

THE AGENCY AUDIT CHECKLIST

Eight questions that separate a strategic partner from a reporting vendor. Bring them to your next Quarterly Business Review to test how well the agency understands the business.

WHAT BUSINESS GOAL ARE WE ACTUALLY TRYING TO IMPROVE?

Look for qualified leads, booked appointments, retention, market expansion, or revenue quality — not vague awareness language.

LISTEN FOR

A clear link between marketing activity, company priorities, and the decision it should influence.

WHICH METRICS SHOULD LEADERSHIP CARE ABOUT MOST — AND WHY?

The scorecard may include pipeline, bookings, CAC, margin, LTV, repeat visits, or lead quality depending on the business model.

LISTEN FOR

Metrics connected to leadership decisions, not the easiest dashboard export.

WHAT HAVE WE LEARNED THAT SHOULD CHANGE WHAT WE DO NEXT?

Push beyond last-month reporting. Ask what the agency has learned about customers, channels, competitors, offers, and timing.

LISTEN FOR

Specific recommendations with rationale, tradeoffs, and the next action they would stop, start, test, or fund.

WHICH INVESTMENTS ARE PERFORMING BEST — AND WHICH ARE NOT?

Ask where they would increase, reduce, pause, or test spend. Every budget should have a point of view.

LISTEN FOR

Honest performance evaluation, not a reflexive defense of every tactic or budget line already in flight.

WHAT HAPPENS AFTER MARKETING GENERATES A LEAD?

Reporting should connect to CRM, sales feedback, revenue data, or customer behavior. Volume alone can hide poor fit.

LISTEN FOR

Attention to lead quality, sales follow-up, and downstream conversion signals from the revenue team.

WHAT ARE WE NOT MEASURING THAT WE SHOULD BE?

Phone calls, offline sales, referrals, trade shows, repeat purchases, and reputation can all create attribution blind spots.

LISTEN FOR

A realistic view of attribution gaps, measurement limits, and next-best tracking fixes we can put in place.

WHAT DO YOU NEED FROM US TO PRODUCE BETTER RESULTS?

The answer may be sales feedback, product detail, faster approvals, cleaner access, or stronger internal ownership.

LISTEN FOR

A concrete operating request with named owners, timing, and the internal inputs the agency needs from us.

IF THIS WERE YOUR BUDGET, WHAT WOULD YOU CHANGE?

Would they shift channels, fix the website first, change creative, improve tracking, or stop something entirely?

LISTEN FOR

Willingness to challenge the plan when new evidence supports a smarter path forward.