✅ Marketing Agency Vetting Checklist

Avoid costly mistakes and choose the right partner for your business.

🔍 Before You Reach Out

- We've defined our marketing goals and KPIs.
- We understand whether we need strategy, execution, or both.
- We have a clear timeline and budget.
- We've outlined internal resources (team, tools, content support).

🗣️ Initial Agency Conversation

- They asked detailed questions about our goals and audience.
- They've worked with similar businesses or industries.
- They explained how they measure results and success.
- Their communication style feels like a good cultural fit.
- We met the actual team—not just the sales rep.

📈 Evaluating Their Proposal

- Deliverables are clearly defined (what, when, how).
- The pricing structure is transparent—no hidden fees.
- KPIs and reporting cadence are included.

- They showed real case studies or client results.
- The contract includes fair terms, with an exit clause.

🚩 Red Flags to Watch Out For

- They promise instant results or “guaranteed rankings.”
- The proposal is full of jargon but light on substance.
- No clear ownership of content, data, or creative.
- Poor online reviews, or they avoid giving references.
- Long-term contracts with unclear scope or lock-ins.

✅ Final Decision Confidence Check

- We trust their expertise—and their process.
- We feel confident in communication and collaboration.
- We’re aligned on success metrics and expectations.
- We’ve compared at least 2–3 agencies.
- We’re excited, not pressured, to move forward.

Pro Tip: Print this checklist and use it during your vetting process. The right agency won’t just tolerate your questions—they’ll welcome them.