

THE ULTIMATE MARKETING AGENCY REPORT CARD.



The Inside Scoop
on How Clients Rate
the Effectiveness
of Their Agency
Partners

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THE ULTIMATE MARKETING AGENCY REPORT CARD.

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INTRODUCTION.

According to a [2012 study conducted by the Chief Marketing Officer Council](#), only 9% of surveyed senior marketers “believe traditional ad agencies are doing a good job of evolving and extending their service capabilities in the digital age,” whereas 22% believe their agencies are struggling to transition their business models and service offerings. 51% of the 250+ senior marketers surveyed think their agencies are “playing catch-up” -- bolting on different aspects of digital marketing without taking an integrated approach.

Here’s the thing: marketers aren’t looking for agencies playing catch up. In fact, we talked to several of our customers who work with agencies to verify what attributes they look for when evaluating an agency’s performance or partnership potential.

The following 8 criteria is what they came up with.

**THE 8 CRITERIA
MARKETERS
USE TO
EVALUATE
AN AGENCY.**

1 Trust and Credibility.

You should want to work with agencies that practice what they preach. Agencies lacking a social media presence, a blog, and some irresistible content to fuel a solid story about how they attract new business through inbound channels is one surefire way to turn prospective clients away. Not having authentic references is another: “As we all know, reading a review online from a trusted source or speaking directly to an existing, happy customer can really seal the deal,” says Karen Jimenez, Director of Marketing at [Capsule Tech](#).

Furthermore, marketers like you are smart. You Google. You check out agency websites. You look to see if agencies walk the talk:

“When evaluating any company the first thing I do is look at their website and social media presence. I Google to see if I can find them online and evaluate how well their website is optimized for search engines. Occasionally I even ask what content they use to drive traffic to their site to see how well they do inbound marketing for their own business.”

- Erin Wasson, VP of Marketing, [UrbanBound](#)

2 Compatibility.

Compatibility in the client-agency relationship is two-fold: agencies should have a cultural vibe that works well with your team, but they should also have the right experience -- proven success working in your industry. Chad Reinholz of [HindSite Software](#) explains it this way:

“ I’d want proven success in my industry. An agency that works with primarily B2C customers probably won’t be a good fit for my B2B business. Likewise, a company with a strong tradition of helping food brands probably won’t be a good fit with my software company. We’ve worked intensively with a marketing consultant with roots in our industry who also consult with many members of our target audience. We couldn’t get the same level of insight from an agency that didn’t have those roots. To understand our market, you have to have experienced it before. ”

In addition to industry experience, Julie Montgomery of [Plexent](#) looks for agency partners who are like-minded culturally: “Working in marketing is like playing a sport. For any external partner, we look for teammates who have passion, spark and ongoing curiosity.”

3 Pricing and Value.

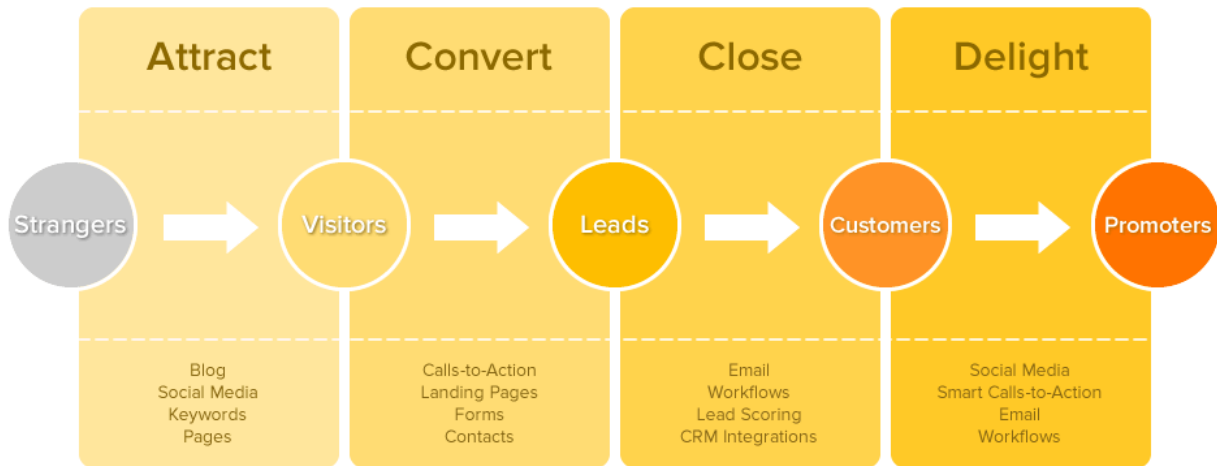
There is no one-size-fits-all pricing model for agencies, but there is one right way to feel about what you paid for marketing services: that you got what you paid for. You should always feel like the completed deliverables and services rendered were well worth the money.

4 A Holistic Approach to Marketing.

When we say “holistic,” we mean that your agency understands there’s more to marketing than top-funnel awareness building through display ads, blogging and social media publishing.

A modern day agency practices inbound marketing: a methodology that involves delivering content to prospective customers when and where they want to be reached. This means content has to contain context; it must be targeted based on behavioral data as well as the prospect’s current stage in the buying cycle.

On the next page is the process your prospects go through before becoming happy customers. Your agency should be prepared to help you deliver contextual content through a myriad of channels so you can attract strangers, turn them into website visitors, convert those visitors into leads, close those leads as customers, and continue to delight them beyond the purchase.



The Inbound Marketing Methodology.

5 Efficiency and Efficacy.

You want to know the money you fork over to your agency every month is going more toward actual work than project management or learning new software systems.

“ The technology an agency uses to not only manage projects but execute on them is important to me. I’m turned off by agencies that use Excel sheets and dated project management or communication tools. ”

- Erin Wasson, VP of Marketing, UrbanBound

Today, agencies should have a software toolset that makes it easier to do marketing, not harder.

6 Communication.

“Communication is sometimes more important than actually doing the job itself,” says Chad Reinholz of HindSite Software:

“ We’re releasing a new software module to businesses that plow snow. One guy I talked to said that customers won’t get too angry if you haven’t plowed their parking lot, but they will get upset if they call you up and ask when it will be plowed and you don’t have an answer.

In some respects, an agency’s work is similar. If you don’t know the status of a project, that kills a relationship more than poor work. I gauge an agency’s communication skills in the proposal stage by whether they present both a project plan and meeting rhythm.

”



7 Education and Training.

In order for a client to truly make use of the 40-page inbound marketing gameplan your agency put together, you have to be ready to (help them) implement it all. This means you have to have blogging know-how if your agency isn't doing it for you; you have to know how to manage a Facebook community if it's not part of the scope.

Education and training goes beyond knowing why your agency chose one strategy over another. The more adept every one of your employees is with the latest trends and tools in the marketing industry, the more successful you'll be in the long term. Your success leads to agency success.

Look for agencies that view education and training as an opportunity to demonstrate their expertise while simultaneously earning your trust and fostering a more collaborative relationship with you.

“ If I know more about available technology out there than a prospective agency, I likely wouldn't hire them. I would want them to teach me new things and keep me on top of trends -- not the other way around.

”

- Erin Wasson, VP of Marketing, UrbanBound

8 Accountability and Measurement.

In 2011, Fournaise Marketing Group in London surveyed 600 CEOs and decision makers to find that:

- 72% of CEOs think marketers “are always asking for more money, but can rarely explain how much incremental business this money will generate.”
- 70% think marketers “bombard their stakeholders with marketing data that hardly relate to or mean anything for the company’s P&L.”
- 67% think that, “unlike CFOs and Sales Forces, [marketers] don’t think enough like business people: they focus too much on the creative, ‘arty’ and ‘fluffy’ side of marketing and not enough on its business science, and rely too much on their ad agencies to come up with the next big idea.”

Is this how your boss feels? If so, your next agency has to be laser-focused on driving business results if they not only want to get hired, but want to stick around for awhile. Take it from Chad Reinholz:

“ One of the first questions out of an agency’s mouth in the proposal stage should be: ‘What are your goals?’ If they don’t ask that question, I have a hard time believing they’re going to be good at measuring results. How do you measure success if you don’t know what the goal is? ”

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THE AGENCY REPORT CARD

Does the agency you work with -- or want to work with -- meet the 8 criteria we discussed previously? Read the following statements to determine if your agency would pass or fail at meeting today's standards for partnership.

TRUST AND CREDIBILITY

- The agency practices what they preach: If they sell inbound marketing services, they do inbound marketing for themselves. **PASS** **FAIL**
- The agency directly addressed our business' specific goals in the sales process. **PASS** **FAIL**
- The agency has case studies that prove they can achieve desired results. **PASS** **FAIL**
- The agency has strong references and customer stories, and allows our team to speak with past customers about their experiences. **PASS** **FAIL**
- The agency is upfront about what services are kept in-house and what's outsourced. **PASS** **FAIL**
- The agency keeps up to date with the latest marketing industry news and keeps our team abreast of its impact. **PASS** **FAIL**
- The agency is truly invested in our success, and not just looking for a monthly paycheck. **PASS** **FAIL**

COMPATIBILITY

- The agency personnel I work with are easy to get along with. **PASS** **FAIL**
- The agency has a culture that complements ours. **PASS** **FAIL**
- The agency has marketing capabilities that complement ours. **PASS** **FAIL**
- The agency has achieved results with clients in the same or similar industry as our company. **PASS** **FAIL**

PRICING & VALUE

- The agency prices marketing services within our budget. **PASS** **FAIL**
- The agency's pricing accurately reflects the value we receive. **PASS** **FAIL**
- The agency offers flexible pricing models: They have pricing for project- and retainer-based services. **PASS** **FAIL**
- The agency doesn't pad billable hours when they're inefficient. **PASS** **FAIL**

HOLISTIC APPROACH TO MARKETING

(Offers Services to Address All Stages of the Marketing Funnel)

- The agency offers the four core services of inbound marketing: Traffic generation, lead generation, lead nurturing and customer acquisition, and analytics. **PASS** **FAIL**
- The agency understands both our industry and marketing pain points. **PASS** **FAIL**
- The agency has great writers on staff to aid content creation. **PASS** **FAIL**
- The agency uses data to inform the ongoing evolution of our marketing strategy. **PASS** **FAIL**
- The agency can point to a project they have completed that required them to work across teams, silos, and conflicting objectives. **PASS** **FAIL**
- The agency has staff on hand who can create digital experiences, such as graphic designers and front-end developers. **PASS** **FAIL**

THE AGENCY REPORT CARD

Does the agency you work with -- or want to work with -- meet the 8 criteria we discussed previously? Read the following statements to determine if your agency would pass or fail at meeting today's standards for partnership.

EFFICIENCY AND EFFICACY

- The turnaround time for services and deliverables is reasonable. **PASS** **FAIL**
- The agency has a systematic delivery process for completed services, and uses up-to-date project management tools to create efficiencies in production. **PASS** **FAIL**
- The agency is nimble and action-oriented, and can act fast to leverage real-time marketing opportunities. **PASS** **FAIL**
- The agency is results-driven; they demonstrate they can constantly test, change, and innovate. **PASS** **FAIL**
- The agency has a solid network to outsource work they can't complete in house, as well as a solid process for managing its completion. **PASS** **FAIL**

COMMUNICATION

- The agency always sets clear expectations and ensures all involved are on the same page at the start of a project. **PASS** **FAIL**
- The agency has a clear process for updating our team on the progress and timeline of a campaign. **PASS** **FAIL**
- At any given time, the agency can deliver numbers around our progress toward our established goals. **PASS** **FAIL**
- Agency personnel are responsive when we have questions or concerns. **PASS** **FAIL**

EDUCATION

- The agency invests in training our team on software, methodologies, and digital tools to help us help them accomplish desired results. **PASS** **FAIL**
- The agency understands that education and training allows us to have a more collaborative and successful relationship that's built on trust. **PASS** **FAIL**

ACCOUNTABILITY AND MEASUREMENT

- The agency sets challenging but reasonable goals. **PASS** **FAIL**
- The agency is focused on measurement, but they don't bombard us with meaningless metrics. **PASS** **FAIL**
- The agency keeps campaigns oriented around driving bottom-line results. **PASS** **FAIL**