



CATALYST

A B2B BRAND CONSULTANCY

BrandMatters

[www.catalystb2b.com](http://www.catalystb2b.com)

White Paper

# How Do You Rate Your Ad Agency or Marcom Firm? Here's A Checklist.



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"If we keep doing what we're doing, we're going to keep getting what we're getting."

—Stephen R. Covey

The client-agency relationship is one of the most complex in business, requiring a substantial level of collaborative effort to be effective. When a client and agency get together, it's not unlike a marriage that requires a healthy dose of give and take. And often, like marriages, not all client-agency relationships work. In fact, the trend is that underperforming relationships are terminated quicker than ever. In 1984, the average client-agency relationship tenure was 7.2 years. By 1997, that number declined 25% to 5.3 years. If the trend continues, by 2010 clients will search for a new agency every 4 years.

The key to success is to maintain an open, honest dialogue throughout the relationship – always concentrating on identifying areas for mutual growth and improvement, and on outlining specific steps which each party can take to produce a stronger relationship and better results together.

Below is a rating checklist you can use to rate your agency's performance. Use the results as a conversation starter. Ask your agency to review you too. Regular, systematic dialogue will help you both get the most from your partnership.

Please note that the **rating system uses a 1-to-10 index**, with 10 being the highest score, 5 representing "acceptable, average" performance, and 1 reflecting "poor, unacceptable" performance.

If you find that the scores for your current agency partner simply are not acceptable across the board, call Catalyst. It's possible we can offer a fresh perspective and improved results.

Continued...

ACCOUNT MANAGEMENT	Rating (1-10)
1. Regularly engages in proactive, rather than reactive problem-solving?	
Comments:	
2. Independent thinkers capable and willing to express opinions?	
Comments:	
3. Develop sound strategies and points of view backed by sound rationales?	
Comments:	
4. Think creatively and continually bring us fresh ideas?	
Comments:	
5. Attention to detail and crisp follow-through?	
Comments:	
6. Understand our business and market, including the competition?	
Comments:	

CREATIVE	Rating (1-10)
1. Involved in overall marketing strategies?	
Comments:	
2. Accepting of client suggestions?	
Comments:	
3. Meets timetables?	
Comments:	
4. Cost conscious?	
Comments:	
5. Fresh ideas? Breaking new ground?	
Comments:	
6. Willing to experiment?	
Comments:	
7. Recommendations supported by strong rationale?	
Comments:	
8. Tactical materials development supports the strategic brand intent?	
Comments:	

<b>PRODUCTION</b>		<b>Rating (1-10)</b>
1. Meets timetables?		
Comments:		
2. Cost conscious?		
Comments:		
3. Timely cost estimates and schedules?		
Comments:		

<b>MEDIA</b>		<b>Rating (1-10)</b>
1. Recommendations reflect an understanding of the business?		
Comments:		
2. Recommendations reflect innovative media thinking?		
Comments:		
3. Proactive / demonstrate initiative?		
Comments:		
4. Provides necessary documentation?		
Comments:		
5. Accepts client direction and point of view?		
Comments:		
6. Provides necessary value-add beyond expectations?		
Comments:		

<b>FINANCE / ADMIN SERVICES</b>		<b>Rating (1-10)</b>
1. Billing procedures reflect a well-run internal accounting operation?		
Comments:		
2. Billing is typically close to the estimate?		
Comments:		
3. Paperwork flow is timely and accurate?		
Comments:		
4. Maintains adequate files and documentation?		
Comments:		
5. Questions and concerns are handled promptly and properly?		
Comments:		

OVERALL EVALUATION	Rating (1-10)
Do you have specific suggestions for improvement regarding:	
Account Management?	
Creative?	
Media?	
Production?	
Finance / Admin?	

RECOMMENDED ACTION PLAN	Rating (1-10)
Areas to improve?	
1.	
2.	
3.	
Working process improvements?	
1.	
2.	
3.	

To learn more, contact:  
Brian Odell  
President  
(401) 732-1886  
bodell@catalystb2b.com  
www.catalystb2b.com