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THE ESSENTIAL **MARKETING AGENCY,** **CONSULTANT & FREELANCER** INTERVIEW TIP GUIDE

BECAUSE THE ONLY **GHOST** YOUR SMALL BUSINESS
WANTS A RELATIONSHIP WITH IS SNAPCHAT.



THE ESSENTIAL **MARKETING AGENCY** INTERVIEW TIP GUIDE

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SELECTING AN AGENCY OR A FREELANCER

Is your project most appropriate for an agency or a freelance contractor to take on? The answers to these five questions below will help point you in the right direction.

1 WILL YOU NEED ONGOING SUPPORT?

Is your project a one-and-done like a brochure or a postcard? Or is your project a website with a need for either ongoing maintenance or training? If you are contracting something small and transactional that won't need support a freelancer may be the way to go. For projects that are large in scope that you will want support on in the future - look to an agency that is going to be around for the long-haul.

2 HOW COMPLEX IS YOUR PROJECT?

Some projects involve multiple steps - for example if you are creating a campaign that has print collateral, a social media campaign, custom landing pages for tracking by media channel that you want to feed into a CRM for advanced ROI tracking...you should consider an agency that has experience with more complex projects. Agencies have resources that excel in each stage of your project to make sure you have expert eyes on each every detail by resources who have the most expertise.

3 HOW FAST DOES YOUR PROJECT NEED TO BE COMPLETED?

If you have a tight time line and you need the highest level of professionalism - consider an agency. The nature of freelance work is that you are dependent upon a single person to complete your project - and let's face it - we are all human and sometimes life gets in the way. If you have wiggle room on your deadline freelance is a viable option, but for an airtight commitment - look to an agency.

4 DO YOU HAVE MORE THAN ONE PROJECT?

If you are contracting several projects or launching a new brand or business, you should contract as many of your projects as you can under a single statement of work. You have more negotiation power for larger placements, whether you are working with a freelancer or an agency this will work to your advantage. Freelancers often have a more limited set of capabilities and may only be capable of executing a subset of your project needs.

5 THE GHOST FACTOR...CAN YOU AFFORD IT?

Sorry, but we all know it exists. If you absolutely can't afford to be "ghosted" (a term used to describe when you freelancer vanishes seemingly into thin air without completing your work) - then go with an agency, more on avoiding the ghost factor later.

SELECTING AN AGENCY OR A FREELANCER

Use the questions below to make sure the freelancer or agency you are hiring is a good fit for your business needs.

AGENCY OR FREELANCER PARTNER INTERVIEW GUIDE

- Find out what type of work they are an expert at (web design, graphic design, writing, etc.), only work with them on their area of expertise.
- Ask for work samples, review them with the freelancer and find out exactly what parts of the project they were responsible for, and how long the project took them to execute. Ask what kind of inputs the client provided to get a sense of how much guidance they need.
- Find out how much notice for a project request and how long they need to turn around a first draft. Make sure this aligns with your project deadline.
- Ask for a client reference.
- Establish what the communication cadence will be like on your project and the preferred method. Weekly sprint check-ins are common. Sometimes your partner may offer texting if that fits better into your schedule
- Ask if your partner will teach you how to either make updates to your project or do some tasks on your own so that you can become self sufficient in areas that you want to.
- Ask about their client retention rate - if they keep clients that's a good sign. If they have been in business a long time and have a high turn-over rate you may want to consider a different partner.
- How do they make you feel? Sounds touchy feely but they need to make you feel important and valued.
- Discuss who owns the rights to final product and source files - you should retain ownership rights to all work. Discuss how and when the final files will be sent to you.
- Determine how many rounds of revisions you will get under the statement of work and if revisions are included in the initial statement of work or if they cost extra. If they are extra ask about the hourly rate.
- Establish payment terms, it is common to pay an initiation fee that is 25-50% of the total project quote, see more on this in the ghosting chapter.
- Ask about an example of a time when a client project didn't go as planned, what happened.
- Find out what partnership means to them. Are they trying to just get your project done and move on or are they looking for a long-term relationship with your business.
- Sign a contract - regardless of if you are working with a freelancer or an agency it is to your advantage to sign something formal to protect yourself. If your partner doesn't have a contract then provide your own.

DON'T GET GHOSTED

Now that you've decided if you are going to work with an agency or a freelancer let's talk about how to avoid getting ghosted.

ANTI-GHOSTING CHECKLIST

- ☐ Don't pay 100% up front, if you have to pay an initiation fee then try to negotiate 25% up front and 75% upon project completion.
- ☐ Working with agencies reduces the risk of ghosting since they have business licenses and formal ways for you to issue a complaint, but it *can* still happen, sign a contract with whoever your partner is outlining the terms of work completion to protect yourself.
- ☐ Work with people you trust. Spending time going through the interview process is important. It's worth the extra 30 minutes to protect your time and investment in the long-run.
- ☐ Consider using formalized products or proven-processes that others have gone through with positive results.
- ☐ Establish a formal communication cadence and a method of communication to set expectations about how often you want to talk and how you want to talk.
- ☐ Ask your partner to establish a time line for your project with key milestones to ensure you are staying on track to meet your deadline.
- ☐ If your partner is late for meetings, forgets them, is unprepared for them, has excuses about why work isn't done, is constantly sick, and has frequently family emergencies, or blows your meetings off (especially before you have signed a statement of work)....run. Don't look back. Seriously. Your project is important, and your business should be valued at the highest level.
- ☐ Google your partner and check social media to read reviews and feedback from previous clients.

GRAPHIC DESIGNER TIPS

If you decide to use a freelance graphic artist, use this checklist to make sure you and your graphic designer are on the same page:

FREELANCE GRAPHIC DESIGNER CHECKLIST

- ☐ Find out what the designer's core competencies are, ask for work samples.
- ☐ When reviewing work samples ask what parts the designer did and what parts of the project other team members were responsible for to set expectations.
- ☐ Determine how many rounds of changes or review you get within your statement of work. If you exceed your agreed upon rounds of edits, how expensive are additional changes?
- ☐ Upon completion of the project will you receive the source files? Make sure this is established up front in case you ever want to make your own edits, or if you want to hire a new vendor.
- ☐ Make sure you provide a brand book up front to your designer, and work examples so they understand your look and feel.
- ☐ Ask for references, preferably clients that the designer has been working with for a long time.
- ☐ Ask about a time when a relationship didn't work with a client - what happened? You are looking to hear that they transitioned the client to a new vendor and didn't leave them hanging.
- ☐ Establish clear time lines, milestones, and a communication cadence.
- ☐ Ask what software they will build your project in to make sure it's something legitimate, and so you know what format the source files will be in. Programs in the Adobe Creative Suite is the industry standard for graphic design. If they say PageMaker, or heaven forbid PowerPoint...RUN.

SOCIAL MEDIA TIPS

Contracting out social media is becoming a popular practice in both small and large businesses, here are a few questions to ask before you get started:

SOCIAL MEDIA AGENCY OR FREELANCER CHECKLIST

- ☐ Reporting! How will the resource provide you with progress reports and at what cadence? Social media moves fast and it's important that you have a pulse on success.
- ☐ What metrics do they use to measure success? If they lead with number of followers be wary. Social media is more about 'engagement' than about sheer number of followers. Some consultants guarantee or promise a number of followers. Do not buy followers. Let me repeat....do NOT buy followers. This will hurt you in the long-term and ruins your social credibility. And if you do it, people can tell. How? Because you will have poor engagement. Social media is about building a community - so you need to build trust and authenticity.
- ☐ How will approvals of content posting happen? You want to make sure you have a good handle on this.
- ☐ Images or videos should be included in every single post, discuss this with your partner - how will this content be created?
- ☐ Who will handle real-time responses? Social media demands immediate response, over 24 hours is not an acceptable response time. For some channels, like Twitter even 2 hours is unacceptable.
- ☐ What platforms do they have expertise in? Does this align with the platforms you want to use?
- ☐ Ask for case studies and client references.
- ☐ What are their thoughts on "organic" social media? Influencer marketing can give you "organic" reach but as a business if they aren't suggesting paid social ads as a vehicle to generate awareness - move on.

WEBSITE DESIGN TIPS

Websites have become easier for businesses to create themselves, although selecting a Content Management System (CSM) has become more difficult. Make sure you get the features you need, for now, and the future. Ask these questions before you get started:

WEB DESIGN AGENCY OR FREELANCER CHECKLIST

- ☐ Discuss what you functionally need your website to do. Some functions for consideration: host video, host online education, eCommerce through a web store, calculate tax and shipping for eCommerce, information delivery, PDF hosting, form submissions, members only area, blog, etc.
- ☐ Every site needs to be optimized for mobile. In fact you should start with a mobile design and back into a desktop design - mobile is where everyone is looking at your site - especially if you are paying to feed traffic into it from social media.
- ☐ What CMS will be used to host your content? Is it something you can update yourself in the future? Make sure you understand maintenance, hosting, and any subscription/ plug-in on-going costs before you get started.
- ☐ Is training included? Most businesses want the ability to make updates to their website on their own. To be self-sufficient you will want to make sure training is included.
- ☐ What about bigger updates? Discuss the process for requesting feature additions or platform upgrades in the future. Websites are not "set it and forget it", they should be the center of your marketing universe and need constant attention.
- ☐ What analytics will be installed? You need to be able to measure traffic to your site, referral sources, time on site, conversion events etc. Most websites use Google Analytics. If you are having an enterprise solution built you may have access to a more custom solution.
- ☐ What features will you want in the future? Make sure this is outlined on the front end so you build your site on the optimal platform.
- ☐ References and work samples...duh. Always references and work samples.

SEO EXPERT TIPS

Search Engine Optimization, lots of people say they are good at it, most are not. If SEO is thrown into a menu of services a mile long ask some probing questions. SEO is a highly-specialized skill, and it requires on-going work to do it right.

SEO EXPERT INTERVIEW CHECKLIST

- ☐ Find out what search engines they are experts at optimizing for. Google is the industry standard but some agencies have competencies in Bing as well. Bonus points if they consider YouTube a search engine and include that in your strategy. What, you didn't know YouTube was considered a search engine?
- ☐ Discuss SEO and SEM (Search Engine Optimization and Search Engine Marketing). The two have become more closely related over time and a good SEO strategy includes consideration of SEM and off-site activity such as social media and backlink strategies.
- ☐ Reporting...again. With SEO it's easy to say "we're doing great!" but you need to establish success metrics. You'll need Google Analytics or some other analytic tracking installed on your website before you embark upon a SEO strategy
- ☐ so you can track organic traffic sources. When establishing metrics consider setting specific metrics for organic traffic such as time on site, bounce rate, and conversion if you have conversion tracking activities set up.
- ☐ Discuss ongoing monitoring - at what cadence will SEO improvements be made? What tool will they use to monitor and make changes? Look for a partner who uses multiple tools, popular tools include SEM Rush, Google Web Master Tools, BuzzStream, and Moz.
- ☐ Start with a competitive review and market analysis to make sure you are optimizing for the right words. Your SEO partner should conduct this and should provide information about search volume of the keywords that you decide to optimize to ensure you are spending your time optimizing the right keywords.
- ☐ Discuss a keyword strategy, this should include recommendations for on-site and off-site efforts.
- ☐ References...again...duh. Don't just take their word for it that they are SEO wizards. Ask for case studies and references.

VIDEOGRAPHER TIPS

Some agencies provide video services, but many subcontract this function to video experts. Whether you are hiring an agency or a freelancer, ask these questions to keep yourself covered:

VIDEOGRAPHER AGENCY OR FREELANCER CHECKLIST

- ☐ Establish what you need for your shoot and ensure the videographer has the resources. Services you should consider are: audio capture, visual capture, post-production editing, motion graphics creation, and video hosting.
- ☐ People excuse bad visuals much easier than bad audio - ask detailed questions about their audio setup. There are nuances to capturing quality audio in different settings, and your videographer should understand those.
- ☐ How many camera angles will they capture? 2 angles encourage interest in your video and can make up for videos where b-roll is scarce or unavailable.
- ☐ Find out how many rounds of edits are included in your statement of work. If you go over, how expensive are additional changes.
- ☐ Establish how you will receive delivery of files - most video will require that you are sent an external hard drive of the files. Determine if you will have access to the source files or just the final deliverable.
- ☐ Discuss quality - even social channels can support 4k quality. Make sure the visuals are up to your standards.
- ☐ Ask for work samples...always.
- ☐ Establish firm time lines and milestone dates.
- ☐ Discuss model releases - who will be responsible for collecting these? Your videographer should have a standard release.
- ☐ Talk about the shoot day - how many people will be there, who will direct the shoot? They should be able to guide the shoot and direct for you.

STRATEGIC MARKETING TIPS

You may be hiring an individual consultant or an agency to support with your strategic marketing needs, use this checklist to ask the important questions.

STRATEGIC AGENCY OR CONSULTANT CHECKLIST

- ☐ Just like with everything else...ask for work samples and references. If you are contracting an agency or a consultant for a marketing plan, ask to see what that might look like. You want to make sure the plan encompasses what you need done.
- ☐ Ask about their experience in your industry. To be an expert in market strategy they need to know your market well.
- ☐ Spell out very clearly who will execute what work. In some cases your statement of work may be limited to a plan, in others you may be contracting the agent to complete some or all of the proposed executables for you. If they are just creating the plan but you may want to use them to complete the action items from the plan, ask them to quote that too so you know what your long-term investment looks like.
- ☐ If the consultant is an individual, do they have a day job in addition to their consulting gig? Many consultants do this type of strategy work as a side-hustle. There's nothing wrong with it, just know that they might not be available for calls whenever you want them.
- ☐ Ask for case studies of strategic plans they've created and the outcomes of those strategic suggestions.
- ☐ Outline the scope of the strategy you are looking for - there is a line between strategy and tactics, however they are closely intertwined. Make sure it is clear on the front end what kind of recommendations you are looking for, so you get both the strategic and tactical plans if that's what you are looking for.
- ☐ Be wary of plans that don't have foundational elements like CRM, data tracking, a foundational branding platform, etc. Make sure plans align with your value proposition and ultimately - your long-term goals. Go with your gut.

GET ALIGNED

There are lots of agencies out there, even more consultants, and freelancers are at your fingertips - the most important thing...that your partner is in fact a partner, and that they understand (and care about) you, and your business.

ARE YOU WELL ALIGNED WITH A PARTNER? 5 WAYS TO TELL

1 THEY KNOW YOUR INDUSTRY

Industry knowledge and experience is not essential with all projects, however, if you are relying on a partner for strategic knowledge you should place more weight upon their industry expertise.

2 THEY UNDERSTAND AND CAN TRACK YOUR GOALS

Has your partner heard your goals? Were they able to assign success metrics to track performance and create transparency?

3 THEY'VE DONE IT BEFORE

Has your partner successfully completed projects like yours before? You don't want to be their experiment (unless they are up front about that and are giving you some reason to want to be the guinea pig, i.e. discounting).

4 THEY HAVE PROOF

Great, they said they've done things like your project before...can they prove it? Do they have strong client references, case studies and work samples?

5 THEY MAKE YOU FEEL COMFORTABLE

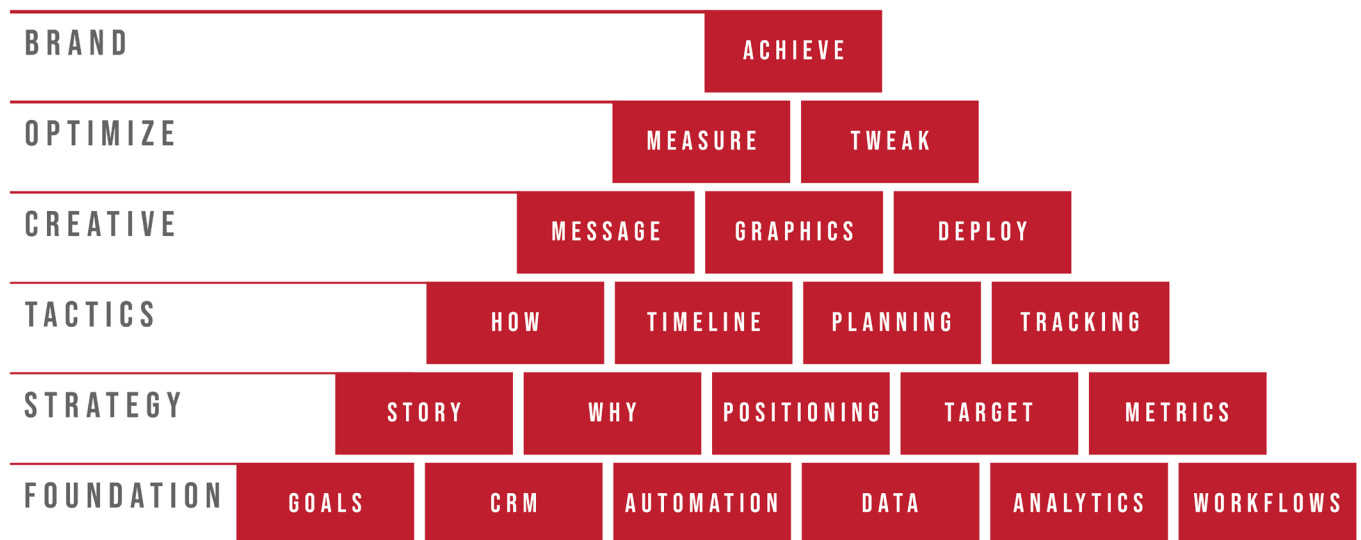
Ultimately you are looking for a long-term partner, you need to feel comfortable with the people you are working with. If they make you uncomfortable - trust your gut.



BUILDING A SOLID FOUNDATION FOR YOUR BRAND

BUSINESS, MEET RED BRICK PARTNERS

Whether you are working with Red Brick Partners for your project, retainer, or small business program needs, Red Brick builds your brand from the bottom up. The Red Brick Brand Builder Process is developed to provide brands with infrastructure needed to support long-term success, and to provide insights from data to support with metric-driven decision making.



LOOKING FOR A RE-BRAND OR ARE YOU A SMALL BUSINESS? NO PROBLEM.
ASK ABOUT RED BRICK SMALL BIZ

**READY TO START BUILDING?
CONTACT RED BRICK PARTNERS**

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