

# Agency Performance Evaluation

Did you know that the average agency-client tenure is less than 3 years? Marketing agencies offer resources, extra bandwidth, and specialized expertise to brands of all sizes. That said, the agency-client relationship can be a tricky one to get right... and an expensive one to get wrong.

## HOW TO USE

This scorecard is broken up into categories, each with statements describe an ideal agency partner. After reading each statement, score your agency on a scale of 0-2. If you are using the PDF version, the scorecard totals will auto-update as you go through the document.

## SCORING

0 = Does not describe agency, 1 = Kind of describes agency, 2 = Describes agency well

FINAL SCORES	
Category	Score
Creativity	
Innovation	
ROI	
Collaboration	
Strategy	

# Existing Agency Partner Scorecard

Each of the following statements describe an ideal agency partner. After reading each statement, score your agency on a scale of 0-2.

## SCORING

0 = Does not describe agency, 1 = Kind of describes agency, 2 = Describes agency well

## CREATIVE

### OVERALL

**On-Brand** - Ideas and executions are on-brand, align to marketing campaign(s), and product/service priorities

**Creative Collaboration** - Demonstrates a willingness to bring our team into the creative process before final product is created to maximize satisfaction

**Resourceful** - Leverages client's internal resources to ensure product/service features and benefits are communicated correctly

**Aligned** - Ideas & executions are aligned with connections plan (AKA engagement/media plan)

### VISUAL CREATIVE

**On-Brand** - Accurately represents brand, campaign(s), and product/services

**Differentiated** - Stands out from competitors

**Customer-Focused** - Delivers on customer needs/interests rather than personal preferences

### COPYWRITING

**On-Brand** - Accurately represents brand, campaign(s), and products/services

**Engaging** - Brings products/services to life in a way that drives an emotional connection with consumers and/or tells an engaging story

**Polished** - Always grammatically correct without spelling errors/typos

**CREATIVE SCORE: /20**

Notes:

## INNOVATION

### IS OUR AGENCY COMMITTED TO BRINGING FRESH IDEAS?

<b>Balanced Approach</b> - Balance previous success with potential innovation	
<b>On-Trend</b> - Monitors latest trends & delivers innovative ideas	
<b>Freshness</b> - Never allows relationship to get stale	
<b>Prioritization</b> - Prioritizes our business over building their portfolio	
<b>Growth Potential</b> - Ability to add additional capabilities as we grow	
<b>Data-Driven</b> - Ideas are presented alongside data that tells us why we should invest	
<b>INNOVATION SCORE: /12</b>	

Notes:

## RETURN ON INVESTMENT (ROI)

### DOES OUR AGENCY DRIVE RESULTS?

<b>Consistency</b> - Ensures consistent output/quality across all deliverables	
<b>Scope</b> - Manages agreed upon scope	
<b>Timely</b> - Turnaround for deliverables is reasonable and per expectations	
<b>Reporting</b> - Provides timely, accurate, and insightful reporting that tracks the right metrics and is presented in a clear and concise manner	
<b>Data-Oriented</b> - Leverages data to identify patterns and optimize performance	
<b>Value</b> - Pricing reflects value received	
<b>QA</b> - Ensures all deliverables have went through a quality assurance process	
<b>ROI SCORE: /14</b>	

Notes:

## COLLABORATION

### IS THIS AGENCY A TRUE PARTNER TO OUR COMPANY?

<b>Brand Advocacy</b> - Account management acts as a champion of our internal team	
<b>Dynamics</b> - Understands nuance of internal team dynamics	
<b>Team-Oriented</b> - Commits to training our team on software, methodologies, and/or tools	
<b>External Collaboration</b> - Effectively collaborates with other agency partners/vendors	
<b>Continuity</b> - Agency turnover does not impact relationship/deliverables	
<b>Transparency</b> - Agency is transparent about capabilities and limitations	
<b>COMMUNICATION</b>	
<b>Clarity</b> - Communicates with transparency and sets clear expectations for all stakeholders	
<b>Feedback</b> - Account management accurately represents our needs to the agency	
<b>Responsiveness</b> - Responds to requests/questions within a reasonable timeframe	
<b>PROCESS</b>	
<b>Clarity</b> - Has a clear process for updating our team on the progress/timeline of a project	
<b>Planning</b> - Meetings are have an agenda, are productive, and have clear next steps/timelines	
<b>Project Management</b> - Proactively manages our team and agency team to ensure timely delivery of assets and feedback	
<b>Accountability</b> - Assumes responsibility if hour overages are caused by agency-side issues	
<b>COLLABORATION SCORE: /26</b>	

Notes:

## STRATEGY

### IS THEIR STRATEGY ALIGNED WITH OUR COMPANY?

<b>Goal Alignment</b> - Deliver on our business goals while adhering to marketing best practices	
<b>On Brand</b> - Ideas and executions are on-brand and align to our product/service priorities	
<b>Industry Expertise</b> - Leverages industry, competitor, & market knowledge to inform strategy	
<b>Data-Driven Decisions</b> - Leverages historical data to inform future decisions	
<b>Goal-Driven</b> - Sets challenging goals and constantly tests, measures, and iterates/innovates to meet KPIs	
<b>Agility</b> - Nimble, action-oriented, and acts fast to leverage real-time marketing opportunities	
<b>Budget Alignment</b> - Strategy/ideas align with communicated budget	
<b>STRATEGY SCORE: /14</b>	

Notes: