for the last 3 years to deliver client transitions ensuring that clients are onboarded and their concerns are addressed ensuring a seamless move to OMG in a timely and efficient manner.



Local Transition Team Tranche 1



Jenny Görlich
Germany



Jenny has over 20 years experience and her extensive industry network and knowledge provides her with a panoramic view that transcends the boundaries of distinct domains including branding, performance, and technology. Jenny has previously managed performance marketing and other media activities at Direct Line AG (2011-2015). Most recently, she led the online sales at Deutsche Kreditbank AG (2019-2023), where she closely collaborated with the brand departments, drove integrated campaigns, developed MarTech strategies, and optimised data flows.



Stephana de Viry
France



Stéphana has more than 15 years' experience in media. She had served a number of brands across a number of sectors including EDF, Apple, Sony Pictures, Hasbro, Easy Jet, Coca Cola, Barilla, Sc Johnson etc. Since 2020 she is the OMD Lead for Allianz in France, supporting them to optimise and improve their media communication but also in value creation. Stephana believes that rationality, analytics and rigor are keys in media but creativity and innovation are the real game changers.



Ali Jones
Australia



Ali has over 14 years media experience, having focused on planning and client management as an area of expertise and passion. Ali is responsible for team scope, delivery and stakeholder management and has overseen many transitions for OMG in Australia.



Andrea Negri
Italy



Andrea is a talented Client Business Director with decades of experience in the media services across a multitude of clients from most industries. He helped brands as Vodafone, PSA, Credit Agricole, Boehringer Ingelheim, Procter & Gamble, Unilever, Verti/Direct Line and Jaguar Land Rover to grow their business through media. Climbing the funnel bottom-up, from very detailed digital performances to broad mass media campaigns, he leverages personal attitude and acquired hard and soft skills to help clients focusing on the most effective and efficient opportunity, ensuring that any service is properly delivered with correct value and timing.



Lubomir Polach
Austria



Lubomir is an enthusiastic team player with a 'can-do' attitude and strategic mindset. In his eight years of agency experience, Lubomir had served global and local brands including McDonald's, Nissan, Netflix, Tiffany & Co as well as Verbund (Austria's biggest Energy Provider) and Austrian National Lottery. He is passionate about digital communication and new technologies.



Ivan Chvalny
Czechia



Ivan has worked in the media industry for almost a decade. His responsibilities include leading client relationships for several global and local brands including McDonald's, Henkel, Ford Motor Company, Philips, Dr.Oetker, Bacardi or Calzedonia Group. He has passion for integrated communications and creative media. In his work he focuses on business development and strategic media planning with emphasis on media effectiveness. He strongly believes in long term partnerships.



Local Transition Team Tranche 2



Kathryn DeKeyser
UK



Kathryn De Keyser is a media veteran, with 17 years experience at OMD, where she has worked on both local UK and global clients, including Barclays, Channel 4, Lidl, Mercedes and indeed OOH plans for Allianz back in the very early days of her career, supporting the naming rights of the Allianz Arena. Her day-to-day role focusses on evolving her client's offering to be best-in-class for today and tomorrow.



Lynn Brennan
Ireland



Lynn serves on the management board and has led the successful agency (full service digital and offline) transition for Aer Lingus (IAG). With 15+ years experience, Lynn has amassed considerable expertise across a range of sectors leading brands such as Aer Lingus, Diageo, Laya Healthcare and Warner Bros. Lynn is passionate about developing excellent working relationships bringing all agencies together on the journey.



Sagrario Carrasco
Spain



Sagrario has 20+ years experience in the marketing industry, working for international brands such as McDonald's, Renault, easyJet, and Ford. Sagrario will ensure that service and business commitments are met for Allianz, making the transition as smooth as possible. She has strategic vision and orientation to clients' business that help them to achieve their growth objectives.



Sean Hoban
Central EU



Sean has 25+ years experience agency side working in multiple local markets including UK, Romania and Czech Republic. His wealth of international agency experience at OMG includes leading network client teams on accounts such as Apple, FedEx, PepsiCo, Visa, Sony. For the last six years Sean has been Managing Director for Omnicom Media Group in Central and Eastern Europe, with operational responsibility for 34 offices in 30 countries.



Bill Platte
USA



With 20+ years in Creative and Media agencies, Bill has garnered vast experience in CPG, B2B, QSR, Retail, Technology, Automotive and Government businesses. His experience equips him to manage process, optimisation, asset delivery and localisation. Being CSM/CSP Certified, makes him proficient in applying both waterfall and agile approaches to overcome barriers and mitigate risk while supporting transition efforts.



Katharina Ellspermann
Switzerland



Katharina boasts 15+ years of media agency experience in Switzerland and Germany, working both locally and internationally, advising clients in various industries such as automotive, fashion, FMCG, entertainment, and various B2B sectors. With over 6 years in leadership roles, she's adept at staff development. Her rapid comprehension allows her to swiftly identify client needs, leading to tailored solutions.



Laura Reyes
LATAM



Laura is a seasoned strategic leader, with over 15+ years in the industry. Laura has a keen focus on ensuring commercial success, operational efficiency and strategic excellence. Laura has led 10+ client transitions for OMG, instilling her expertise and skillset to govern flawless transitional operations.



Lee Smith
APAC



Lee Smith is a media agency veteran with over 25 years' experience across B2C & B2B brand categories. Lee has split his tenure between Canada and Singapore (since 2008) and works across all APAC markets. Lee has been responsible for key clients like HP, McDonald's, Fidelity and Volkswagen. Lee's most recent remit is to grow our business through digital transformation and expansion of services through leading capabilities across our clients in Asia Pacific.

04

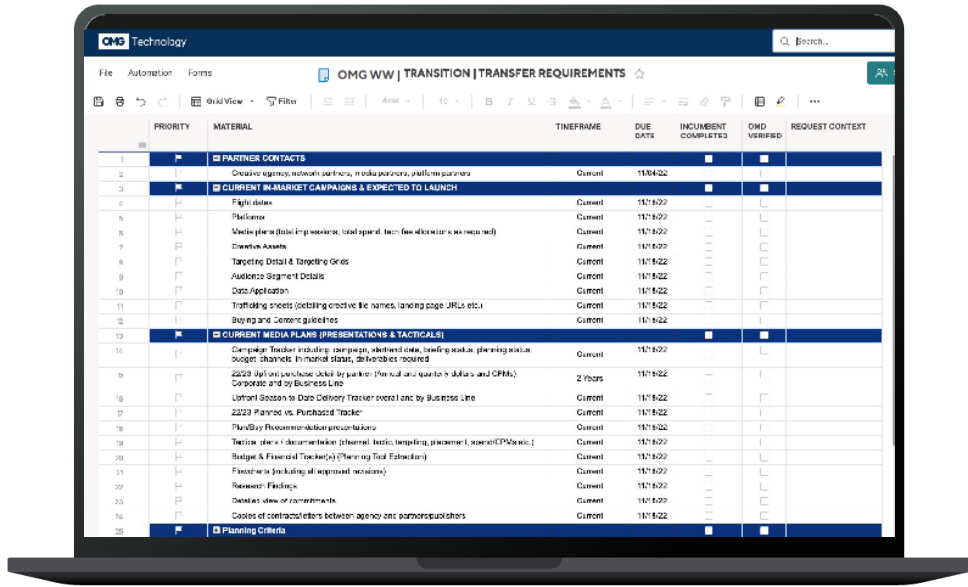
Best-in-class Transition Utilities

Unfettered Transparency into
Transition Tracking & Status



Best-In-Class Transition Utilities

We will centralise all communication, asset tracking, and planning into our fully integrated, globally scaled tools throughout the transition and beyond into day-to-day business management. This will deliver connectivity throughout all markets where needed while still allowing for local customisation.

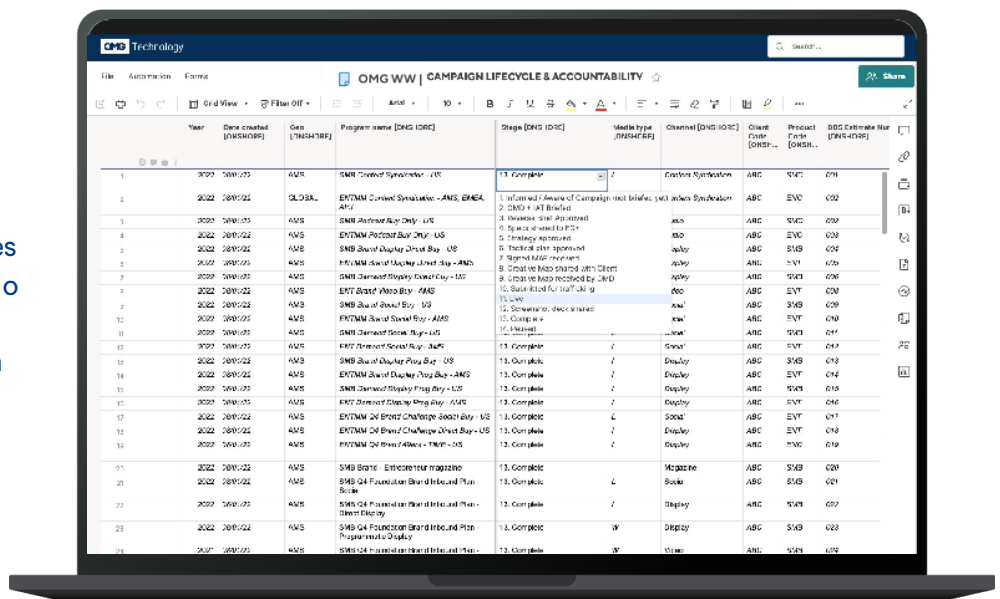


Data Transfer & Asset Tracker

Confirms centralised tracking of transfer information. Enables Transition Team to track materials, data, and access requests, in-real time tracking status of transfer from the incumbent. Provides transparency to Allianz on the status of transfer requests. We set up automated notifications to relevant, accountable parties when request deadlines are not achieved.

Campaign Lifecycle & Accountability Tracker

Confirms centralised tracking of campaign transfer information, and stage of lifecycle of campaign (e.g. Brief, Planning, Approval etc.) Enables Transition, and Global Delivery Hub to track campaigns through their lifecycle. Confirms accountability in planning and buying, designating OMG vs. incumbent swim lanes and accountability requirements.



Best-In-Class Transition Utilities

Key Transition Workstreams

Please find below a series of meetings, their cadence, suggested attendees and their contents that we work through during the transition.

Meeting	Cadence	Attendees	Topics
Weekly Transition Status (Global)	Weekly/2x weekly (based on requirements) Optimally scheduled on Tuesday and Thursday (1.5 hr.)	<ul style="list-style-type: none"> OMG Business Team Allianz (as required) 	<ul style="list-style-type: none"> Materials collection requirements & status Platform transfer Data collection Tagging assessment Campaign cutover (planning, buying)
Business Immersion	Business onboarding and immersion meetings with + Allianz	<ul style="list-style-type: none"> OMG Transition Team OMG Business Team Local Market Stakeholder Allianz 	<ul style="list-style-type: none"> Team Structure Audience Framework Brand Requirements Marketing & Content Calendar Data & Tech
Talent Recruitment & Staffing	Bi-weekly	<ul style="list-style-type: none"> OMG Exec Leadership OMG Business Team Allianz Leadership 	<ul style="list-style-type: none"> Staffing fulfillment Recruitment pipeline
Billing & Financial	As required	<ul style="list-style-type: none"> OMG Finance Allianz Finance / Media 	<ul style="list-style-type: none"> Systems & processes Media Authorisation Investment Deliverables & Tracking
Campaign Prioritisation	Weekly - optimally Wednesday between transition status meetings	<ul style="list-style-type: none"> OMG Transition Team Allianz Media 	<ul style="list-style-type: none"> Outline key campaign prioritisation Status of campaign planning and execution Address timing requirements and target dates across campaigns
Key Workstream Onboarding	One-time meeting(s) for onboarding breakout sessions (1.5 hr.)	<ul style="list-style-type: none"> OMG Transition Team OMG Business Team Allianz Media Allianz Data & Tech 	<ul style="list-style-type: none"> Platforms and formats Measurement & reporting Test & learn agenda Partnerships Ways of working
Partner Onboarding	Per-Partner	<ul style="list-style-type: none"> Media Partner/Publisher OMG Transition Team 	<ul style="list-style-type: none"> Partnership overview Learning agenda Historical knowledge transfer Commitment & JBP review
Creative Agency Onboarding	As required by agency	<ul style="list-style-type: none"> OMG Transition Team OMG Business Team Creative Agencies 	<ul style="list-style-type: none"> Content calendars & production schedule Ways of working & collaboration Lead times
Transformation Focus Areas	OMG Team in collaboration with Allianz to provide guidance on breakout meetings as required	<ul style="list-style-type: none"> OMG Transition Team OMG Business Team TBD 	<ul style="list-style-type: none"> Data Operations & Performance Reporting Tech Stack Discovery Session Omni Setup & Integrations

Best-In-Class Transition Utilities

Talent Acquisition & Staffing Dashboard

Provides full transparency into entire staffing supply chain, from outreach, to interviews, to hires and onboarding. Ensures Allianz has unfettered transparency into the Talent & Recruitment process, reviewed bi-weekly with Talent Acquisition Leadership and OMG Operations Leadership.

Example Talent & Recruitment Tracking

Current Team	Internal Rotations	External New Hires	Remaining Open TBHs
Cade Hogan	Jolie Holland	Emersyn Gilmore	OPEN
Kora Henry	Osiris Morgan	Fletcher Greene	OPEN
Alexis Robertson	Raelynn Patton	Roman Duarte	OPEN
Rivka Foster	Fletcher Greene	Oaklynn Spears	OPEN
Reese Quintana	Phillip Booth	Ryan McDaniel	OPEN
Sarah Peralta	Kairo Brock	Jax Aguilar	OPEN
50 total	60 total	40 Total	20 Total

Name	Function	Role	Location	Source	Status	Expected Start Date
Charles Duncan	Planning	Manager	LDN	Internal Rotation	CONFIRMED	31/11/23
Maya Waters	Planning	Associate	LDN	External Hire	CONFIRMED	31/11/23
Tilden Oliver	Planning	Associate	LDN	External Hire	CONFIRMED	31/11/23
Gina Choi	Search & Social	Sr. Associate	LDN	Internal Rotation	CONFIRMED	31/11/23
Marquis Johnson	Search & Social	Associate	LDN	External Hire	FINAL INTERVIEW	14/12/23
Hannah Loxton	Planning	Manager	LDN	Internal Rotation	INTERNAL REVIEW	14/11/23
Julia Standon	Planning	Sr. Associate	NYC	External Hire	FINAL INTERVIEW	14/11/23
Aniqa Chowdry	Planning	Associate	NYC	Internal Rotation	INTERNAL REVIEW	14/11/23
Nadia Calles	Planning	Associate	NYC	Internal Rotation	INITIAL INTERVIEW	5/12/23
Jia Sun	Planning	Sr. Associate	NYC	External Hire	INITIAL INTERVIEW	5/12/23

05

Data Requests & Transfers Protocols

Capture of Historical Data &
Information Partner Contract Transfer





Let's Get the Transition Started

Step 1: Scope & Agreements

Confirming scope alignment and setup in OMG systems. On the following pages are details for each request. The list below highlights top-line responsibilities and requirements to get us started.

OMG is familiar with transition engagements that require involvement from both Global and Local Stakeholders, including External Consultants/Pitch Consultants, as required. We adjust accountability requirements across all involved and critical parties upon understanding of level of incumbent engagement expected as well as any other third-party involvement in transition, upon agency announcement and review with Global Client Stakeholders.

		Allianz	Incumbent
Operations & Financials			
MSA / SOW Development & Confirmation	X	X	
Billing Process	X	X	
Payment Terms	X	X	
AOR Letter	X	X	
Internal Financial Setup	X		
Information & Data Transfer			
Requirements Briefing	X		X
Data & Access Transfer	X		X
Transition Status Meetings	X	X	X
Client Functionality			
Authorisation Process	X	X	
Financial Reporting Processes	X	X	



Let's Get Started: Sample Checklist For Financial Specifics

Financial Documents

- Amended SOW
- Amended MSA

Billing Process

Delivery of Invoices:

Hard copy of billing? (Y / N)

Email billing? (Y / N)

Upload billing via client website or EDI? (Y / N)

Name(s) of those receiving billing: _____

Primary Client billing address (as it should appear on their invoices): _____

Email where billing should be sent (if instead of or in addition to hard copy billing): _____

Payment Terms

Number of days client has to pay OMG (current terms Net 30) _____

Is there a day of the month client needs billing by? _____

What media types will be used as they require separate billing? _____

Expected month of first media billing: _____

Invoices to be billed Net+ Agree Commission: _____

Is a PO number / Job number required on invoices? (Y/N) _____

Any special billing instructions? _____



Let's Get Started: Sample AOR Letter



Agency AOR example

1st November 2023

Subject:

Agency of Record

To whom it may concern,

This letter is to confirm that CLIENT has appointed OMG as its media planning agency globally.

As such, we have authorised our new media agency OMG to act on our behalf in connection with the negotiation and purchase of advertising and communications inventory for all offline and online media across all CLIENT brands. In preparation for January 1, 2024 and further activity, they will be contacting you over the coming weeks.

Any media purchased or placed either directly by CLIENT'S incumbent agency or by any of its agencies prior to January 1 2024 should continue – as is now – to be billed to AGENCY NAME, or the appropriate party, and not to OMG.

The term of this authorisation is from the date of this letter.

Regards,

[INSERT CLIENT NAME] Signature:

Name:

Title:

Date:

Phone Number:



Information Transfer | Capture of Historical Data

We ask that Allianz share this list of information transfer requirements (page 31 of this document) with the incumbent immediately following agency announcement. This is vital in seamlessly aligning with the media the incumbent handles. We look to limit burden on the Allianz team, with most requirements accessed through the incumbent agency, including strategy presentations, media plans, reporting, campaign recaps, roadmaps, etc.

Data & Access Transfer Requirements Briefing

In Week 1 of transition, OMG hosts both centralised briefing with the respective incumbent Global Team and required local team briefings serving as a comprehensive Materials & Data Transfer Overview. This is a kickoff with the incumbent key stakeholders, with early identification of critical incumbent parties to be involved and documentation of requirements from the incumbent vs. requirements in-house coming from Allianz directly to OMG. This sets expectations upstream for requirements for transfer.

Materials Transfer Hub

Secure information transfer, including material documentation such as plan presentations, measurement frameworks, post-buy analysis studies etc. Is set up via an external SharePoint hubs, accessible by Allianz, OMG and the incumbent agency and/or transition consultant. We setup folder structure aligned to business unit requirements, permissioning guardrails for exclusive file access. Each day, this file transfer repository is automatically flagged for new file inclusions, changes and/or removals – alerting our PMO of critical handover information to be socialised through the extended business team.

Process For Historical Data Ingestion

OMG has streamlined integrations with market-leading technology partners for data ingestion, storage, and visualisation, including Datorama, Amazon Web Services S3, Amazon Redshift, Adobe, Tableau, SQL and Alteryx. We leverage the power of Datorama to capture and transform data, reducing time for delivery – stored for analysis and visualisation. We also integrate in use cases where data is also ingested into S3/Redshift environment to ensure adherence to row count limits, also visualised within Tableau.

For Allianz, with ownership of your Adobe environment in-house, OMG works in an interoperable fashion to manage API connections, data hygiene and cleanliness, and harmonisation workflows for historical data processing. For data external to an API integration (e.g. offline media data, or partner direct data) we manage and process via templatised files or SFTP flat files for data management upload purposes.

Migration of and Access To 3P Buying Platforms

We have the shared ambition for our clients to have ownership of their media platforms and data assets. It is our expectation that given the data is Allianz's data – to allow for unfettered platform access and transfer (e.g. Ad Server, DSP Seat, Historical Data Files etc.). With Allianz's in-house ownership of media platforms and systems, Allianz's Global Team involvement, stewarding Data & Technology Platforms will be directly mapped to our Global Transition Leadership, and Global Data Operations team to enable seamless access permissioning, and API integration setup (where applicable).

For platforms and systems owned and contracted by the incumbent – we have experienced transition engagements where the incumbent declines transition of platforms and data assets. If platform account ownership is transferred, extracted to OMG and/or is owned by Allianz – this significantly reduces technical labor requirements (e.g. site retagging, campaign architecture rebuild) and material information/data files required from the incumbent. In instances where access is unable to be provided or transfers declined, we execute a more manual approach, leveraging our flexible Global Delivery resources for scaled technical implementations as required (e.g. manual data extracts from platforms or review of material files).

For Global access requests and permissioning (to both Allianz owned and any agency owned platforms), we leverage a centralised HIVE Global Request Form, to confirm permissions requests are managed in a consolidated dashboard, and setup properly and expeditiously. OMG works both in a model where we are provided admin access to client owned- platforms, and manages permissions to reduce burden on Allianz.

Adoption and Implementation of Proprietary Technology

In the first weeks of the transition, OMG runs a technology assessment with Allianz to identify integration points between Allianz's technology infrastructure and Omni/our other proprietary technology solutions. The output of this assessment is a deployment roadmap that will plan both the technical work (e.g. integration of Allianz's 1st party data with Omni through Infosum, access requirement for Allianz users to Omni) as well as enablement work (e.g. training for Allianz teams on Omni Audience Explorer) – also taking into account external milestones like privacy management with Allianz IT.



Step 1: Information Transfer (Historical Data)

TIMEFRAME	REQUEST
2 Years Prior	<p>Media Plans</p> <ul style="list-style-type: none"> • Plan/Buy Recommendation presentations • Flowcharts/Flowchart Data Extractions (including all approved revisions) • Research findings • Detailed view of commitments • Copies of contracts/letters between agency and partners/publishers
1 Year Prior	<p>Planning Criteria</p> <ul style="list-style-type: none"> • Objectives / KPIs • Results / insights • Media plans, tactical recommendations • Test and learn agendas • Targeting insights • Optimisation logs • Seasonality/scheduling • Content Calendars
Current	<p>Planning Guidelines and Status</p> <ul style="list-style-type: none"> • Protocol / timelines for planning (key dates, lead times) • Plan status (planned, pending, approved, active, outstanding) • Status of negotiations, contractual commitments (e.g., JBP's, commitments, publisher agreements) • Order letters for any current purchases • Planned v. owned information/analysis • Outline of any inventory changes/requirements needed • Windows of change & flexibility – options taken to date • Upfront added value details • Partnership/Sponsorship details, including incumbencies • Details on any outstanding added value elements
Current	<p>List of Agency Partners and Contact Information (e.g., creative agency, network partners, media partners, platform partners)</p>
Current	<p>For Each Campaign Currently Live or Expected to Launch:</p> <ul style="list-style-type: none"> • Flight dates • Platforms • Budget • Media plans (total impressions, total spend, tech fee allocations as required) • Creative Assets • Targeting Detail & Targeting Grids • Audience Segment Details • Data Application • Trafficking sheets (detailing creative file names, landing page URLs etc.) • Buying and Content guidelines
Current	<p>Measurement Framework (Total/Category/Product/Segment) including Business Performance, as well as Diagnostic Metrics</p>
2 Years	<p>Copies All Brand, Sales, Offline, Platform, and Cross-Channel Measurement Studies from Past/Current Year</p>
2 Years	<p>Data/Analytics Driven Learning Agenda</p>
2 Years	<p>Test and Learn Roadmap, Test Design, and Reports</p>



Step 2: Material & Data Transfer

TIMEFRAME	REQUEST
Buying Guidelines	
2 Years	Strategic and Buying Target Definitions Buying and Content Guidelines
2 Years	Historical Target and Audience Cohort Analysis Presentations
2 Years	Segmentation and Details on Segmentation Data Partners
Current	Data Provider / Partner list for linear TV networks and Digital Syndication partners/ Segmentation / Targeting
Current	Targeting Definitions by Product / Brand (Custom and / or Standard Syndicated Digital Segments)
Current	Booked activity to be transitioned/implemented - renegotiation or transfer handovers, volume or duration - based deals, legacy partnerships and client negotiated activity
2 Years	Immediate annual and specific quarterly activity, including relevant deal/position/volume status and transfer insights
2 Years	Approved programming/inclusion programming (provided in post-reporting for linear TV)
Data Transfer	
4 Years	Four-year upfront spending summary by daypart and network, by program for syndication
2 Years	Historical cost data, planning CPMs/ CPP translations by daypart for all planning demo
3+ Years	Historical Data Exports (2020-current) Across Partners and Platforms (if Platform Access is not Granted, or Previous Data is not Harmonized)
Current	Understanding of Client's Existing Data Transfer Framework (Cadence, Format, Metrics / Details Included, Delivery, etc.)
Reporting & Measurement	
2 Years	Current (and Last Year) Performance Reporting by Platform, Business Unit / Brand and Campaign (creative / format / cadence / other client preferences)
2 Years	Historical Data and Learnings - Post-Campaign Wrap-Up Reports Including Media Delivery and Detailed Analysis of Sales / Conversion Performance, Competitive etc.
Current	Performance Reporting Details Requested by Client (Creative / Format / Cadence / Other Client Preferences)
2 Years	Historical Inputs Necessary for Upcoming Reporting Requests
2 Years	Current and Historical Media Performance Dashboards
2 Years	Metric Definitions and Inclusion Into Reporting by Channel
Current	Historical Benchmarks by Channel (by Product / Brand)
Current	Precedents Around Key Performance Indicators, Optimisation Metrics and Diagnostic Metrics
Current	Understanding of Parameters Applied to Campaign Performance (e.g., View-thru Attribution Windows)
2 Years	Most Recent MMM Reports
2 Years	Sources Fed into MMM Model (e.g., Display, Search, Social, Website, Macro / Micro Factors)
Current	List of Contact Information for MMM Partner Currently Scoped or Engaged
Current	Attribution Partner Used
Current	Sources Fed into Attribution Modeling Tool (Display, Search, Social, Website, Etc.)
Current	Attribution Model (last touch, combo blended, etc.)
Current	Defined Conversion Window
Current	Process for Management of Data Flow into Attribution Modeling Tool



Step 3: Platform & Technology Transfer

TIMEFRAME	REQUEST
2 Years	Current and Historical Digital Taxonomy and Associated Taxonomy Builders (including Advertiser, Campaign, Placement, Creative, Ad and Onsite Tags)
Current	Programmatic Tech Partners Utilised (e.g., Google DV360, The Trade Desk)
Current	For integration as needed – given handled inhouse. Search Platforms And Tech Partners Utilised (e.g., Google SA360, Skai)
Current	For integration as need – given handled inhouse. Social Platforms And Tech Partners Utilised (e.g., Facebooks Ads Manager, Sprinklr, 4C)
Current	Retail / Commerce Platforms and Tech Partners Utilised (e.g., Product Feed Management, Affiliates etc. - Products-Up)
Current	Linear TV Addressable/Programmatic Partners Utilised (AT&T DirectTV, Comcast, Dish Network, etc.)
2 Years	Ad Servers Used for Each Campaign (Display, Video, Mobile, etc.)
2 Years	Ad Verification Formats Used (e.g., Fraud, Viewability, Page Content, Audience, Geo)
2 Years	Ad Verification Partners Used (e.g., DoubleVerify, IAS)
2 Years	Ad Verification Settings, Confirmation of Brand Safety Risk Keywords and Block Levels
Current + 1-2 Years Prior	List of All Ad Technology Being Used or Previously Tested (e.g., Ad Servers, Dynamic Creative, Feed Management Ad Verification and Other 3rd Party Measurement) GCM, Ad-Lib, Signal, Evidon, Branch, Infosum etc.
Current	Ad Server Network Transfer Agreement (if incumbent owned): Network Name, Network ID, Transfer Date, Network Permissions, Overview of Ownership and Setup
Current	Access To Existing Ad Server Networks and/or Network Transfer agreement
Current	Confirm Timelines and Trafficking Process Currently Being Used across channels (digital, linear TV etc.)
Current	Ad Server Configuration Including Tagging, Conversion, Attribution and / Or Custom Settings Confirm Any Data Transfers or Data Pass Backs in Place (Google Campaign Manager)

06

Timeline and Plan

Rolling Up our Sleeves to Get Going



1

Tranche 1 Markets

November – December 2023



Timeline & Plan

Timeline is further customised in collaboration with Allianz through business discovery sessions. This timeline is to be tailored based on Allianz prospective transition schedule and dates (pending confirmation on agency effective date).

Tasks	Responsible	W 1	W2	W3	W4	W5	W6
	Date	06/11/23	13/11/23	20/11/23	27/11/23	04/12/23	11/12/23
Transition Kick Off Meeting (within 48 Hours of Agency Announcement) OMG Transition Team Mobilisation	OMG / Allianz						
Align on OMG transition scope and expectations with Client	OMG / Allianz						
Align on transition checkpoints and milestones with Client	OMG / Allianz						
Town Hall (with broader Marketing department to introduce OMG & top line transition commitments)	OMG / Allianz						
Transition weekly update with OMG Transition Leads + Client	OMG / Allianz						
2X Weekly transition status call with Incumbent (and Client if required)	OMG / Incumbent						
Weekly transition status materials, and information transfer tracking produced and circulated to Client and Incumbent	OMG						
Weekly Local Market transition status & materials produced and circulated to Client & all OMG Teams	OMG / Allianz						
Weekly OMG talent recruitment and staffing call with OMG + Client	OMG / Allianz						
Key workstream transfer - breakout meetings (scheduled as required)	OMG / Incumbent						
OMG introduction, pitch promise, and team review with extended Client team(s) - socialising with extended stakeholders	OMG / Allianz						
Section Separator							
Finalise team structure, fees and FTEs	OMG						
Scope, staffing, and remuneration approval	Allianz						
Section Separator							
Receipt of Agency of Record letter	OMG						
Modification of Agency of Record letter (if required)	Allianz						
Provision of partner contact information and organograms (creative, publisher, platform partners etc.)	Incumbent / Allianz						
Confirm Incumbent transition scope and timing (campaign calendar identified for planning, buying)	Allianz						
Confirm effective planning/buying transition dates	OMG / Allianz						
OMG transition scope to be agreed and confirmed as required	OMG / Allianz						
OMG agreements to be finalised with Client	OMG						
Establish effective dates for transition of access points across technology platforms (address transfer agreements as required)	OMG						
MSA signed and distributed	Allianz						
Section Separator							
OMG to have arranged credit insurance and highlight additional documentation needed from Client	OMG						
OMG to have highlighted additional documentation needed from Client if more is needed	OMG						
OMG to supply information required to be set up as a vendor at Client	OMG						
Finalise booking and approval process	OMG						
Finalise finance (invoicing/billing) process, by local market as required	OMG						
Establish product & billing codes, open billing estimates	OMG						
All new local vendor boarding complete	OMG						



Tasks	Responsible	W 1	W2	W3	W4	W5	W6
	Date	06/11/23	13/11/23	20/11/23	27/11/23	04/12/23	11/12/23
AGENCY IMMERSION							
Business and Brand Immersion meetings with Client (Business Goals, Campaigns Overview, Target Audiences, Key Learnings)	OMG / Allianz						
Client regulatory, processes and other mandatory agency training	OMG						
Formal handover with Incumbent team for alignment on planning information and account handover	OMG						
Global data and information transfer request scope agreed and briefed out to Incumbent team	OMG						
Partner agency immersions for OMG team (creative, publisher, network, platform partners etc.)	Partner Agencies						
Confirm ongoing processes with creative and partner agencies	Partner Agencies						
Global data and information transfer request to be delivered to OMG team	Incumbent						
CAMPAIGN BRIEFING & PLANNING							
Primary review of 2023/current activity to be managed by OMG	Allianz						
Agreement of 2023 current activity to be managed by OMG/Incumbent during transition	Incumbent/ OMG						
Establish briefing process, provide briefing templates	OMG						
2023 & Q1 2024 campaigns briefed to OMG (timing dependent on campaign lifecycle and cadence)	Allianz						
Marketing and content calendar debrief	Allianz						
Cascade of global strategies to OMG Local Teams	OMG						
Establish effective dates with Client (overall, exclusive to campaign, and/or channels where required)	OMG						
PARTNER JOINT BUSINESS PLANNING							
Kickoff / immersion meetings with digital partners for historical background	OMG						
Outline of JBP requirements with key partners and Client as required	OMG / Media Partners / Client						
Delivery and alignment on partner-level JBP frameworks	OMG / Media Partners						
Define partner JBP commitments, detail, test and learn agendas etc.	OMG / Media Partners / Allianz						
Confirm alignment and finalise JBP agreements with Client and partners	OMG / Media Partners / Allianz						
MEASUREMENT, REPORTING, DATA TRANSFER							
Provide associated measurement frameworks across markets/campaigns	OMG						
Define benchmark key performance indicators, optimisation metrics and diagnostic metrics by brand/business unit, channel and tactic	OMG						
Performance reporting details (style / format / cadence / Client preferences)	OMG						
Provide historical reporting templates, study outputs and data (preferably covering previous 3 years) – by market and campaign	OMG/ Incumbent						
Define historical data requirements to confirm 100% data preservation	OMG						
Perform data extract and codify historical data (2020-current) across platforms and partners, per requirements, confirm no data gaps are present	OMG						
Define and provide access to web analytics and / or attribution partners utilised	OMG						
Define data sources for modeling (MTA, MMM)	OMG						
Brand and conversion study measurement partners utilised	OMG						
Align on process for management of data flow into modeling tool(s) and reporting platforms	OMG						



Tasks	Responsible	W 1	W2	W3	W4	W5	W6
	Date	06/11/23	13/11/23	20/11/23	27/11/23	04/12/23	11/12/23
AD TECHNOLOGY							
Codify tagging and taxonomy structures, integrated with Client existing structure and TMM	OMG						
Define taxonomy and tagging requirements by market, media partner, tactic	OMG						
Establish taxonomy and naming conventions aligned to data and reporting governance (if applicable, net new taxonomy requirements)	OMG						
Confirm conversion tracking requirements	OMG						
Confirm list of all ad tech partners across markets	OMG						
Receive read only access to ad tech / media operations partners (e.g. Google Marketing Platform)	OMG						
Ad server network transfer agreement (depending on ownership/contracts): network name, network ID, transfer date, network permissions	OMG						
Receive access to web analytics platforms	OMG						
Receive global access to all digital platforms & ad tech partners	OMG						
INVESTMENT							
Supply AOR letter to all network partners to kick off collection of necessary materials	OMG						
Collect granular level data from incumbent, including clear view on commitments and outstanding bookings	OMG						
Review details of pending or active buys continuing, supply details for any special buys or holds e.g. corporate commitments, multi-media, multi-year, 'grandfather' deals, or legacy positions impacting 2023. Establish effective dates and ownership by element	OMG/ Incumbent						
Gather booked activity to be transitioned/implemented by market/vendor including renegotiation or transfer handovers, volume or duration-based deals, legacy partnerships and client negotiated activity	OMG/ Incumbent						
Collect specific trading issues such as barter credits or any outstanding value or make goods owed to the client or vendors (debts vs credits etc) in CY2022/2023.	OMG/ Incumbent						
Where pricing is a contractual obligation to Client, media partners of agency transition through standard notification process, authorised by Client	OMG / Allianz						
Gather existing (and 3 year historical) booked media plan flowcharts for all media	OMG						
Collaborate with vendors as required for historical data collection and booked media requirements	OMG/ Partners						
Brief on immediate annual and specific H1 activity, including relevant deal/position/volume transfer insights	OMG/ Incumbent						
Provide outline of all 2023 & 2024 activity including plans/negotiations/contractual agreements where relevant	Incumbent						
Compile and review historical cost data to ensure can level-set benchmark foundations	OMG						
Agree format of reporting ensuring transparency and tracking against guarantees, laying out future reporting calendars	OMG						
Finalise productivity methodology with Client, work with 3rd party partner to understand pool makeup/pricing in order to course correct if necessary	OMG / Allianz						
Cross reference flowcharts for quality assurance, confirm transfer of information	OMG						
Final reconciliation with Incumbent, including any outstanding transition items to be clarified	OMG						
Regular cadence of maintenance to confirm delivery on goals	OMG						



Tasks	Responsible	W 1	W2	W3	W4	W5	W6
	Date	06/11/23	13/11/23	20/11/23	27/11/23	04/12/23	11/12/23
INVESTMENT AUDIO							
Supply AOR letter to all Audio (On Air, Streaming Audio, Podcast) vendors to obtain necessary investment documentation	OMG						
Collect granular level data from incumbent, spend/CPMs by vendor, programming/platform/daypart mix, 2021 upfront/planning presentations, flowcharts, summary of commitment deals and outstanding bookings	OMG						
Collaborate with Audio vendors as required for historical data collection	OMG/ Network Partners						
Brief on audio strategy development for annual purchase and any specific transitional activity, including relevant deal/position/volume transfer insights	OMG/ Incumbent						
Gather brand safety guidelines for audio programming/podcasts	OMG						
Gather booked activity to be transitioned/implemented by vendor including renegotiation or transfer handovers, volume or duration-based deals, legacy partnerships and client negotiated activity	OMG						
Outline all 2023 audio activity including flowcharts/plans/negotiations/contractual agreements	Incumbent						
Review details of pending or active audio buys continuing, establish effective dates and ownership of 2023 agreements	OMG						
Set up estimates and packages within platforms	OMG						
Assess / implement immediate tagging needs for Streaming Audio and Podcasts to ensure consistency with current tracking (tagging parameters creation / approval / implementation)	OMG						
Transfer billing and insertion order ownership across media partners	OMG						
Obtain copy of 2022/23 posts with confirmation that makegoods for under deliveries were secured, and nothing is owed to Client	OMG						
Final reconciliation with Incumbent, including any outstanding transition items to be clarified	OMG						
Regular cadence of maintenance to confirm delivery on goals	OMG						
INVESTMENT PRINT							
Supply AOR letter to all Print vendors (Publishing Houses, Independent Publishers) to obtain necessary investment documentation	OMG						
Collect publisher/print investment specific details from incumbent for calendar year 2022/2023 and 2023 including spend/CPMs for titles within applicable Publishing Houses/Independent titles, 2022/23 circulation analysis potential upcoming schedules/campaign flighting, 2023& 2024 recommendations, flowcharts, summary of commitment details and outstanding booked activity	Incumbent						
Confirmation of added value programs, larger program activations	OMG						
Collect and validate brand safety guidelines for print activity	OMG						
Collaborate with Print partners as required for historical data collection and booked media requirements	OMG						
Collect booked activity to be transitioned/implemented by vendor including renegotiation or transfer handovers, volume-based deals, legacy partnerships and client negotiated activity	OMG						
Review details of pending or active print buys continuing, establish effective dates and ownership of 2023 & 2024 agreements	OMG						
Set up estimates and packages within platforms	OMG						
Transfer billing and insertion order ownership across media partners	OMG						
Final reconciliation with Incumbent, including any outstanding transition items to be clarified	OMG						
Regular cadence of maintenance to confirm accurate positioning, print activity running as planned	OMG						

Tasks	Responsible	W 1	W2	W3	W4	W5	W6
	Date	06/11/23	13/11/23	20/11/23	27/11/23	04/12/23	11/12/23
INVESTMENT OOH							
Supply AOR letter to all OOH partners to collect necessary Client buy details	OMG						
Collaborate with OOH partners as required for historical data collection and booked media requirements	OMG/OOH Partners						
Collect granular level data from incumbent, including clear view on commitments and outstanding bookings	OMG						
Brief on any forthcoming annual and specific Q1, 2024 activity, including relevant deal/position/volume transfer insights if applicable	OMG/Incumbent						
Outline all 2023 OOH activity including plans/negotiations/contractual agreements	Incumbent						
Review details of pending or active buys continuing, establish effective dates and ownership of 2023 & 2024 agreements	OMG						
Compile and review historical cost data to ensure can level-set benchmark foundations	OMG						
Agree format of reporting ensuring transparency and tracking against guarantees.	OMG						
Set up estimates and packages within contracting platform	OMG						
Cross reference flowcharts or OOH activity list to prepare takeover contracts	OMG						
Generate and issue OOH takeover contracts to vendor partners	OMG						
Final reconciliation with Incumbent, including confirmation of contract termination dates	OMG						
Regular cadence of maintenance to confirm delivery on goals	OMG						
INVESTMENT SOCIAL							
Receive read access to Social partners and associated pages / handles (Meta, LinkedIn, Twitter, Snap, TikTok, WeChat, Naver, etc.)	OMG/Incumbent						
Receive a list of all social technology and associated access (4C, Sprinklr, etc.)	Incumbent						
Partner with Client & Incumbent to establish financial and budgetary process / cut over across all Social Platforms	OMG/Client/Incumbent						
Execute bulk export of all ad account entities for agency transfer (if required)	OMG						
Execute bulk exporting of historical reporting (depending incumbent engagement)	OMG						
Determine platform tag requirements for Client domains, including new tag placements	OMG / Allianz						
Receive historical campaign reporting, by platform / campaign - perform necessary historical data extractions (depending on account transfer requirements)	Incumbent						
Receive historical content strategies and current content calendars referencing tent-pole, seasonal and always-on campaigns	Allianz						
OMG to rebuild existing campaign entities in new accounts / business manager (as required, where transfers are not confirmed)	OMG						
Assess / implement immediate tagging needs to ensure consistency with current tracking (tagging parameters creation / approval / implementation)	OMG						
Determine any audience integrations and assess custom audience creation where applicable (if new account entities are required)	TBC						
Confirm new ad accounts or new campaign requirements, built out and QA's for all BUs/campaigns	OMG						
Implement custom conversions as required	OMG / Allianz						
Incumbent freeze on all campaign changes (new campaigns, creative, etc.)	OMG						
Remove Incumbent account access from all social platforms, technology, pages / handles	OMG / Allianz						
Set OMG accounts live	OMG / Allianz						



Tasks	Responsible	W 1	W2	W3	W4	W5	W6
	Date	06/11/23	13/11/23	20/11/23	27/11/23	04/12/23	11/12/23
INVESTMENT DIGITAL VIDEO, DISPLAY, PROGRAMMATIC							
OMG to receive read only access to associated global and local DSP seat(s) for transfer (DV360, TTD, AAP etc.)	OMG						
Client brand safety guidelines delivered to OMG	OMG						
Receive historical campaign reporting, by business unit / platform / campaign	OMG						
Receive business unit / campaign / platform audience and data strategies	OMG						
Receive business unit / campaign content calendars	OMG						
If transfers declined, receive platform extractions and media plan detail for architecture rebuild	OMG / Incumbent						
Platform architecture rebuild / retraffic of media requirements	OMG						
Develop inclusion + exclusion list aligned to OMG enterprise lists and Client guidelines	OMG						
Assess / implement immediate tagging needs to ensure consistency with current tracking (tagging parameters creation / approval / implementation)	OMG						
OMG to partner with Client to establish financial and budgetary process / cut over across all insertion orders	OMG						
Review direct partner media plans and custom content requirements, if applicable	OMG/ Incumbent						
Transfer billing and insertion order ownership across media partners (direct IO requirements)	OMG						
Incumbent freeze on all campaign changes (campaign launches, etc.)	OMG						
OMG to partner with Client to reconcile spend in accordance with agreed budgetary cutover (if necessary)	OMG						
Remove Incumbent account access in the event accounts are transferred to OMG	OMG						
Remove Incumbent account access to Google Marketing Platform and associated ad server networks	OMG						
Set OMG accounts / billing live	OMG						
INVESTMENT SEARCH							
OMG to receive read access to Google Search Ads / management platform / tech platforms (e.g. Skai, SA360, Google Merchant Center etc.) from Client	OMG / Allianz						
OMG to receive read only access to all search engine accounts from Incumbents (Google Ads, Bing, Amazon, Baidu, Yahoo etc.)	OMG						
OMG to receive list and access as required to extended partner list (e.g. affiliates, feed management partners)	OMG / Allianz						
Execute comprehensive audit of Search/Shopping/Affiliate execution and implementation to consult on digital transformation and maturity mapping, (based on Client in-house model and desire for consult)	OMG						
Assess tagging and taxonomy needs to ensure consistency across channels for data operations and reporting requirements	OMG						
OMG to partner with Client to establish financial and budgetary process / cut over across all Search insertion orders (if required)	OMG						
Confirm date and time of transition to transfer billing / account ownership	OMG						
Receive past historical campaign reporting, by search engine / campaign / ad group / ad copy / keyword (if access is not granted)	OMG						
Align MCC architecture to required Client global structure	OMG						
Confirm billing is aligned to MCC architecture, review local billing requirements	OMG						
Assess / implement immediate tagging needs to ensure consistency with current tracking (tagging parameters creation/approval/implementation)	OMG						
Incumbent freeze on all campaign changes (bid, ad copy, keywords, new campaigns, etc.)	OMG						
OMG to partner with Client to reconcile spend in accordance with agreed budgetary cutover	OMG						
Remove Incumbent account access upon Search Engine account(s) transfer to OMG	OMG						
Remove Incumbent account access to Google Search Ads 360	OMG						
Set accounts / billing live	OMG						



Tasks	Responsible	W 1	W2	W3	W4	W5	W6
	Date	06/11/23	13/11/23	20/11/23	27/11/23	04/12/23	11/12/23
DATA OPERATIONS TAXONOMY & GOVERNANCE							
Identify existing taxonomy definition developed and used by the Client teams	OMG						
Review existing measurement framework (if available)	OMG						
Identify taxonomy requirements by channel and local Sepkets	OMG						
Establish taxonomy and naming conventions aligned to data and reporting governance	OMG						
Prepare data ops blueprint with agency based on available information	OMG						
Develop the data QA, compliance and governance rules	OMG / Allianz						
Configure taxonomy Builder as per the requirements agreed with agency team and Client	OMG						
Create Taxonomy Builder Training Docs	OMG						
Client to sign off on Taxonomy Builder training docs	OMG / Allianz						
Provide local Market trainings on Taxonomy Builder Tool & How to extract Campaign and Creative Names from Placement	OMG						
DATA OPERATIONS TACTICAL WORKFLOW							
Identify technical configuration team for Tactical Workflow	OMG						
Identify requirements to create schematic media templates within tactical workflow	OMG						
Identify and document workflow templates required by Allianz to be created within Tactical Workflow	OMG / Allianz						
Schematic Template Build and global workflow template to be completed for Tactical Workflow	OMG						
Testing, training and deployment of standard schematic implementation of Tactical Workflow	OMG						
DATA OPERATIONS DATA QA AND DELIVERY							
Capture list of media and creative platforms to gather data from	OMG						
Pre-work for discovery workshops with agency and client stakeholders	OMG / Allianz						
Receive trainings on Client tools and tech from relevant Client teams	OMG / Allianz						
Datorama and other reporting tech Deep Dive	OMG						
Standup and introduce initial offshore data operations team	OMG						
Receive reporting (minimum) access to ad tech and media operations partner platforms (client owned)	OMG / Allianz						
Receive reporting (minimum) access to ad tech and media operations partner platforms (OMG owned)	OMG						
Onboard offshore data ops team on measurement framework and reporting requirements	OMG						
Develop project plan and get agency sign-off to begin with build	OMG						
Design and implement data connectors, data pipelines and dashboards for basic performance reports/dashboards	OMG						
Ensure quality assurance checks are conducted before go-live	OMG						
Define quality framework to be followed as part of ongoing delivery	OMG						
Audit workflow to check for any deviations	OMG						

2

Tranche 2 Markets

March – June 2024



Timeline & Plan

Timeline is further customised in collaboration with Allianz through business discovery sessions. This timeline is to be tailored based on Allianz prospective transition schedule and dates (pending confirmation on agency effective date).

Tasks	Responsible	W 1	W 2	W 3	W 4	W 5	W 6	W 7	W 8	W 9	W 10	W 11	W 12	W 13	W 14
	2024 Date	04/03	11/03	18/03	25/03	01/04	08/04	15/04	22/04	29/04	06/05	13/05	20/05	27/05	03/06
TRANSITION PROJECT MANAGEMENT															
Transition Kick Off Meeting for Tranche 2 (OMG Transition Team Mobilisation)	OMG / Allianz														
Align on OMG transition scope and expectations with Client	OMG / Allianz														
Align on transition checkpoints and milestones with Client	OMG / Allianz														
Transition weekly update with OMG Transition Leads + Client	OMG / Allianz														
2X Weekly transition status call with Incumbent (and Client if required)	OMG / Incumbent														
Weekly transition status materials, and information transfer tracking produced and circulated to Client and Incumbent	OMG														
Weekly Local Market transition status & materials produced and circulated to Client & all OMG Teams	OMG / Allianz														
Bi-weekly OMG talent recruitment and staffing call with OMG + Client	OMG / Allianz														
Key workstream transfer - breakout meetings (scheduled as required)	OMG / Incumbent														
OMG introduction, pitch promise, and team review with extended Client team(s) - socialising with extended stakeholders	OMG / Allianz														
STAFFING AND REMUNERATION															
Finalise team structure, fees and FTEs	OMG														
Scope, staffing, and remuneration approval	Allianz														
AGENCY HANDOVER & LEGAL															
Receipt of Agency of Record letter	OMG														
Modification of Agency of Record letter (if required)	Allianz														
Provision Of Partner Contact Information And Organograms (Creative, Publisher, Platform Partners Etc.)	Incumbent / Allianz														
Confirm Incumbent transition scope and timing (campaign calendar identified for planning, buying)	Allianz														
Confirm effective planning/buying transition dates	OMG / Allianz														
OMG transition scope to be agreed and confirmed as required	OMG / Allianz														
OMG agreements to be finalised with Client	OMG														
Establish effective dates for transition of access points across technology platforms (address transfer agreements as required)	OMG														
FINANCIAL SYSTEMS & PROCESSES															
OMG to have arranged credit insurance and highlight additional documentation needed from Client	OMG														
OMG to have highlighted additional documentation needed from Client if more is needed	OMG														
OMG to supply information required to be set up as a vendor at Client	OMG														
Finalise booking and approval process	OMG														
Finalise finance (invoicing/billing) process, by local market as required	OMG														
Establish product & billing codes, open billing estimates	OMG														
All new local vendor boarding complete	OMG														



Tasks	Responsible	W 1	W 2	W 3	W 4	W 5	W 6	W 7	W 8	W 9	W 10	W 11	W 12	W 13	W 14	
	2024 Date	04/03	11/03	18/03	25/03	01/04	08/04	15/04	22/04	29/04	06/05	13/05	20/05	27/05	03/06	
AGENCY IMMERSION																
Business and Brand Immersion meetings with Client (Business Goals, Campaigns Overview, Target Audiences, Key Learnings)	OMG / Allianz															
Client regulatory, processes and other mandatory agency training	OMG															
Formal handover with Incumbent team for alignment on planning information and account handover	OMG															
Global data and information transfer request scope agreed and briefed out to Incumbent team	OMG															
Partner agency immersions for OMG team (creative, publisher, network, platform partners etc.)	Partner Agencies															
Confirm ongoing processes with creative and partner agencies	Partner Agencies															
Global data and information transfer request to be delivered to OMG team	Incumbent															
CAMPAIGN BRIEFING & PLANNING																
Primary review of 2024/current activity to be managed by OMG	Allianz															
Agreement of 2024 current activity to be managed by OMG/Incumbent during transition	Incumbent/ OMG															
Establish briefing process, provide briefing templates	OMG															
2024 H2 campaigns briefed to OMG (timing dependent on campaign lifecycle and cadence)	Allianz															
Marketing and content calendar debrief	Allianz															
Cascade of global strategies to OMG Local Teams	OMG															
Establish effective dates with Client (overall, exclusive to campaign, and/or channels where required)	OMG															
PARTNER JOINT BUSINESS PLANNING																
Kickoff / immersion meetings with digital partners for historical background	OMG															
Outline of JBP requirements with key partners and Client as required	OMG / Media Partners / Client															
Delivery and alignment on partner -level JBP frameworks	OMG / Media Partners															
Define partner JBP commitments, detail, test and learn agendas etc.	OMG / Media Partners / Allianz															
Confirm alignment and finalise JBP agreements with Client and partners	OMG / Media Partners / Allianz															
MEASUREMENT, REPORTING, DATA TRANSFER																
Provide associated measurement frameworks across markets/campaigns	OMG															
Define benchmark key performance indicators, optimisation metrics and diagnostic metrics by brand/business unit, channel and tactic	OMG															
Performance reporting details (style / format / cadence / Client preferences)	OMG															
Provide historical reporting templates, study outputs and data (preferably covering previous 3 years) – by market and campaign	OMG/ Incumbent															
Define historical data requirements to confirm 100% data preservation	OMG															
Perform data extract and codify historical data (2020-current) across platforms and partners, per requirements, confirm no data gaps are present	OMG															
Define and provide access to web analytics and / or attribution partners utilised	OMG															
Define data sources for modeling (MTA, MMM)	OMG															
Brand and conversion study measurement partners utilised	OMG															
Align on process for management of data flow into modeling tool(s) and reporting platforms	OMG															

Tasks	Responsible	W 1	W 2	W 3	W 4	W 5	W 6	W 7	W 8	W 9	W 10	W 11	W 12	W 13	W 14
	2024 Date	04/03	11/03	18/03	25/03	01/04	08/04	15/04	22/04	29/04	06/05	13/05	20/05	27/05	03/06
AD TECHNOLOGY															
Codify tagging and taxonomy structures, integrated with Client existing structure and TMM	OMG														
Define taxonomy and tagging requirements by market, media partner, tactic	OMG														
Establish taxonomy and naming conventions aligned to data and reporting governance (if applicable, net new taxonomy requirements)	OMG														
Confirm conversion tracking requirements	OMG														
Confirm list of all ad tech partners across markets	OMG														
Receive read only access to ad tech / media operations partners (e.g. Google Marketing Platform)	OMG														
Ad server network transfer agreement (depending on ownership/contracts): network name, network ID, transfer date, network permissions	OMG														
Receive access to web analytics platforms	OMG														
Receive global access to all digital platforms & ad tech partners	OMG														
INVESTMENT															
Supply AOR letter to all network partners to kick off collection of necessary materials	OMG														
Collect granular level data from incumbent, including clear view on commitments and outstanding bookings	OMG														
Review details of pending or active buys continuing, supply details for any special buys or holds e.g. corporate commitments, multi-media, multi-year, 'grandfather' deals, or legacy positions impacting 2024. Establish effective dates and ownership by element	OMG/ Incumbent														
Gather booked activity to be transitioned/implemented by market/vendor including renegotiation or transfer handovers, volume or duration-based deals, legacy partnerships and client negotiated activity	OMG/ Incumbent														
Collect specific trading issues such as barter credits or any outstanding value or make goods owed to the client or vendors (debts vs credits etc) in 2023/2024.	OMG/ Incumbent														
Where pricing is a contractual obligation to Client, media partners of agency transition through standard notification process, authorised by Client	OMG / Allianz														
Gather existing (and 3 year historical) booked media plan flowcharts for all media	OMG														
Collaborate with vendors as required for historical data collection and booked media requirements	OMG/ Partners														
Brief on immediate annual and specific Q3 activity, including relevant deal/position/volume transfer insights	OMG/ Incumbent														
Provide outline of all 2024 activity including plans/negotiations/contractual agreements where relevant	Incumbent														
Compile and review historical cost data to ensure can level-set benchmark foundations	OMG														
Agree format of reporting ensuring transparency and tracking against guarantees, laying out future reporting calendars	OMG														
Finalise productivity methodology with Client, work with 3rd party partner to understand pool makeup/pricing in order to course correct if necessary	OMG / Allianz														
Cross reference flowcharts for quality assurance, confirm transfer of information	OMG														
Final reconciliation with Incumbent, including any outstanding transition items to be clarified	OMG														
Regular cadence of maintenance to confirm delivery on goals	OMG														

Tasks	Responsible	W 1	W 2	W 3	W 4	W 5	W 6	W 7	W 8	W 9	W 10	W 11	W 12	W 13	W 14
	2024 Date	04/03	11/03	18/03	25/03	01/04	08/04	15/04	22/04	29/04	06/05	13/05	20/05	27/05	03/06
INVESTMENT AUDIO															
Supply AOR letter to all Audio (On Air, Streaming Audio, Podcast) vendors to obtain necessary investment documentation	OMG														
Collect granular level data from incumbent, spend/CPMs by vendor, programming/platform/daypart mix, 2021 upfront/planning presentations, flowcharts, summary of commitment deals and outstanding bookings	OMG														
Collaborate with Audio vendors as required for historical data collection	OMG/ Network Partners														
Brief on audio strategy development for annual purchase and any specific transitional activity, including relevant deal/position/volume transfer insights	OMG/ Incumbent														
Gather brand safety guidelines for audio programming/podcasts	OMG														
Gather booked activity to be transitioned/implemented by vendor including renegotiation or transfer handovers, volume or duration-based deals, legacy partnerships and client negotiated activity	OMG														
Outline all 2024 audio activity including flowcharts/plans/negotiations/contractual agreements	Incumbent														
Review details of pending or active audio buys continuing, establish effective dates and ownership of 2024 agreements	OMG														
Set up estimates and packages within platforms	OMG														
Assess / implement immediate tagging needs for Streaming Audio and Podcasts to ensure consistency with current tracking (tagging parameters creation / approval / implementation)	OMG														
Transfer billing and insertion order ownership across media partners	OMG														
Obtain copy of 2023/24 posts with confirmation that makegoods for under deliveries were secured, and nothing is owed to Client	OMG														
Final reconciliation with Incumbent, including any outstanding transition items to be clarified	OMG														
Regular cadence of maintenance to confirm delivery on goals	OMG														
INVESTMENT PRINT															
Supply AOR letter to all Print vendors (Publishing Houses, Independent Publishers) to obtain necessary investment documentation)	OMG														
Collect publisher/print investment specific details from incumbent for calendar year 22/2023 and 2024 including spend/CPMs for titles within applicable Publishing Houses/Independent titles, 2023/24 circulation analysis potential upcoming schedules/campaign flighting, 2024 recommendations, flowcharts, summary of commitment details and outstanding booked activity	Incumbent														
Confirmation of added value programs, larger program activations	OMG														
Collect and validate brand safety guidelines for print activity	OMG														
Collaborate with Print partners as required for historical data collection and booked media requirements	OMG														
Collect booked activity to be transitioned/implemented by vendor including renegotiation or transfer handovers, volume-based deals, legacy partnerships and client negotiated activity	OMG														
Review details of pending or active print buys continuing, establish effective dates and ownership of 2024 agreements	OMG														
Set up estimates and packages within platforms	OMG														
Transfer billing and insertion order ownership across media partners	OMG														
Final reconciliation with Incumbent, including any outstanding transition items to be clarified	OMG														
Regular cadence of maintenance to confirm accurate positioning, print activity running as planned	OMG														



Tasks	Responsible	W 1	W 2	W 3	W 4	W 5	W 6	W 7	W 8	W 9	W 10	W 11	W 12	W 13	W 14
	2024 Date	04/03	11/03	18/03	25/03	01/04	08/04	15/04	22/04	29/04	06/05	13/05	20/05	27/05	03/06
INVESTMENT OOH															
Supply AOR letter to all OOH partners to collect necessary Client buy details	OMG														
Collaborate with OOH partners as required for historical data collection and booked media requirements	OMG/OOH Partners														
Collect granular level data from incumbent, including clear view on commitments and outstanding bookings	OMG														
Brief on any forthcoming annual and specific Q3, 2024 activity, including relevant deal/position/volume transfer insights if applicable	OMG/Incumbent														
Outline all 2024 OOH activity including plans/negotiations/contractual agreements	Incumbent														
Review details of pending or active buys continuing, establish effective dates and ownership of 2024 agreements	OMG														
Compile and review historical cost data to ensure can level-set benchmark foundations	OMG														
Agree format of reporting ensuring transparency and tracking against guarantees.	OMG														
Set up estimates and packages within contracting platform	OMG														
Cross reference flowcharts or OOH activity list to prepare takeover contracts	OMG														
Generate and issue OOH takeover contracts to vendor partners	OMG														
Final reconciliation with Incumbent, including confirmation of contract termination dates	OMG														
Regular cadence of maintenance to confirm delivery on goals	OMG														
INVESTMENT SOCIAL															
Receive read access to Social partners and associated pages / handles (Meta, LinkedIn, Twitter, Snap, TikTok, WeChat, Naver, etc.)	OMG/Incumbent														
Receive a list of all social technology and associated access (4C, Sprinklr, etc.)	Incumbent														
Partner with Client & Incumbent to establish financial and budgetary process / cut over across all Social Platforms	OMG/Client/Incumbent														
Execute bulk export of all ad account entities for agency transfer (if required)	OMG														
Execute bulk exporting of historical reporting (depending incumbent engagement)	OMG														
Determine platform tag requirements for Client domains, including new tag placements	OMG/Allianz														
Receive historical campaign reporting, by platform / campaign - perform necessary historical data extractions (depending on account transfer requirements)	Incumbent														
Receive historical content strategies and current content calendars referencing tent-pole, seasonal and always-on campaigns	Allianz														
OMG to rebuild existing campaign entities in new accounts / business manager (as required, where transfers are not confirmed)	OMG														
Assess / implement immediate tagging needs to ensure consistency with current tracking (tagging parameters creation / approval / implementation)	OMG														
Determine any audience integrations and assess custom audience creation where applicable (if new account entities are required)	TBC														
Confirm new ad accounts or new campaign requirements, built out and QA's for all BUs/campaigns	OMG														
Implement custom conversions as required	OMG / Allianz														
Incumbent freeze on all campaign changes (new campaigns, creative, etc.)	OMG														
Remove Incumbent account access from all social platforms, technology, pages / handles	OMG / Allianz														
Set OMG accounts live	OMG / Allianz														



Tasks	Responsible	W 1	W 2	W 3	W 4	W 5	W 6	W 7	W 8	W 9	W 10	W 11	W 12	W 13	W 14
	2024 Date	04/03	11/03	18/03	25/03	01/04	08/04	15/04	22/04	29/04	06/05	13/05	20/05	27/05	03/06
INVESTMENT DIGITAL VIDEO, DISPLAY, PROGRAMMATIC															
OMG to receive read only access to associated global and local DSP seat(s) for transfer (DV360, TTD, AAP etc.)	OMG														
Client brand safety guidelines delivered to OMG	OMG														
Receive historical campaign reporting, by business unit / platform / campaign	OMG														
Receive business unit / campaign / platform audience and data strategies	OMG														
Receive business unit / campaign content calendars	OMG														
If transfers declined, receive platform extractions and media plan detail for architecture rebuild	OMG / Incumbent														
Platform architecture rebuild / retrafficing of media requirements	OMG														
Develop inclusion + exclusion list aligned to OMG enterprise lists and Client guidelines	OMG														
Assess / implement immediate tagging needs to ensure consistency with current tracking (tagging parameters creation / approval / implementation)	OMG														
OMG to partner with Client to establish financial and budgetary process / cut over across all insertion orders	OMG														
Review direct partner media plans and custom content requirements, if applicable	OMG / Incumbent														
Transfer billing and insertion order ownership across media partners (direct IO requirements)	OMG														
Incumbent freeze on all campaign changes (campaign launches, etc.)	OMG														
OMG to partner with Client to reconcile spend in accordance with agreed budgetary cutover (if necessary)	OMG														
Remove Incumbent account access in the event accounts are transferred to OMG	OMG														
Remove Incumbent account access to Google Marketing Platform and associated ad server networks	OMG														
Set OMG accounts / billing live	OMG														
INVESTMENT SEARCH															
OMG to receive read access to Google Search Ads / management platform / tech platforms (e.g. Skai, SA360, Google Merchant Center etc.) from Client	OMG / Allianz														
OMG to receive read only access to all search engine accounts from Incumbents (Google Ads, Bing, Amazon, Baidu, Yahoo etc)	OMG														
OMG to receive list and access as required to extended partner list (e.g. affiliates, feed management partners)	OMG / Allianz														
Execute comprehensive audit of Search/Shopping/Affiliate execution and implementation to consult on digital transformation and maturity mapping, (based on Client in-house model and desire for consult)	OMG														
Assess tagging and taxonomy needs to ensure consistency across channels for data operations and reporting requirements	OMG														
OMG to partner with Client to establish financial and budgetary process / cut over across all Search insertion orders (if required)	OMG														
Confirm date and time of transition to transfer billing / account ownership	OMG														
Receive past historical campaign reporting, by search engine / campaign / ad group / ad copy / keyword (if access is not granted)	OMG														
Align MCC architecture to required Client global structure	OMG														
Confirm billing is aligned to MCC architecture, review local billing requirements	OMG														
Assess / implement immediate tagging needs to ensure consistency with current tracking (tagging parameters creation/approval/implementation)	OMG														
Incumbent freeze on all campaign changes (bid, ad copy, keywords, new campaigns, etc.)	OMG														
OMG to partner with Client to reconcile spend in accordance with agreed budgetary cutover	OMG														
Remove Incumbent account access upon Search Engine account(s) transfer to OMG	OMG														
Remove Incumbent account access to Google Search Ads 360	OMG														
Set accounts / billing live	OMG														

Tasks	Responsible	W 1	W 2	W 3	W 4	W 5	W 6	W 7	W 8	W 9	W 10	W 11	W 12	W 13	W 14
	2024 Date	04/03	11/03	18/03	25/03	01/04	08/04	15/04	22/04	29/04	06/05	13/05	20/05	27/05	03/06
DATA OPERATIONS TAXONOMY & GOVERNANCE															
Identify existing taxonomy definition developed and used by the Client teams	OMG														
Review existing measurement framework (if available)	OMG														
Identify taxonomy requirements by channel and local Sepkets	OMG														
Establish taxonomy and naming conventions aligned to data and reporting governance	OMG														
Prepare data ops blueprint with agency based on available information	OMG														
Develop the data QA, compliance ad governance rules	OMG / Allianz														
Configure taxonomy Builder as per the requirements agreed with agency team and Client	OMG														
Create Taxonomy Builder Training Docs	OMG														
Client to sign off on Taxonomy Builder training docs	OMG / Allianz														
Provide local Market trainings on Taxonomy Builder Tool & How to extract Campaign and Creative Names from Placement	OMG														
DATA OPERATIONS TACTICAL WORKFLOW															
Identify technical configuration team for Tactical Workflow	OMG														
Identify requirements to create schematic media templates within tactical workflow	OMG														
Identify and document workflow templates required by Allianz to be created within Tactical Workflow	OMG / Allianz														
Schematic Template Build and global workflow template to be completed for Tactical Workflow	OMG														
Testing, training and deployment of standard schematic implementation of Tactical Workflow	OMG														
DATA OPERATIONS DATA QA AND DELIVERY															
Capture list of media and creative platforms to gather data from	OMG														
Pre-work for discovery workshops with agency and client stakeholders	OMG / Allianz														
Receive trainings on Client tools and tech from relevant Client teams	OMG / Allianz														
Datorama and other reporting tech Deep Dive	OMG														
Standup and introduce initial offshore data operations team	OMG														
Receive reporting (minimum) access to ad tech and media operations partner platforms (client owned)	OMG / Allianz														
Receive reporting (minimum) access to ad tech and media operations partner platforms (OMG owned)	OMG														
Onboard offshore data ops team on measurement framework and reporting requirements	OMG														
Develop project plan and get agency sign-off to begin with build	OMG														
Design and implement data connectors, data pipelines and dashboards for basic performance reports/dashboards	OMG														
Ensure quality assurance checks are conducted before go-live	OMG														
Define quality framework to be followed as part of ongoing delivery	OMG														
Audit workflow to check for any deviations	OMG														

07

Track Record of Transition Excellence

Unparalleled Experience
and Expertise



Transition Expertise

Our Global Transition Experience and Expertise is unparalleled.

Our industry-leading institutional knowledge and OMG Global Transition Playbook is built from a foundation of having transitioned iconic, scaled, global clients, and developing hybrid onboarding models for clients with robust capabilities enabled within the in-house organisation.

Our depth and breadth of experience managing scaled Global Transitions confirms confidence in team management and deploys a proven, streamlined transition processes. We thrive in incredibly fast-paced and complex situations and consistently deliver on time, mitigating any risk and disruption to day-to-day business operations.

The following are a selection of our most recent and relevant transitions:



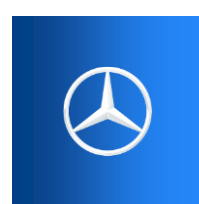
- 60-business day Global Transition, accounting for \$47M in transition media investment orchestrated across 60+ markets
- Multi-channel transition and launch of 723 marketing campaigns across: TV, Print, OOH, Digital
- Transfer, analysis, and re-plan/review of 100+ incumbent agency files inclusive of plan information and tactical detail
- Architected an integrated digital taxonomy across all active markets and in collaboration with six active regional in-house digital hubs
- Managed 500+ transition meetings across 700+ participants including client and local teams
- Hiring and onboarding a Business Team of 596 FTEs 1 integrated Omnicom team across all marketing communications disciplines, including an embedded in-house digital 'HUB' team, scaling an efficient global delivery hub



- 60-day transition period accounting for \$300M+ in spend across six WDTV Networks
- 35+ brands, supporting promos + premieres, requiring individual planning and execution across all Digital channels
- Re-costed plans, which experienced immediate efficiency gains with Omnicom Media Group negotiated rates vs. incumbent



- 83-day transition period accounting for \$500M+ in spend
- Deploying and setting teams across 53+ markets
- 18 Category Business Units, requiring individual planning and execution across all media channels
- 470 team members in place from Day 1



- 68 - business day Transition from Appointment to Handover, accounting for \$350M in transition media investment orchestrated across 43 markets
- Setting up teams supporting 16 Daimler Business Units across 43 markets, onboarding 6 key media disciplines
- Multi-channel transition and launch of 228 marketing campaigns across traditional & digital channels in the first month
- Architected & deployed a unified global ad tech stack, integrated digital taxonomy & performance reporting dashboard. In collaboration with Mercedes-Benz Global & Regional media teams
- Managed 150+ transition meetings across 20+ external participants including Global, Regional, Local Mercedes-Benz Business Units, Auditors, Key Vendors and Partners
- Deployed a SWAT Transition Team of 25+ HQ resources and Local Market Leads in each Market, hiring and onboarding a Business Team of 114+ FTEs
- Delivering complete transparency to Mercedes-Benz on global media investment

A close-up photograph of a woman with long dark hair kissing a brown and black French Bulldog on the cheek. The dog is lying down, wrapped in a grey blanket, and has its eyes closed. A hand is visible resting on the dog's head. The entire image has a blue color overlay.

Thank You

Allianz  | **OMG**