**Agency Readiness Self Assessment**

Lots of blanks or missing answers will be indicative of more work to do before proceeding with following steps in the agency buyer’s guide. The more you put in now, the more you’ll get out later.

1. **What are the top goals you wish to achieve?**  
   *Example: Realize a 15% increase in annual sales by end of year.*

*Quick Tip*: Effective goals in this context frequently detail specifics with regard to a shift (from “x” to “y”), along with the timing to what you hope to achieve.

1. **What is the top priority or demands the greatest sense of urgency?**
2. **What are applicable marketing roles and related functions you already have in place?**  
   *Example: Marketing Manager: blogging, email newsletter, social media.  
    Brand manager: offline and online strategy  
    Internal Creative Team: art director, 2 designers, 1 video producer   
    Partner agencies: direct mail, public relations, live events*
3. **What are the needed marketing roles and/or functions not in place?**  
   *Example: More digital strategy: planning, tech, data, insights*
4. **What marketing technology stack and tools/assets are in place?**  
   *Example: Magento eCommerce, HubSpot blog and email, Google Analytics, Salesforce CRM, Sprinklr, BrightEdge, Livestream, New Relic, Domo*
5. **What potentially needed marketing tech tools/assets are not in place?**  
   *Example: Better technology to manage ads on Amazon and Pinterest, a video platform that embeds our forms, a content management hub for teams*
6. **What research, insights and assets can be shared to provide relevant background and/or potential direction?**  
   *Example: industry research, competitive analysis, KPIs, personas, brand guides, performance metrics, marketing/sales plan, insights from first or third-party data.*
7. **What are the leading qualitative and quantitative metrics for tracking or determining success?***Example: positive feedback, more inspiring customer reviews, higher energy levels in sales, visits, clicks, downloads, subscribers, views, leads, sales*
8. **What might delay, or stand in the way of you hiring an agency - and more importantly, is there consensus on what to do about anticipated obstacles?**Quick Tip: this should be a point of discussion with your team or stakeholders that can strengthen momentum and decisiveness if/when needed
9. **Who is the point person and/or project manager to lead your process -- and what is the range of time (weeks or months) your ready to commit?**  
   Quick Tip: Although timing can vary significantly based on scope of work, what’s currently in place, and a range of other variables -- you should typically plan no less than 60 days from the time you identify agency candidates to the time you agree on a statement of work with the final agency selected.