

# AGENCY PARTNER SCORE CARD

Here is a direct, data-driven scorecard template based on core non-negotiables. You should score each item from 1 (Red Flag/No Process) to 5 (Clear, Repeatable System).

## AGENCY PARTNER SCORECARD: VETTING FOR EXECUTION

This scorecard is designed to vet a partner's **full-service managed marketing execution** capability—meaning, their workflows are what you are buying, not just their creative output. We are looking for proof that their **marketing operations** are tight enough to eliminate **revenue stagnation from scattered marketing execution**.

Category (Our Non-Negotiables)	The Right Question to Ask	Score (1-5)	Rationale & Expectation
<b>Strategy Fit</b>	1. How would you turn our business goals into a marketing execution plan?		<b>Expectation:</b> They must start with your business outcomes (revenue, pipeline, cost-of-acquisition), not random deliverables (blog posts, social posts). If they jump straight to channels, that's a red flag.
<b>Channels &amp; ROI</b>	2. How do you decide which channels will drive the biggest ROI for our business?		<b>Expectation:</b> They need to explain a data-backed methodology for channel selection. If they push a standard package (SEO/social/email) without justifying why it fits your audience, they are operating on autopilot.
<b>Team Structure &amp; SLAs</b>	3. Who will perform the work and what roles do they fulfill?		<b>Expectation:</b> You are buying a team. You need clear names and defined roles. If the entire operation runs through one overloaded account manager, the process will fail. <b>SLAs</b> (Service Level Agreements) should be explicitly mentioned here—I want deadlines, people.
<b>90-Day Workflow</b>	4. If we moved forward, what would a typical first 90-day roadmap look like?		<b>Expectation:</b> Look for a clear, repeatable process: Onboarding > Audit > Planning > Execution. No clear roadmap means they are building the airplane while flying it.
<b>Execution &amp; Content Alignment</b>	5. How will you learn our industry, audience, sales process, and brand voice?		<b>Expectation:</b> They must have a specific workflow for immersion. If they just say "we'll read your website," they will produce generic content. They need to show they can create accurate, relevant marketing that aligns with your sales needs.
<b>ROI Accountability &amp; Reporting</b>	6. What's included in the monthly reports and how will you explain what the data means?		<b>Expectation:</b> Reports should be strategic and actionable. If it's just a dashboard of vanity metrics (likes, shares, traffic volume), they can't explain the math of how it connects to the pipeline. If they can't explain the math, walk away.

## THE TAKEAWAY

You're vetting for a partner's *ability to execute*. If they can't clearly walk you through the day-to-day **workflows** for ownership and follow-up, they are not a fit.

At Witmer Group we always say: **Process before product. Always.**