

THE ONLY CHECKLIST

You Need to Find the Right PR and Marketing Agency

Finding and choosing a marketing and public relations agency to assist in achieving your organizational goals can be intimidating and overwhelming. Ideally, a successful relationship will last for years, growing and shifting with your business. That's a lot of pressure, and there are many different things to consider. Simplify the process by evaluating some foundational elements. These can act as guidelines to lead your search. Use the check boxes in each of the five key areas below to gauge how close you are to finding the perfect match.

1 Communication

You'll want to have a rapport with the ideal agency, where your relationship functions like an extension of your team. Familiarize yourself with the agency team and your main point of contact. Is there chemistry? Do you like and trust them? Does their communication style fit with your team's personality and organizational culture?

- ✓ **Easy to get along with**
- ✓ **Shows a commitment to relationship building**
- ✓ **Consistent and enthusiastic with communication**



2 Industry Expertise

Every sector is unique, with its own particular challenges. You'll want to make sure that the agency has background knowledge and established credibility in your specific sector. See if the agency knows the players in your market and can talk the industry lingo. In addition, see if the agency has case studies, references, or testimonials to share with you.



- ✓ **Has worked successfully in your industry**
- ✓ **Understands your target audience**
- ✓ **Is familiar with trends and issues in your industry**

3 Processes

Look for an agency that offers a detailed delivery process specific to your needs and business goals. They shouldn't be afraid to commit to results, so look for a plan that involves tracking metrics and provides ongoing reporting.

- ✓ **A methodical and perceptive approach**
- ✓ **A scalable and pliable plan**
- ✓ **Cutting edge techniques**
- ✓ **Allows for an appropriate level of input**



4 Commitment and Fit

There are certain, intangible elements about choosing an agency that just needs to feel right. Do you trust their leadership and advice? Do they have a sense of ownership and responsibility to your business goals? Are they seeing opportunities for you?



- ✓ **Shares core values**
- ✓ **Aligned with your business goals**
- ✓ **Behaves like they are part of your team**

5 Core Capabilities

Many agencies have strengths and weaknesses. Some focus on specific areas of marketing and public relations, and some offer a fully integrated in-house set of offerings. **Identify your needs** and see how they match up with the service specialties of the agency.



Public Relations

Advocacy Guest blogs
Media placement Press releases
Analyst briefings M&A support



Outreach

Content creation
Email marketing
Graphic design
Website development
Social media management
Search engine optimization (SEO)
Digital advertising
Virtual & live event planning
Case study development
Video production
Blogging



Strategy

Branding Intent Data
Analytics Goal-setting
Automation Customer insights
Research Account-based marketing



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