

Ep 56: How to Successfully Vet a Marketing Agency

What to look for and ask to protect your business



- o Be more concerned with HOW they work versus WHO they have worked with.
 - o Don't get sucked in by the list of "previous clients". Agencies have a tendency to exaggerate this list.
 - o Be concerned more with their process. Do they appreciate collaboration across functions, take initiative like owners of the brand, share even if not fully baked so they can get feedback.
 - o Your list may be different, but the point is to have criteria for evaluating what type of work style is going to be the most conducive to delivering against your objectives.
 - o From the agency side: How the potential client works is so important and can make or break the relationship. It is important to assess whether what they say is really how they work.
- o Make sure they clearly identify a team and ask for credentials.
 - o It isn't unusual for agencies to bring the A team to dazzle you and then switch to the C team in execution. You want to be able to weigh in on your team.
 - o Make sure you get the right people you need. Put thought into who you think you will need based on the type of work and results you desire. Ask the agency you are vetting for the roles they feel are needed to do the work, who will fill them and their credentials. Then have a conversation about whether your team is suitable or not.
 - o From the agency side: Is this really a client team you want to work with and for?
- o Ask for case studies that are representative of the type of work you desire AND ask for business results.
 - o Make sure the work you want is a competency of the agency and/or the people who work there.
 - o When they share case studies look deeper than just the KPI's they share to see if the work delivers on the intangibles you need.
 - o Always ask for how the work impacted their client's business. Look for how they answer as much as what they answer.
 - o From the agency side: Terms are not apples to apples but more apples to oranges. Make sure you are clear on the ask, you are vetting them too! Look at their case studies, expectations with agencies in the past, do they actually have a brief? Look at their business results as proof they are putting their money where their mouth is.
- o Make sure the agency commits to budget, timing and scope via a signed-off proposal.
 - o This is critical because this is your contract and your only leverage. If the agency wants to leave the scope vague, this is a big red flag.
 - o Make sure deliverables are clear. Compensation should be based on delivery on quality deliverables.
 - o If you don't understand terms, words, ANYTHING, ask for clarity and make sure it is incorporated.
 - o Make sure it is signed.
 - o From the agency side: Review budget and scope regularly. No surprises internally and externally. Keep time sheets and deliverables up to date and let the client know where they are with the scope.
 - o Have regular touch base meetings to avoid the client feeling like they are being nickel and dimed. This also allows you both to come to the table with where you are, how deliverables are being met, where things may have slipped and who is responsible if there are overages.

Areas to address immediately are:

1. _____

2. _____

3. _____

Action Plan:

Action	Timing	Progress	Complete