

HERE'S TO A COLLABORATIVE  
PARTNERSHIP TOGETHER.

BY THE WAY, OUR PAYMENT TERMS  
ARE NET 120 DAYS OF DEMORALIZING  
BUREAUCRACY.

OH, AND CAN YOU PICK UP THIS TAB?



***NOT an  
example of  
a profitable  
marketing  
agency  
partnership.***

# Pick a Profitable Marketing Partner



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Co-Founder & President  
The Marketing Help



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Digital Marketing Manager  
Ignite Spot





**THE  
MARKETING  
HELP**



**Erik Harbison**  
**Co-Founder | President**



20 years working in digital agencies.



5 years as CMO for \$100M+ software company.



Started / sold a boutique digital agency



Led special projects team focused on ad agency partnerships for eBay



Created Agency RFP processes for B2B Software provider

# After Today's Session...

- Determine when you need a marketing agency partner
- Options for finding the best agency fit
- Ways to filter agency candidates
- Managing a successful partnership

# Marketing Agency

## Pros

*Speed to market.*  
*Performance.*  
*Innovation.*

## Cons

*Service level.*  
*Account team support.*  
*Fee vs Value.*

# Which one are you?



I **have never**  
**hired** a  
marketing  
agency before.

A



I have a marketing  
agency partner...  
...and I **am happy**  
**with them.**

B



I have a marketing  
agency partner...  
...but **not happy with**  
**them.**

C

I am **currently**  
**looking** for the  
right marketing  
agency partner.

D



Any attendees  
currently work  
for a  
marketing  
agency?

Problems with finding a  
marketing agency  
partner...



# The Problem...

# Choice.

## Categories

- ☐ Information Technology (1706)
- ☐ B2B Services (1640)
- ☐ Professional Services (1046)
- ☐ Marketing Services (753)
- ☐ Implementation Services (752)
- ☐ HubSpot Consulting (716)
- ☐ Inbound Marketing (395)
- ☐ Outbound Marketing (388)
- ☐ Advertising Agencies (347)
- ☐ Digital Marketing (302)

[Show Less](#)

Results from a search on  
“marketing agency” in g2.com

Boutique?  
Full-service?  
Freelance?

# The Problem...

The average agency-client tenure is less than 3 years.

- [Bedford Group](#)

## ROE.

### *Return on 'Effort'.*

Fee vs value delivered.  
Knowledge sharing.  
Business cycles.  
Time for transition.

Strong Partnerships are  
built on Relationships.

Partners are not  
Vendors.

# Vendor vs Partner

*Transactional*



*Relational*



# Today's Content

<b>Why?</b>	Do I even need a marketing agency partner?
<b>Who?</b>	Resources for finding the best agency partner for ME.
<b>How?</b>	Filtering for the best agency partner candidates.
<b>What?</b>	Frameworks that will manage a successful partnership

# Why? What is our real need?

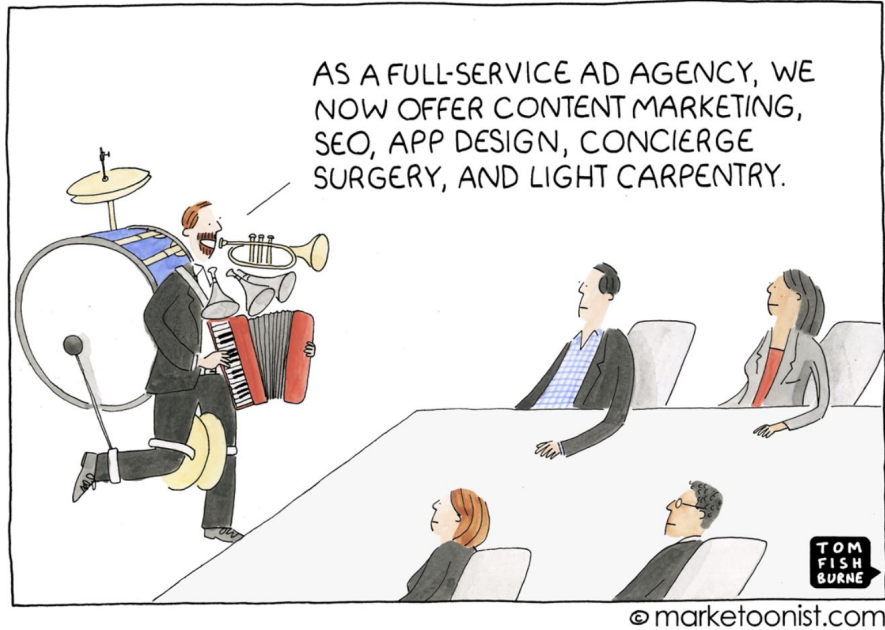
Can an agency fix our problem? **Yes.**

Can someone here do the work? **No.**

Can we outsource to a freelancer first? **No.**

Can we afford it (at least for a pilot program)? **Yes.**

# Why? What is our *REAL* need?



Does full-service = full-focus?

Do you want the **results** or the **reputation**?

Are you the first client using their new service?

Is a niche or boutique agency a better starting point?



# Why? First, define these...

Agency Committee. (who makes the decision?)

Agency type. (full service vs boutique?)

Scope of project. (6 month project? Open ended?)

Selection Scorecard. (what criteria matters to you?)

# Poll Question

# Who? How do I find my partner?

**Consultant (DIFY)**

**Review sites (DIY)**

**Your network (DIWY)**

# Who? Consultants (DoltForYou)

Bedford Group  
Agency Loft  
Setup.us

## **Pros:**

Save time.

Access a strong network.

## **Cons:**

Limited control.

Fees can be high.

Quantity > Quality

# Who? Review Sites (DoltYourself)

Clutch.co

G2.com

Upcity.com

DigitalAgencyNetwork.com

## **Pros:**

You are in control.

Social proof.

## **Cons:**

Time consuming.

Quality > Quantity

# Who? Your Network (DoltWithYou)

Linkedin Connections  
Your Contacts database  
My Linkedin Connections  
Niche Groups/Communities

## **Pros:**

Save time.  
Referrals.

## **Cons:**

Longer process.  
Quality > Quantity

# Question to Ask Your Agency:

Is there anyone in your network that would be a positive add to your skills and services?

# Poll Question



# How? **Filtering agency candidates.**

**Intro & Needs assessment call FIRST.**

**Request-For-Information (RFI)**

**Request-For-Proposal (RFP)**

**Evaluation Scorecard**

# How? For RFI/RFP's...

Client References.

Assessment questions / scenarios.

Designated Account team background.

Relevant experience examples.

# Question to Ask Your Agency:

Will the assigned account  
team be DESIGNATED or  
DEDICATED?

# Questions to Ask your Agency Reference:

Can you provide an example  
when the agency went above &  
beyond the contract terms?

# How? Scorecard for Selecting an Agency

**On scale of 1-4...(1 = poor, 4 = great)**

Specifics and recency of client references.

Ability to understand your business.

Depth of account team experience.

What % you would be of agency annual revenues.

# Poll Question

# What? Steps for a success...

**Clear expectations (no surprises)**

**Transparency (vulnerability)**

**Accountability (you <> agency)**

# What? Tools for a success...

**Contract / Agreement.**

**Agency Performance Scorecard.**

**Client Partner Survey.**



# What? Contract Terms...

**Expect a 2-year minimum.**

**Propose 6-month with mutually agreed upon renewal clause.**

**No auto-renew clauses.**

**30-day out clause (unless there is cause)**

**Fees - do not feel like “% of spend” is your only option.**

# What? Contract Terms...

## **Agency Fee Options:**

Retainer.

Commission (% of sales).

Cost-per-lead.

Hybrid.

What are the best ways to hold each other accountable?

Enable transparency?

Enable open and honest communication?



# Agency Performance Scorecards

**Mutually define the criteria.**  
**Weighted scoring.**  
**Monthly review.**

Allows an agency partner to know where they are performing well and where they need to improve.

Scoring Rubric	Performance		Account Management Support		Knowledge Transfer		Forward-Thinking		Challenge Us		Response Time		
<b>4 = Doing an awesome job.</b> <b>3 = Meeting expectations.</b> <b>2 = Could be doing better.</b> <b>1 = We need to talk.</b>	Your team is executing to a level that is, at a minimum, meeting the agreed upon goals for the campaigns you are managing. Understanding that some things are out of your control, you are still exhibiting, and communicating, your best efforts to meet and exceed our campaign performance goals.		Your team is delivering as promised. Overall service level from the agency shows a level of interest & understanding of our business, goals and challenges. The executive level from the agency is aware of our account and is contributing ideas to the account team.		You are making our marketing team smarter, and more strategic. You subject matter expertise is evident on a daily basis. You are proactively keeping us top-of-mind for potential beta testing opportunities with relevant marketing platforms.		You are consistently sharing with us your vision for what the next 6-12-18 months looks like for our campaigns, business and relevant trends. And, you are communicating recommendations on how to best proceed.		You listen and understand our business, which is evident by you pushing us outside of our comfort zone in terms of tests, processes, strategies and tactics. You are not taking orders, you are listening, making recommendations and taking action.		You are proactively communicating good/bad news. You are consistently successful with honoring your reply times. And if not, you are providing context around any challenges.		
Scoring Weights	30%		15%		15%		10%		15%		15%		100%
Month	Score	Weighted Score	Score	Weighted Score	Score	Weighted Score	Score	Weighted Score	Score	Weighted Score	Score	Weighted Score	Final Score:
January	1	0.3	1	0.15	1	0.15	1	0.1	1	0.15	1	0.15	0.7
February	2	0.6	2	0.3	2	0.3	2	0.2	2	0.3	2	0.3	1.4
March	4	1.2	4	0.6	4	0.6	4	0.4	4	0.6	4	0.6	2.8
April	4	1.2	4	0.6	4	0.6	4	0.4	4	0.6	4	0.6	2.8
May	4	1.2	4	0.6	4	0.6	4	0.4	4	0.6	4	0.6	2.8
June	4	1.2	4	0.6	4	0.6	4	0.4	4	0.6	4	0.6	2.8
July	4	1.2	4	0.6	4	0.6	4	0.4	4	0.6	4	0.6	2.8
August	3	0.9	3	0.45	3	0.45	3	0.3	3	0.45	3	0.45	2.1
September	4	1.2	4	0.6	4	0.6	4	0.4	4	0.6	4	0.6	2.8
October	4	1.2	4	0.6	4	0.6	4	0.4	4	0.6	4	0.6	2.8
November	4	1.2	4	0.6	4	0.6	4	0.4	4	0.6	4	0.6	2.8
December	3	0.9	3	0.45	3	0.45	3	0.3	3	0.45	3	0.45	2.1

# Client Performance Scorecard

Mutually define the criteria.  
Weighted scoring.  
Monthly review.

Allows a client partner to know  
where they are performing well and  
where they need to improve.

Scoring Rubric	Transparency		Autonomy		Communication		Total Company Support		Accountability		Feedback		
4 = Doing an awesome job. 3 = Meeting expectations. 2 = Could be doing better. 1 = We need to talk.	Your team is providing access and insights to prior performance, data, research, etc. that will help us most effectively execute against our process, and maximize our expertise. You treat us like an extension of your marketing team.		Your team is trusting us to execute against our expertise. You trust our process and are not micro-managing our efforts.		You are embracing a 'no surprises' mindset. Your team is proactively communicating and known issues, concerns, wins, etc. in a timely manner.		You are a great champion for us internally with other departments. You have educated other teams on the importance of their alignment with our campaigns, goals and potential cross-functional needs or support.		You follow through on your commitments for payment, scope, tasks needed and any items that are dependent for us both to succeed.		You are providing our agency team with consistent and honest feedback. This should include performance of our campaigns, team, tools and process. Your provide this open and honest feedback when it is expected (during weekly/monthly calls) and when it is needed (emailing or calling whenever you have feedback to share).		
Scoring Weights	30%		15%		15%		10%		15%		15%		100%
Month	Score	Weighted Score	Score	Weighted Score	Score	Weighted Score	Score	Weighted Score	Score	Weighted Score	Score	Weighted Score	Final Score:
January	1	0.3	1	0.15	1	0.15	1	0.1	1	0.15	1	0.15	0.7
February	2	0.6	2	0.3	2	0.3	2	0.2	2	0.3	2	0.3	1.4
March	4	1.2	4	0.6	4	0.6	4	0.4	4	0.6	4	0.6	2.8
April	4	1.2	4	0.6	4	0.6	4	0.4	4	0.6	4	0.6	2.8
May	4	1.2	4	0.6	4	0.6	4	0.4	4	0.6	4	0.6	2.8
June	4	1.2	4	0.6	4	0.6	4	0.4	4	0.6	4	0.6	2.8
July	4	1.2	4	0.6	4	0.6	4	0.4	4	0.6	4	0.6	2.8
August	3	0.9	3	0.45	3	0.45	3	0.3	3	0.45	3	0.45	2.1
September	4	1.2	4	0.6	4	0.6	4	0.4	4	0.6	4	0.6	2.8
October	4	1.2	4	0.6	4	0.6	4	0.4	4	0.6	4	0.6	2.8
November	4	1.2	4	0.6	4	0.6	4	0.4	4	0.6	4	0.6	2.8
December	3	0.9	3	0.45	3	0.45	3	0.3	3	0.45	3	0.45	2.1

# Poll Question

# Q&A

# Need Marketing Help?

Have questions about marketing agency partnerships?	<b><a href="mailto:erik@themarketinghelp.co">erik@themarketinghelp.co</a></b>
Want to learn more about us?	<b><a href="https://themarketinghelp.co">themarketinghelp.co</a></b>
Want more tips on managing agencies and marketing teams?	<b><a href="https://themarketinghelp.co/podcast">themarketinghelp.co/podcast</a></b>
Want more manager & executive level resources to help manage your marketing teams?	<b><a href="https://themarketinghelp.co/membership">themarketinghelp.co/membership</a></b>



# Resources

**Scorecard to Grade Your Marketing Agency**

 [View sheet](#)

**Scorecard for Agencies to Grade Clients**

 [View sheet](#)

**The Marketing Help Podcast**

 [Managing Your Agency](#)

**Calculating ROI**

<https://blog.ignitespot.com/how-to-calculate-roi-on-your-marketing-efforts>

<https://www.ignitespot.com/how-to-calculate-marketing-campaign-roi>

**Magnify Your Marketing Spend**

<https://www.ignitespot.com/free-business-webinars#magnify-your-marketing-spend>

**Accounting for Advertising Agencies**

<https://www.ignitespot.com/accounting-for-advertising-agencies>