



CATALYST

A B2B BRAND CONSULTANCY

BrandMatters

www.catalystb2b.com

White Paper

How Do You Rate As A Client? Here's A Checklist.



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"To control your cow, give it a bigger pasture." —Suzuki Roshi, Zen Master

Clients and their marketing agencies are constantly striving to improve their client-agency relationship, but often the client organization blames the agency for the problems the relationship encounters. Like any relationship, that of the client and the agency requires work and compromise from both parties. Yet, it's frequently the client who fails to take a look in the mirror and assess whether or not they are providing the proper inputs into the partnership to foster an environment for quality strategic and creative services from their agency.

Ever wonder how you might be perceived by your agency partners?

Utilize this form to serve as a basis for a relationship review meeting. Fill it out as a self-review and then ask your agency to critique you as well. You might create your own document to evaluate your agency's performance as well.

The purpose is to concentrate 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.

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.

Continued...

| MARKETING | Rating (1-10) |
|--|---------------|
| 1. Do you have a detailed written marketing plan? | |
| Comments: | |
| 2. Has your marketing plan (written or unwritten) been adequately communicated to the agency? | |
| Comments: | |
| 3. Is the agency regularly invited to assist in the marketing planning and development process? | |
| Comments: | |
| 4. Does the client routinely provide the agency with up-to-date information on products, services, markets, and competition? | |
| Comments: | |
| 5. Has client prepared, and shared with the agency, meaningful research relevant to the communications task? | |
| Comments: | |
| 6. Does the agency have necessary access to key non-advertising personnel and management? | |
| Comments: | |

| MANAGEMENT | Rating (1-10) |
|--|---------------|
| 1. To what degree do your contact people demonstrate a working knowledge of advertising agency procedures and practices? | |
| Comments: | |
| 2. Do all of your people have a thorough understanding of their own products and services – and the value they provide? | |
| Comments: | |
| 3. Is your team organized and helpful in the preparation and discussion of project assignments for the agency? | |
| Comments: | |
| 4. Do you normally provide the agency with sufficient project lead time? | |
| Comments: | |
| 5. Are you responsive to legitimate agency suggestions regarding strategies and tactics? | |
| Comments: | |
| 6. Are you prompt in replying to agency requests for information and / or meetings? | |
| Comments: | |
| 7. Does your team's attitude encourage the agency to move the overall communications task forward? | |
| Comments: | |

| PROJECT REVIEW | | Rating (1-10) |
|---|--|---------------|
| 1. Are you helpful and decisive in initial project / concept review? | | |
| Comments: | | |
| 2. During the project review process, do your instructions reflect previously agreed-upon strategies? | | |
| Comments: | | |
| 3. Do you expedite the approval process? | | |
| Comments: | | |
| 4. Are you specific in communicating requests to the agency for design and content modifications? | | |
| Comments: | | |

| ADMINISTRATION | | Rating (1-10) |
|--|--|----------------------|
| 1. Is your staff prompt and accurate in its handling of administrative detail? | | |
| Comments: | | |
| 2. Do you present adequate budget information as a guideline for agency planning? | | |
| Comments: | | |
| 3. Are your budget expectations adequate for the reality of the marketing environment? | | |
| Comments: | | |
| 4. Is your payment of invoicing prompt? | | |
| Comments: | | |

| RELATIONSHIP | | Rating (1-10) |
|---|--|----------------------|
| 1. Do you treat your agency like a true marketing communications partner? | | |
| Comments: | | |

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