

TESTING THE WATERS

*The Essential Questions to Ask Before Hiring
a Marketing Agency*

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THINK
OUTSIDE
THE BOX

INTRODUCTION

Why should you consider hiring an outside marketing agency, and how do you choose the right one?

Finding the right marketing partner to help meet your business objectives is never an easy task. The process can take significant time, energy, and resources as your team members get to know various agencies and evaluate which will best meet your needs.

While some businesses may find it more advantageous to formulate an in-house marketing team, working with an external agency for marketing support certainly has its benefits. For example, when it comes to financial feasibility, outsourcing a project to a marketing agency often ends up costing less than hiring new full-time staff to execute in-house. Plus, having an agency on your team means immediate access to industry professionals with years of experience in a variety of backgrounds.

An agency can introduce your brand to new marketing technologies, making strategic recommendations on which tools are most beneficial to your business. Agencies are up-to-date on the latest trends and bring years of firsthand industry experience to apply to your

project. Moreover, they provide a fresh, outside perspective in approaching your project and business goals.

During your search for the best partner, it's important to go in prepared. Know what you want for your project and which type of agency you're looking for.

An all-star marketing partner will be a team of creative experts that are professional, responsive, and collaborative. The agency will have a strategic approach to projects with proven success and a strong portfolio. Most importantly, it will be honest about its capabilities and transparent about its progress on your project. After all, the most successful, long-term partnerships are built on mutual trust.

The key to making sure you gather the right information about the agencies you interview is knowing which questions to ask. Use the following suggestions to guide your conversations as you meet with agencies, and you'll find your perfect match in no time.





CAPABILITIES

What services do you offer and what are you best at?

CORE SERVICES

With agencies of all types and sizes, you're hunting for a match among a wide array of options. The key to finding an ideal marketing partner is figuring out which agency offers the right combination of proficiencies to best align with your business goals. Between development, design, strategy, and marketing, it's likely an agency will have strengths in some capabilities over others. Do your research to identify an agency's core offerings.

OUTSOURCING

It's always helpful to know which services the agency is capable of providing in-house and which need to be outsourced. While outsourcing services may bring expertise to enhance certain aspects of your project, adding more layers to the process could slow momentum and delay progress. Be sure to discuss the relationship between an agency and its contractors to be aware of how outsourcing could potentially affect your project or strain the timeline.

METHODOLOGY

How does the agency approach tackling a project? Every seasoned agency should follow a tailored methodology that has been developed and proven over time. From concept to execution, a well thought-out process demonstrates that an agency has tested different approaches to best determine what works and what doesn't – so your company can expect the most efficient, effective process possible. Although every agency's process can look drastically different, key characteristics of a solid methodology include an agency's eagerness to learn about your brand, clear expectations from the onset, a collaborative approach that includes feedback from your team, and a step for optimizing the work and adjusting for improvements.

QUESTIONS TO ASK

- What are your strengths and core services?
- What services are done in-house vs. outsourced?
- Do you have a specific methodology for how you approach projects?

A well thought-out process demonstrates that an agency has tested different approaches to best determine what works and what doesn't.

EXPERIENCE

What is your agency's background and how did it get its start?

QUESTIONS TO ASK

- How did your agency get started?
- What other projects have you done that are similar to ours?
- Have you worked with other clients within our industry?

HISTORY

When getting to know an agency, take some time to learn about its background. Knowing how the agency got its start and grew to its current state can shed some light on what to expect for the future. Don't be afraid to delve into the agency's history and ask what its entrance into the industry was like. What's its story? Learn about what drives the team to do what they do, and how the company's mission influences decisions going forward. Consider how a partnership would bring value to the agency as well as your business for a relationship that's mutually beneficial.

EXPERTISE

When seeking out an agency to support your brand, industry experience is key. A well-established marketing partner brings with it insight and advanced expertise gained from years of experience in the field. With refined skills, an agency is better equipped to help you accomplish your goals through expert planning, research, and design. Find out which types of projects an agency has experience with to better gauge how prepared it is for your project.

METHODOLOGY

The best way to gain insight on an agency's field experience is by asking for a portfolio. By showcasing case studies, an agency demonstrates pride in its execution of projects and reveals a willingness to let prospective clients in on the details of its process. When reviewing a portfolio, pay attention to the types of clients an agency has worked with. Account for the size of the businesses, their audience, purpose, and the kinds of services or products they provide. Would this agency be able to cater to your business in a similar way?



TEAM

Can you tell us more about who will be assigned to our project?

AN EXTENSION OF YOUR TEAM

Working with an outside marketing agency essentially adds a whole new team to your marketing department. While this increases your resources, it also creates an extra layer of communication between what your team expects for the project and those executing on the tasks. In order to ensure the most effective teamwork, carefully consider the members who will be handling your project.

ASSIGNED ROLES

A good marketing agency should be able to definitively communicate the roles of each team member on a project. Before you dive into a partnership, inquire about the team's structure to get a better understanding on which roles will have a hand in your project. Find out who will be responsible for carrying out the details, as well as who will ensure the work gets done and the project stays on track. Learn more about which people you'd be working with on a daily basis.

EXPERIENCE

Once you have a good understanding of what the team will look like, consider the level of expertise for the individual members assigned to your project. Get a good idea of how long they've been working with the company and the overall years of experience they have in the field. Ask the agency whether to expect junior or senior level talent for your project, or a combination of both.

QUESTIONS TO ASK

- What roles and team members might be assigned to our project?
- Will there be a main point of contact to drive/oversee the project?
- How long have your team members been in their respective fields, and what other projects have they been involved in?

To ensure the most effective teamwork, carefully consider the members who will be handling your project.

COLLABORATION

How much say do we get in project decisions?

QUESTIONS TO ASK

- How collaborative will the project be, and how involved can our team be in the process?
- What are your expectations for the level of industry knowledge your clients should start with?
- Who is your ideal client or partner (considering level of collaboration, experience, long term/short term)?

GETTING ON THE SAME PAGE

While an agency's expertise is certainly a top factor in determining who to work with, collaboration and communication are equally as important. If your team and the agency aren't on the same page about how to work together, producing successful results will be a challenge no matter the agency's talent.

INVOLVEMENT

In your evaluation, consider how collaborative you want the relationship to be. Does your team expect to be involved in the details or are you more comfortable sitting back and letting the agency take the reins? Whether you're looking for a more hands-on or hands-off approach, it's important to identify an agency's general level of collaboration by looking to its methodology. How many rounds of revisions does it include? What is its process for approving ideas and making changes? How does the client communicate feedback? For a smoother project, choose an agency that offers the type of relationship and collaboration you're looking for.

EXPECTATIONS

After determining the type of relationship you want, establish a strong foundation for your partnership by setting expectations at the forefront. Have a conversation and share with the agency your expectation for involvement, including how much skill and time you expect your team members to contribute and what you anticipate your interaction to look like. There should be a clear understanding on the level of guidance, training, and support each team is expected to contribute.

COMMUNICATION

How will you communicate during the project's execution?

TRUST

Creatives are notorious for getting caught up in ideas to the neglect of good organization and follow-through. Finding the right agency means identifying a partner you can trust – one you're confident will stay on top of things, be responsive, and responsibly deliver on your project.

CHANNELS

Learn about what kind of communication habits the agency practices and prefers. Ask about the company's method and medium for communicating possible ideas, revisions, and approvals. Inquire about which channels it uses most often and how frequently you might anticipate updates and approval requests. Identify who will be your main point of contact when you have questions. Ask the agency what its typical response time is for client requests. This knowledge will give you a better idea of the frequency and ease of communication between both parties.

It doesn't matter how stunning an agency's portfolio is. If you can't trust the team to get the job done and stay accountable to their word, they're not worth partnering with.

QUESTIONS TO ASK

- How will you communicate with us? (phone, email, in person etc?)
- What's your typical response time and availability?
- What platforms do you use for collaborating and communicating feedback? (DropBox, Google, Asana, Slack?)

"Responsibility is the possibility of opportunity culminating in inevitable fulfillment." -Sri Chinmoy





CULTURE

*What kind of people make up your agency as a whole?
What is your agency like as a partner?*

After identifying the team members who will be working on your project, the big question is: Do you gel?

The agency you choose will become your team for the foreseeable future (and ideally longer), so it's crucial to work with people you genuinely enjoy. This is where company culture makes the biggest impact. Even if culture seems like a trivial factor for your project, office vibes, team-building activities, and employee hobbies can say a lot about an organization's atmosphere and priorities. In the end, these factors could have a big impact on your relationship with the agency and, ultimately, your project.

When it comes down to it, people do business with people they know, like, and trust. This works both ways. The marketing agency that you choose to pursue should wholeheartedly believe in what your company is doing. If your beliefs and vision don't align with one another, you won't create good work. Simple as that.

Remember you're not just working with an agency. You're working with real people. Are these the kind of people you'll enjoy establishing a relationship with? Do you get along? Are these the personalities you want to comprise your team?

Relationships matter. So pick people you like.

QUESTIONS TO ASK

- What makes your company personality unique?
- What does your team like to do for fun?
- What does a typical day in the office look like?

*People do business with people
they know, like, and trust.*



LOGISTICS

How much will this cost? How long will the project realistically take?

BUDGET

At the end of the day, a partnership cannot exist if logistics do not align. No matter how great of a fit a marketing agency is for your company, if it does not fall within your price range or time frame, it is not a probable candidate.

Always approach a project with a budget in mind, even if it's just a ballpark number. One of the most significant considerations in the agency selection process is finding a team that can execute on all your project deliverables while staying within your determined budget. Having an estimate of costs before starting the project will help both your company and the agency not waste time considering a partnership that, in the end, doesn't fall within your budget constraints.

Budget considerations include:

- Making sure to compare prices between agencies to confirm you're paying a standard price for the service. At the same time, understand that agencies will offer various levels of pricing based on experience, clientele, and capabilities.
- Inquiring about overage rates or fees for projects that run into issues or take longer than expected.
- Understanding the agency's pricing structure (pay per hour and materials, per project, retainer, commission, etc).

QUESTIONS TO ASK

- Are you able to deliver the project within our budget parameters?
- Does your agency charge for unexpected issues or overtime?
- What is your pricing structure?
- Can you provide a general timeline of the project phases?

TIMELINE

You're likely operating on a specific timeline for your project, so the right agency partner will be limited to whoever is available to deliver your project by the required deadline. If you have a good idea of the breadth and details of your project, an agency should be able to give you a projected time-frame for how long the project will take, including dates for important benchmarks along the way.

To better understand an agency's availability, ask about its current workload and upcoming projects. While it's good for an agency to have other projects on its plate, take heed if you feel like your project might end up getting put on the back-burner to larger accounts. Additionally, asking about past projects with similar needs can help you effectively gauge the agency's ability to deliver within your deadline.

Remember – creative development takes time, but it's worth the wait!

REFERENCES

Who can I talk to about their experience with your agency?

The best way to determine what an agency is truly like to work with is to ask those who have worked with them in the past. In most cases, you won't be the first-ever client, so do your research to learn from others who have already experienced a partnership with the agency in consideration. Seek out testimonials and reviews online to gain honest insight and potential problems that may arise. Understanding specifics about their past experiences allow you to form opinions of your own. A big issue to one client may not be such a big deal to your specific company. Don't be afraid to ask for references from other clients in your same industry or with projects similar to yours. Getting the opinion of those who have firsthand experience can shed light on an agency's ability to deliver a satisfactory project while maintaining a positive relationship.

If you are planning to contact some past clients, chat with them about certain projects or designs the agency may have mentioned. Ask about budget, time, collaboration, and overall quality of work they experienced. Make sure to include questions about the support the client received after the project was over. Find an agency that recognizes the importance of ongoing marketing support and is available to offer its continued support as your needs evolve.

Don't be afraid to ask for references from other clients in your same industry or with projects similar to yours.

QUESTIONS TO ASK

- Can you point me to a good place online to read reviews/testimonials?
- Can you connect me with a previous client I can chat with about their experience working with you?
- Can you send us some examples of websites/projects you've done that are similar to ours?



METRICS/REPORTING

How will you measure the success of this project?

Any agency you're considering should have a step in its process that includes measuring results. Although the results for some projects may be more difficult to track (i.e. logo design or brand awareness), your ideal agency partner will help you determine specific goals and identify the corresponding metrics to evaluate their success. Do you want to gain new leads? Increase sales? Boost brand awareness? Your metrics should be specific and measurable, and your agency's deliverables should cater to achieving these goals.

Regardless of the platform or method the agency prefers to use, part of your project needs to include reporting on the analytics you'll be tracking. Select a partner eager to deliver data-driven results, with hard proof of the return on your investment. Find out how the agency plans to provide reports on its progress and if it will be a resource in interpreting data that may be beyond your scope of understanding.

Increased sales, more website traffic, new leads?

What gets measured gets improved.

QUESTIONS TO ASK

- What reporting tools do you use to demonstrate ROI?
- How often and through what channels will you provide analytics to us?
- What's your process for optimizing results based on your findings from analytics?



WEBSITE SPECIFIC QUESTIONS

If you're looking for digital support specifically, it's helpful to ask a few clarifying questions to determine if an agency has the right potential to meet your project needs. Here are some things to remember when you're on the hunt for a partner to enhance your digital presence:

TECHNOLOGY/FRAMWORK SUPPORTED

While some agencies offer a niche focus on a particular web platform, your company will likely benefit from an agency that is "platform-agnostic" for its web development. Without a bias towards a specific platform, an agency is able to evaluate your project objectively and make a recommendation on a web platform that best fits your business needs, as opposed to following a one-size-fits-all method.

Have an idea of which features your new website needs to best display your products or services. Research which applications and platforms can most effectively build your site, and investigate to determine if prospective agencies will be able to deliver.

ADMINISTRATION & MAINTENANCE

Keep in mind, the best agency partner doesn't build a complex site and then withhold the keys to the kingdom so you have to rely on it for updates or changes. A good agency partner will use its expertise to develop a sophisticated site on a platform that can be maintained and administered by even the most non-technical team members. Your website should be delivered to you – along with the keys – for full dominion over your product, while the agency remains available as an expert resource to support you as needs arise.

QUESTIONS TO ASK

- What platform(s) do you prefer to design on?
- Do you design mobile-friendly and responsive sites?
- Will I have full access to the back-end of my website?
- What kind of training and support do you provide for website administration?

MORE WEBSITE QUESTIONS

How many people browse websites on a mobile device?

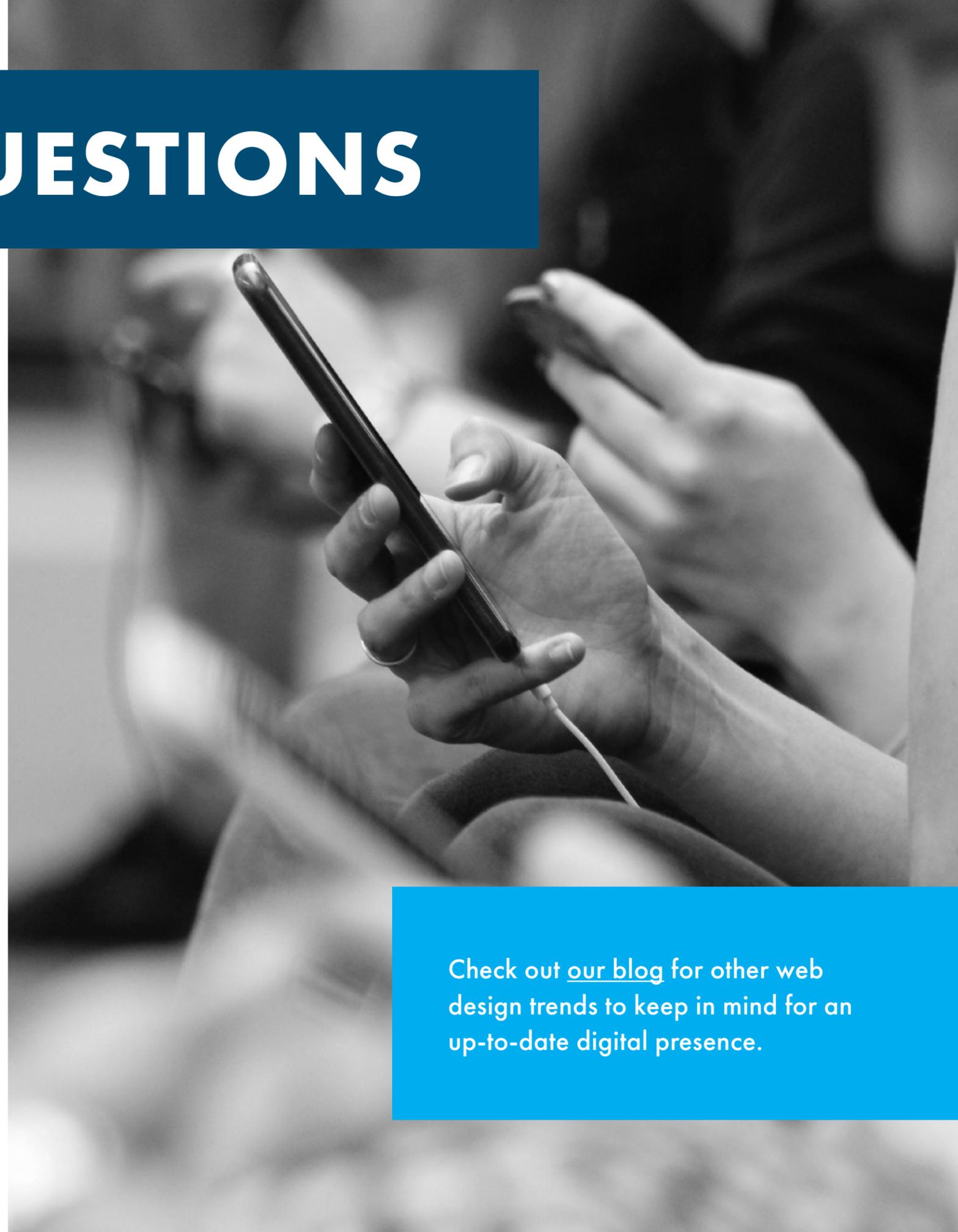
MOBILE COMPATIBILITY

In today's technological era, 50 percent of websites are already mobile-friendly – a number that continues to rise each year. More than ever before, consumers are accessing the internet through their mobile devices, meaning a mobile-friendly site is absolutely crucial for businesses seeking growth and a positive user experience.

Choose an agency that can build a responsive site that adapts to various devices, browsers, and operating systems so that your customers have a seamless experience on your site no matter where they're accessing from. The right agency partner will understand the fundamental principle of designing with your customers – and the future – in mind.

In 2018, 52.2 percent of all website traffic worldwide was generated through mobile phones.

Check out [our blog](#) for other web design trends to keep in mind for an up-to-date digital presence.



CONCLUSION

A black and white photograph of a person sitting at a desk, writing in a spiral notebook. The person is wearing a dark t-shirt. On the desk, there is a keyboard, a pair of earbuds, and some papers. The background is slightly blurred, showing what appears to be an office or workspace.

All in all, choosing the right out-of-house marketing agency takes a lot of time and consideration. The best way to find out which marketing agency is the best for your company's specific needs is to ask the right questions. While marketing materials or customer reviews are great for first round picks, questions allow you to get a better understanding of the capabilities, culture, and overall expectations that will lead you to the most rational and educated decision.

If you're in the process of seeking out an agency partner, we welcome you to [test the waters with HMG Creative!](#) Try out the questions you've learned in this book. We'd love to chat more and work through the process to see if our agency is a good fit for your organization and project.

Although it's unlikely that you'll find an absolute perfect match, it's important to keep in mind each of the different factors that these questions bring into light. A great match should check most of the important boxes rather than just a few. In the end, make sure the people you work with are people you not only trust, but also respect.