

## At-a-Glance Checklist: Phase I

**Phase I**

1 Week  
Production  
Alignment

Project Name:  
Project Lead(s):  
Project Start Date:  
Project End Date:  
Agency:  
Agency Contacts:


### Checklist: Action Items

- Format specs for each required element
- Master calendar with ship dates
- Creative approach and timing alignment for shared assets
- Casting specs
- Wardrobe specs
- Location specs
- Talent usage rights
- Music brief
- Music budget range
- Direct production budget range
- Hero product or service list
- Hero product or service specifications
- Security protocol specs
- Translations, align on who will do them (the agency partner or individual regions)
- Approved creative scripts
- Timed agency storyboards

### Notes

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## At-a-Glance Checklist: Phase II

**Phase II**  
3–4 Weeks  
Production  
Prep

Project Name:  
Project Start Date:  
Project End Date:  
Agency:  
Agency Contacts:


### Action Items

- Director options, including treatments and reels
- Direct production costs, estimate sign-off
- Award job

### Notes

## At-a-Glance Checklist: Phase III

**Phase III**  
2–3 Weeks  
Pre-  
Production

Project Name:  
Project Start Date:  
Project End Date:  
Agency:  
Agency Contacts:


### Action Items

- |                          |   |
|--------------------------|---|
| <input type="checkbox"/> | Casting options   |
| <input type="checkbox"/> | Wardrobe options  |
| <input type="checkbox"/> | Location options  |
| <input type="checkbox"/> | Music track options   |
| <input type="checkbox"/> | PPM (pre-production meeting)  |
| <input type="checkbox"/> | - Storyboards for review and discussion                                     |
| <input type="checkbox"/> | - Product or service review   |
| <input type="checkbox"/> | - Casting/wardrobe/location/props/hair & makeup                             |
| <input type="checkbox"/> | - Wardrobe session  |
| <input type="checkbox"/> | - Any other outstanding items to be discussed and resolved prior to filming |

### Notes

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## At-a-Glance Checklist: Phase IV

**Phase IV**  
1 Week  
Production

Project Name:  
Project Start Date:  
Project End Date:  
Agency:  
Agency Contacts:


### Action Items

- Production Company provides shot lists for each day
- Agency and advertiser track and align on performance takes for each scene
- Collaborative dialog between advertiser, agency, and director
- Advertiser provides technical instructions for product or service to be filmed
- Wardrobe, hair, makeup (final tweaks only before filming each scene)
- Scene set-ups (final tweaks only before filming each scene)

### Notes

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## At-a-Glance Checklist: Phase V

<b>Phase V</b>	Project Name:	
	Project Start Date:	
6–8 Weeks	Project End Date:	
Post-Production	Agency:	
	Agency Contacts:	

### Editing Action Items

- Align key review and approval dates
- Set internal review meetings based on calendar dates
- Provide consolidated feedback at each rough-cut review
- Provide final approval for locked picture (fixed visual edit) before moving to the finishing phase of the post-production process

### Finishing Action Items

- Confirm final film element specifications
- Align key review and approval dates
- Set internal review meetings based on calendar dates
- Provide consolidated feedback at each rough-cut review
- Provide final approval to ship ads

### Notes

## At-a-Glance Checklist: Phase VI

### Phase VI

1–2 Weeks

Trafficking &  
Distribution

Project Name:

Project Start Date:

Project End Date:

Agency:

Agency Contacts:


### Action Items

- Approve final assets to be uploaded
- Communicate distribution details to agency partner and internal or external advertiser teams

### Notes

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## At-a-Glance Checklist: Phase VII

### Phase VII

1 Week

Post-Evaluation

Project Name:

Project Start Date:

Project End Date:

Agency:

Agency Contacts:


### Action Items

- Gather internal feedback on process experiences
- Meet with agency partners to review, discuss, align
- Summarize process optimization ideas, gain alignment to implement for next campaign project

### Notes

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## At-a-Glance Checklist: Phase VIII

<b>Phase VIII</b> 8–16 Weeks Job Reconciliation & Close-Out	Project Name:	
	Project Start Date:	
	Project End Date:	
	Agency:	
	Agency Contacts:	

### Action Items

- Agency reconciles actual direct production costs by line item
- Agency provides a final cost report that includes:
  - Original costs, overages, underages, and actuals
  - PO report with actuals by line item and corresponding third-party vendor paid invoices
- Applicable travel expenses are submitted for each agency, including all eligible receipts corresponding to the approved trips
- Once all costs are aligned, the project is closed, and final 25 percent of funds are released for vendor payment

### Notes



