



Rate Your Marketing Partner Checklist

A Checklist to Evaluate
Your Marketing partner.



Transparent Plan & Goals

- You have clear goals, and your marketing partner is accountable for results.
- There's a transparent monthly plan outlining all activities.

Strategy & Communication

- You're happy with the quality of leads each month.
- You know what's being done, when, and what it costs.
- Your marketing partner brings fresh ideas and proven strategies regularly.

Campaign Setup

- Your marketing partner built an A-Client profile to identify ideal clients.

Technical Aspects

- Your website includes clear calls to action on every page (e.g., “Request a Quote”).
- You own OR have access to all assets including your website, ads, analytics, etc.
- Your website is optimized for computers, mobile phones, and tablets.
- Google Analytics/Tag Manager is installed on your website.
How to check: Check: `Ctrl+F` and search `_gaq.push`, `gtag('js')`, or `gtm.start`.
- Facebook Pixel is installed on your website.
How to Check: Right-click homepage → “View Page Source” → `Ctrl+F` → search Facebook Pixel.

Results and Reporting

- You get a monthly report with campaign performance and goal progress.
- You know your Cost-Per-Lead and ROI from your marketing partner's reports.

Leading Your Industry

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

Company Review

- You regularly ask clients for reviews.
- You have a Glassdoor account with at least 3 reviews to attract quality hires.
- Your Google Profile has 15+ positive reviews in the past year.

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!

Need a Boost?

If your checklist score was lower, or you just want to explore better options, try our Sales and Lead Tracking System free for the first three months, no strings attached.

See where your marketing dollars are going and optimize your efforts.

Ready to get started? [Click to Book a Call](#)