



What to Consider When Partnering with a Digital Marketing Agency

So you want to hire a digital marketing agency. That's not a big surprise given that 60% of small businesses consider online marketing and sales an important part of their growth plan. From content marketing to paid media, investing in digital marketing is a great idea – once you hire them, of course.

There are several moving parts to choosing the right digital marketing agency. Just like when you're building a new website, it takes multiple steps and a lot of planning to find the right partner. Even a few missteps can cause quite a tumble, and there are plenty of opportunities to fall flat on your face.

That need for organization is why it's smart to use a checklist before onboarding a new partner to help ensure you have all your bases covered. From overall goals to account access, there are plenty of important factors you'll want to keep top of mind. We've put together a thorough checklist of considerations to help you make the process of evaluating, choosing, and ultimately onboarding a digital marketing partner as smooth as possible.

Aztek's Digital Marketing Agency Checklist: Everything Clients Should Consider When Partnering with a Digital Marketing Agency

Goals

- What are the goals of the partnership?
 - Are there specific pain points or frustrations you want to correct by partnering with an agency?
If yes, list them.
 - Are there specific revenue goals, product/service growth to focus on?
 - Describe what a successful partnership of this type looks like to you.
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Target Audience

- What audience(s) will marketing efforts be focused on? List all that apply.
 - What kind of information are they looking for?
 - What kinds of action should they be taking (what are we trying to get them to do)?
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Project Management

- Who will be the main point of contact for your organization?
- Who has the power to make decisions and approve deliverables?
- Have you assigned responsibilities to other team members from your organization to assist with the project?
 - List all team members and the area they will be responsible for.
 - Do they understand their roles and responsibilities?

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Analytics

- Do you have existing Analytics accounts? Ensure you, and not your current agency, team members, or other resources, own them.
 - Google Tag Manager (GTM)
 - Google Analytics 4
 - Google Search Console
 - Are there any other tracking or analytics requirements?
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Website Functional Requirements

- What CMS is your website built on?
 - Does the website allow for easy edits, new page creation, etc.?
 - Does the website and marketing need to communicate with any backend systems? If yes, list them.
 - Who in your organization should receive web form submissions and email notifications?
 - List all forms and matching form recipients.
 - Does the website need to send any emails to users?
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Technology

- Do you use a CRM? If yes, what platform?
 - Do you use Zapier?
 - Do you use any customer communication tools (chats, calendar scheduling, surveys, etc.)?
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Content Management

- Describe any current pain points or frustrations with your current content management system.
- Describe any current content creation efforts and their typical cadence.
- If the agency will be creating content, will they need to interview any subject matter experts for more technical topics?

Aztek's Website Checklist:

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Paid

- What paid efforts does your company participate in? List all that apply.
 - Do you have ads accounts created? If yes, list all that apply.
 - Consider how paid media will be managed and integrated with your marketing.
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SEO

- What SEO tools or services does your company currently use? Do you own and manage these instances?
 - Google My Business
 - MOZ Listings
 - How will SEO be managed and integrated with your marketing?
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Email

- What platform does your company currently use for email automation?
 - What email efforts does your company currently manage?
 - How will email be managed and integrated with your marketing?
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Social Media

- What social media does your company participate in? List all that apply.
- How will social media be managed and integrated with your marketing?



Data Security

- Does your marketing, communication, or website have any special security requirements beyond an SSL (Secure Sockets Layer) certificate?
 - Are you dealing with sensitive personal information that should be considered in the marketing process?
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Budget

- What is the budget for your marketing needs annually? Monthly?
 - Have you factored in external costs such as paid media?
 - If there is not adequate budget for the entirety of your needs, can services be phased in?
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Set Up Your Digital Marketing Agency Partnership for Success

Whether you're starting to look for potential agency partners or are ready to invest in your digital marketing efforts, our list should help you keep track of everything you need to bolster your online efforts with a new partnership.

Of course, a checklist can only go so far if you don't have any digital marketing agencies to evaluate. Good news – we just so happen to be good at digital marketing. Aztek partners with businesses to help them build a better, more comprehensive digital marketing program to support their goals. Ready to learn more? Reach out to us today to see if we're a good fit for you.