

Marketing Agency: Audit Checklist

When deciding on a marketing agency, it's important to consider how their process and value will align with your business. While it may feel daunting trying to determine whether an agency will make a good fit, there are a few questions you can ask to get a better idea of how their offerings can support your business growth. The checklist below contains a listing of questions you can ask to help assess the perfect marketing agency for your needs.

General

- Do you have any clients that would be a conflict of interest for my business?
- Do you work only with clients, specifically in my business?
- What do you feel separates you from other agencies?
- What are your core capabilities, and what do you outsource?
- What if I need a marketing service that you do not provide in-house?
- How do you handle client confidentiality?
- Do you have case studies that you can share?

Staffing and Availability

- How many people will be assigned to my account?
- Will there be a dedicated point person on my account?
- How many full-time employees do you have? Please provide an organizational chart.
- Do you have the bandwidth to take on my business?
- Do you have content writers on staff?
- What are the standard hours of operation?
- What happens if there is an emergency during off hours and/or weekend work is required?

Technology and Security

- What technologies or software do you use for project management, meetings, conference calls, and file-sharing?
- Which design programs do you use?
- How long do you back up files once a project is completed?

Pricing

- How do you structure your fees?
 - Hourly
 - Block rate (a certain amount of dedicated hours per month)
 - Retainer
- Do you offer flexible payment terms, payment plans, and/or accept credit cards?
- What are your retainer agreement terms - monthly, quarterly, or annually?
- How many days' notice do you need if a project needs to be canceled?

Process

- What kind of reporting/measurement do you provide?
- How often do you meet internally on our account?
- How often do you recommend team calls/meetings?
- Can you explain your process?
- How many rounds of revisions are included in your process?
- How are upcharges estimated and communicated?
- How do you handle ownership of the end product that is produced?
- How long do you back up files once a project is completed?