

Agency Hiring Checklist

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Use this checklist when evaluating, hiring, and onboarding a marketing agency. Based on Forrester, CMI, and Econsultancy research on agency-client relationships.

1. Pre-Selection Criteria

- Define scope explicitly: list every deliverable, channel, and frequency before briefing agencies
- Set budget range: typical UK B2B retainers are £5-15K/month for full-service boutique agencies
- Identify 3-5 agencies via referrals, G2/Clutch reviews, and industry shortlists
- Verify agency has B2B experience in your sector (not just B2C or different verticals)
- Check agency size: 10-30 staff boutiques typically deliver better SME attention than large agencies
- Confirm they work with companies your size (50-250 employees) — not just enterprise clients
- Ask who will actually work on your account (not just the pitch team)

2. Evaluation & Due Diligence

- Request 3 case studies from companies similar to yours (size, sector, budget)
- Ask for named client references you can contact directly
- Review their own marketing — does their website, content, and SEO reflect competence?
- Evaluate strategic depth: do they ask smart questions about your business, or just discuss tactics?
- Request a sample content piece or audit to assess quality before committing
- Ask about their reporting cadence and metrics — monthly reports should be standard
- Confirm integration capability: can they work with your HubSpot/Salesforce/existing stack?
- Check client retention rate — below 60% is a red flag for B2B agencies

3. Contract Negotiation

- Start with a 90-day pilot, not a 12-month lock-in — test fit before committing
- Define explicit deliverables with quantities and deadlines per month
- Include a formal change control process for out-of-scope work (prevents scope creep)
- Specify who owns creative assets, data, and accounts if the engagement ends
- Negotiate a 30-day notice period (not 90 days) with clear exit terms
- Cap annual price increases at 5% or tie to CPI — agencies typically push 5-8%
- Include performance KPIs with quarterly reviews (specific metrics, not vague goals)
- Require a Data Processing Agreement (DPA) for GDPR compliance

4. Onboarding & Knowledge Transfer

- Budget £2-5K and 2-4 weeks for a proper discovery/onboarding phase
- Provide brand guidelines, tone of voice, buyer personas, and competitive positioning docs
- Grant tool access: CRM, analytics, social accounts, CMS (use restricted permissions)
- Introduce agency team to your sales team — alignment prevents lead quality disputes
- Establish a shared project management tool (Asana, Monday, Trello) with clear workflows
- Set weekly or fortnightly sync cadence — not just monthly reporting calls
- Define escalation paths: who approves what, response time expectations, emergency contacts

5. Red Flags — Walk Away If You See These

- They guarantee specific rankings or lead numbers before understanding your business
- The pitch team won't be your day-to-day team (bait and switch)
- No case studies from companies your size or sector
- Require 12+ month contracts with no pilot period
- Cannot explain their reporting methodology or attribution model
- Push back on performance KPIs or quarterly reviews
- Won't provide named references from current clients
- Their own marketing (website, content, social) is poor quality

Sources: Forrester Build vs Buy Marketing Talent Report (2024); CMI Agency Pricing Study (2024); Econsultancy UK Marketing Ops Survey (2024)

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