

How to use this checklist
Evaluate your current agency OR compare two partners side by side. Work through each section, marking YES or NO for each agency. Add notes, then score each agency 1–5 per category in the Scoring Summary on the final page.

 1. Communication & Responsiveness	Agency A	Agency B
<input type="checkbox"/> Returns calls and emails within 24 hours	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Dedicated point of contact assigned to your account	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Proactively reaches out — doesn't wait for you to chase	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Schedules regular check-in calls / status meetings	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Transparent about timelines, delays, and project status	<input type="checkbox"/>	<input type="checkbox"/>
<i>Notes:</i>		

 2. Results & Performance	Agency A	Agency B
<input type="checkbox"/> Sets clear, measurable KPIs at start of engagement	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Can share verifiable case studies from similar businesses	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Sets realistic expectations — doesn't overpromise to win business	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Owns poor results honestly rather than making excuses	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Has experience in your industry or with businesses your size	<input type="checkbox"/>	<input type="checkbox"/>
<i>Notes:</i>		

 3. Strategic Thinking & Business Understanding	Agency A	Agency B
<input type="checkbox"/> Takes time to deeply understand your business goals	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Brings new ideas proactively — without waiting to be asked	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Constructively challenges your thinking when they disagree	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Tailors strategy to you — not a cookie-cutter approach	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Can speak knowledgeably to trends in your market	<input type="checkbox"/>	<input type="checkbox"/>
<i>Notes:</i>		

 4. ROI Reporting & Transparency	Agency A	Agency B
<input type="checkbox"/> Reports on business outcomes (revenue, leads) — not just vanity metrics	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Reports are easy to understand with clear context and takeaways	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Explains what's working, what isn't, and what comes next	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Willing to share data access (ad accounts, analytics, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Proactively flags problems — doesn't wait for you to notice	<input type="checkbox"/>	<input type="checkbox"/>

Notes:

 5. Billing Practices & Scope Integrity	Agency A	Agency B
<input type="checkbox"/> Pricing is clear and documented upfront with no surprise fees	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Small revisions and minor changes are included — not billed separately	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Provides detailed invoices that match agreed-upon deliverables	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Contract is flexible with reasonable notice periods	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Handles scope changes with a fair, transparent change order process	<input type="checkbox"/>	<input type="checkbox"/>

Notes:

 6. Team Stability & Experience	Agency A	Agency B
<input type="checkbox"/> You meet the actual team who will work on your account before signing	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Long average client tenure (a sign of healthy culture)	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Low staff turnover — team members don't frequently change	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Clear escalation path if your main contact leaves	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Leadership stays involved beyond the onboarding phase	<input type="checkbox"/>	<input type="checkbox"/>

Notes:

 7. Partnership, Culture & Chemistry	Agency A	Agency B
<input type="checkbox"/> Treats you like a priority — not just another account	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Communication style matches your team's culture	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Celebrates your wins and shows up when things go wrong	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Values align with yours: integrity, creativity, accountability	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> After speaking with them, you feel excited — not just satisfied	<input type="checkbox"/>	<input type="checkbox"/>

Notes:

Scoring Summary

Rate each agency 1 (poor) to 5 (excellent) per category. Total the scores to find your strongest partner.

Category	Agency A (1-5)	Agency B (1-5)
1. Communication & Responsiveness	___ / 5	___ / 5
2. Results & Performance	___ / 5	___ / 5
3. Strategic Thinking	___ / 5	___ / 5
4. ROI Reporting & Transparency	___ / 5	___ / 5
5. Billing Practices	___ / 5	___ / 5
6. Team Stability	___ / 5	___ / 5
7. Partnership & Culture	___ / 5	___ / 5
TOTAL SCORE	___ / 35	___ / 35

Final Decision

Agency A — Final Notes	Agency B — Final Notes
<input type="checkbox"/> Move Forward <input type="checkbox"/> Pass	<input type="checkbox"/> Move Forward <input type="checkbox"/> Pass

Need help evaluating your options? We'd love to walk through this with you. thecreativestable.com