



**QUESTIONS
MARKETING
DIRECTORS
SHOULD ASK
WHEN
INTERVIEWING
AGENCIES**



Table of Contents:

How familiar are you with my business's marketing goals and needs?	1
How are you going to help me reach my business goals?	2
What services can you offer me?	4
How do you track your efforts?	5
What will reporting and analytics look like?	6
What does a good client and agency relationship mean to you?	8
Who will be managing my account and what does communication look like?	10
Can we discuss contracts and service agreements?	11
Checklist	12



8 Questions Marketing Directors Should Ask When Interviewing Agencies

We get it. Commitment can be scary, especially if you don't know how to ensure that you choose an agency that will actually meet your needs and reach your business goals. By asking these eight questions when interviewing agencies, you'll be able to weed out the good from the bad and find the right fit for you. Because if an agency can't answer these questions, let's be real, they're probably not up to par.

1 How familiar are you with my business's marketing goals and needs?

To get this proverbial party started, although we can turn it into a real party if you want, we're kicking it off with the first question that a marketing director should always start by asking when interviewing an agency. Now, there are agencies that specialize in different things, whether that's brand awareness and engagement or driving sales. ***When looking for an agency, you want to start off by first making sure that their skill set and experience align with the goals that you have for your business.***

Most companies are ultimately looking to increase their sales and sometimes that gets confusing because they think marketing is solely about awareness. ***It's not just about awareness and that's why the agency you choose to work with has to have the skill set required to hit the real goals you have for your business.***



2 How are you going to help me reach my business goals?


For an agency to hit and reach the real goals you have for your business, you need to already have those goals established. If you're a marketing director, you want to know what your marketing goals and KPIs are. If KPIs are something that you need to engage an agency to help with, that's fine, but just know that you should definitely have a clear set of goals laid out before you get started.

Any agency that you start engaging and having conversations with should be asking about your goals. If they're not, then there's already something off. Giant red flag number one. Big warning sign. Alarms should be going off in your head. You get the point. Make sure that the agency is truly driven to help you achieve what it is that you're after. ***What process do they have in place? What have they done in the past to help similar companies, whether in the same or other industries, get the kind of results you're after?*** That's called foreshadowing right there, and it can provide valuable insight as to if the agency has a proven way to repeat their success.

A big thing companies on both sides of the engagement miss out on is ensuring that goals and KPIs are realistic and reachable. Both parties need to know exactly what they're getting into. It's like dating.

You have to be on the same page before you commit. If a marketing agency is "yes-ing" you to death, not going in-depth or getting into the nitty-gritty, that's another red flag to run the other way because it probably means they don't have the answers. It's an agency's job to ensure that there are agreed-upon KPIs and proper





strategies in place that focus on hitting your metrics, by whatever means they have within their arsenal. ***An agency should be focused on fostering results that jive with your stated KPIs while simultaneously ensuring that you can focus on running your business.***

It's on the agency to ensure that they're doing the legwork to both lay and understand the groundwork. A good agency should be doing that leg work upfront during the onboarding process. That's why we sit down with our potential new clients and candidly talk about what we will be able to do and what we might not be able to do. ***There should be total transparency and a complete understanding between a client and agency when establishing KPIs and determining what is realistic and measurable.*** If there's even a sense of slight doubt, ask the agency to define how they attack challenges to ensure a comfort level with what they answer. Agencies vary from one another in how they tackle challenges, so an agency's answer has to speak to you and your business.



3 What services can you offer me?

We've talked about setting business goals and now it's time to get into the ways to methodically go about meeting them. This becomes a question of services vs. solutions. A lot of companies, when they first start looking for an agency, are thinking about services. ***An agency that offers services is not going to be a strategic partner that comes in with a playbook of what needs to be done.*** The concept of services revolves around the scenario where a marketing direction already has a game plan and just needs someone to come in and execute, not necessarily someone who's going to share your vision and speak it into existence by really moving the needle.

The other approach, which is what we like to implement as a 360-degree approach to marketing, is based on providing a solution rather than services in silos. When someone comes in and says, "We need to increase sales" or "We have a solid sales mechanism in place but we just need to fill our funnel," that's when an agency can help you with a legitimate solution. That's when the two parties can sit down together and collaborate on what the strategy is going to be and how you are going to hit your benchmarks. If you're considering looking for an agency based on services, that means you already have your game plan and strategy, but you just don't have the hands-on-deck in house to do it so you need to subcontract out the legwork. On the other hand, if you're looking for someone to really help you reach your goals, provide solutions and strategic advice, that's when you look for an agency that can be a true partner to you.



4 How do you track your efforts?

Everything that you do in marketing, especially digital marketing, needs to be measured to understand how campaigns and tactics are performing. Throughout the entire process, an agency should be tracking their efforts to show you both the actions that are being performed and the results that come from them, whether positive or negative. People hate hearing the word “negative,” but, more often than not, the negative is way more important. The positives are great, don’t get us wrong, but the real, nitty-gritty growth comes from pivoting and improving from the negatives. ***Think of the 80/20 rule. 80% of the tests you try will fail, 20% of the tests you try will be successful and drive 80% of your success.*** Tracking the negative results enables an agency to know how to make adjustments and improvements going forward.

When it comes to tracking, here are a few, simple things that a marketing agency needs to have in place. They need to be using Google Analytics, and maybe even Google Data Studio. If they’re going to be working on an SEO play, make sure they’re using Google Search Console. For email marketing, ask which marketing automation tools would be best for your business. Also, talk to them about the current CRM you’re using or see if they can help you implement that. ***Ultimately, be confident in the fact that they are able to either support the tools that you’re currently using or help you implement tools that are going to fit and fortify the way your business operates.***




5 What will reporting and analytics look like?

Once an agency starts tracking their efforts, they also have to start analyzing them and report the findings to you.

There used to be this standard of basic PowerPoint presentations. People would put these together and just pull different numbers. In today's world, we're able to set up real-time analytics dashboards, allowing us to check in and have constant access to data. ***It's up to you and your agency to decide what reporting will look like, depending on what works for you.*** Whether that's having them stand up in the front of the room and present their data and finding, having your own access to their real-time dashboards or somewhere in between, it all depends on how much you want to know what's going on.

This structure and setup may also change as time goes on, the relationship strengthens and trust builds. Maybe, in the beginning, you want to see things a little closer, a little more consistently. Then, as things progress and you see results, you don't have to check in as regularly. In terms of communication early on, it's better to have a cadence that is over-communicative. At the beginning of a relationship, we often start with weekly reporting with our clients, and then, over time, you get into a groove where you can start to do bi-weekly, or monthly or quarterly reporting. ***A good rule of thumb is to have a cadence with more frequency at the beginning of a relationship to ensure that both teams are running parallel paths.*** Over time, you can usually pare back the frequency as both parties get to know each other and gain trust. Together, you'll learn what's working and what's not.





At its core, marketing really is somewhat of an educated guess. ***It's on the agency to over-communicate expectations up front and to continue to be clear about that when things start to get rolling.*** As downright cheesy as it is, honesty is the best policy and it's better to communicate everything, and we mean everything, early on. That way, everyone's on the same page and there's no surprise when you get a quarterly report and realize everything is complete trash, in technical terms. ***There's this inherent level of risk going to any marketing engagement, making clear communication and expectation-setting all the more necessary.***

At DSM, for instance, when it comes to reporting presentations and building trust, it's imperative for us to sit down in a room with our clients face-to-face. It's a part of what's been vital in building our relationships and fostering our success as a New Jersey agency for New Jersey businesses.



6 What does a good client and agency relationship mean to you?

Okay, now things are getting intimate. We stressed the importance of establishing business goals out of the gate, but we also have to talk about setting goals and expectations in terms of how both businesses operate. How many times have you heard that “a relationship is a two-way street?” Probably a lot, right? Well, you’re about to hear it again. Sorry, not sorry.

If you’re going 80 one way and your agency is going 80 but in the complete opposite direction, you each may be traveling fast but you’re never going to get to the same final destination. It’s just not going to happen. If an agency doesn’t take the time to get to know your company and how you work, and they just throw a proposal out there because they want to get the business, you have no clue if you’re going to be a good fit for each other in the long term. Pretty sketchy, don’t you think? On the flip side of that, clients are often anxious to get started right away, so much so that they’ll want to bypass the determining, foundational steps and just have the work done ASAP. In both scenarios, everyone puts themselves in a bad position because nobody stopped to take the time to analyze the relationship to begin with.

The relationship also has to have the right company culture fit, too. ***Yes, office culture is a huge, trendy topic that everyone talks about on LinkedIn, but it’s also something to be critically mindful of when choosing an agency.***

Knowing what you like and don’t like about an agency is very important to decide on during the vetting process. You may be looking for a specific type of agency that caters to a vertical specificity or one that has a more diverse clientele. Be sure to do your homework to protect yourself from wasting time on the wrong agency.



Know before the interview what you want and factor in the personality and culture of an agency as an essential part of that decision process.

Ensure that the morals of both entities line up or the relationship is going to suffer. Take your time when finding a partner and make sure the one you choose is one that you trust implicitly. It will pay big dividends throughout the relationship and ensure a level of mutual understanding that sets the overall tone and the groundwork for the success to come.

At DSM, we're an acquired taste. At least we're self-aware and we know that. We are who we are, we do really good work and we're picky about our clients. We make it a point to understand what our clients are all about to assure that we can both deliver a good product and all have fun while doing it. ***When hiring an agency, ask yourself this: do you want to have a beer with these people at six o'clock on a Thursday night?***



7

Who will be managing my account and what will communication look like?

As a marketing director, knowing your main point of contact is an integral part of fostering that solid client and agency relationship. You need to have a main point of contact and, again, it has to be somebody you can trust.

Keep in mind that most agencies do work in teams to ensure proper coverage in the case of a team member's absence, or to delineate responsibility within the group to ensure that everyone is focusing on their strengths. The number of team members you'll work with directly varies based on the agency as well as your needs. ***A general, good rule of thumb is to look for an agency that isn't bloated employee-wise.*** In the end, you'll end up paying for it in more ways than one if you find that there are too many people involved.

All of the work we do at DSM follows concise systems that allow for smaller teams to work faster and smarter. That's what works for us, and you have to find the agency structure that works for your business structure.

If you're not someone who likes to talk on the phone every day and you prefer to be contacted through emails, tell an agency that right out of the gate. That's one of the first questions we ask during a new client onboarding meeting and for good reason. Just be straight up about what you prefer so that both parties can come to an agreement on the most productive, effective and realistic communication methods as early on as possible, keeping goals and workload in mind. You know your own preference for communication and a good agency should be able to adjust accordingly. ***At the end of the day, if an agency can't match the cadence and the communication you need, they're probably not the right fit.***



8 Can we discuss contracts and service agreements?

Once these first seven questions have been asked and you feel 100% confident in an agency's answers, then comes discussing contracts and service agreements.

DSM has worked long and hard to get clients out of the old-fashioned model of retainers. ***It's not about a bucket of hours to get stuff done; it's about delivering results and doing whatever it takes to make that happen.*** That's why it all boils down to transparency and honesty during the initial stages of and throughout the entire relationship. You, as the client, have to be upfront about what you need and what you want to achieve. ***Then, it's on the agency to tell you, realistically, what it will take to achieve and deliver on that.***

If it's not the right fit or it's not within your budget, that's cool. We're cool. We're totally cool. Seriously, we just need to know.

We've given you the questions you need to get the answers you need, so now it's time to fly bird, fly. Go out there, stand tall and be confident in your agency choice.

To help you along the decision making process, we've created a checklist for you to refer to while interviewing and vetting agencies. Use it as your Marketing Agency Bullsh*t Shield (trademark pending).

Haven't applied for your free strategy session yet?

Head to thedsmgroupp.com/apply-strategy-session to apply for a free, 45-minute strategy session with our marketing experts. Ask us your questions, use that checklist and let's see if we're a good fit.



8

QUESTIONS MARKETING DIRECTORS SHOULD ASK WHEN INTERVIEWING AGENCIES

- How familiar are you with my business's marketing goals and needs?**
- How are you going to help me reach my business goals?**
- What services can you offer me?**
- How do you track your efforts?**
- What will reporting and analytics look like?**
- What does a good client and agency relationship mean to you?**
- Who will be managing my account and what does communication look like?**
- Can we discuss contracts and service agreements?**





thedsmgroup.com

575 Corporate Drive, Suite #510
Mahwah, NJ 07430
(201) 485-7777