



Rate Your Marketing Partner Checklist

Use this checklist to evaluate your marketing partner. Check off each item that applies to your current marketing relationship, then tally your score to see how they measure up!

Transparent Plan and Goals

- You have clear, measurable goals, and your marketing partner takes responsibility for achieving them.
- Your marketing partner created a transparent marketing plan outlining monthly activities.

Strategy and Communication

- Your marketing partner consistently brings you new ideas, updated best practices, and fresh perspectives on your business.
- You are satisfied with the quality of leads you receive monthly.
- You understand the work being completed, the timelines, and the investment.

Campaign Setup

- Your marketing partner has developed an A-Client profile to identify your ideal clients and filter out less desirable ones.

Technical Aspects

- You own and/or have access to your assets (website, Google Ads, Google Analytics 4, Meta accounts, videos, photos, etc.).
- Your website includes clear calls to action on every page (e.g., “Request a Quote”).
- Your website is optimized for computers, mobile phones, and tablets.
- Facebook Pixel is installed on your website.
How to check: Go to your website homepage, right-click, and select “View Page Source.” Press Ctrl + F and search for 'Facebook Pixel.'
- Google Analytics/Tag Manager is installed on your website.
How to check: Go to your website homepage, right-click, and select “View Page Source.” Press Ctrl + F and search for: `_gaq.push`, `gtag('js'`, or `gtm.start`.

Leading Your Industry

- Your website and marketing material speak directly to your A-Clients' problems.
- Your website's contact forms ask qualifying questions, like estimated budget, to improve lead quality.
- Your email list is steadily growing.
- Your subscribers receive bi-monthly newsletters packed with value—not just sales pitches.
- Automated email marketing is used to nurture leads and engage current and past clients.
- Your social media accounts are updated weekly to keep your brand top-of-mind.

Company Review

- You consistently ask your clients for reviews about their experience with your business.
- Your Google Business Profile has at least 15 positive reviews in the last 12 months.
- You have a Glassdoor account with at least three reviews to attract high-quality team members.

Results and Reporting

- You receive a personalized monthly report summarizing campaign performance and progress toward your goals.
- You know your Cost-Per-Lead and Return on Investment based on your marketing partner's reporting.

Calculate your score!

0 – 11 You should give us a call!

12 – 16 Share this checklist with your marketing partner to discuss improvements.

17 – 22 You're rocking it!

Book a Discovery Call

