

## EVALUATION KIT

# THE ULTIMATE MANAGED SERVICE PROVIDER EVALUATION KIT

Finding the perfect partner to help you achieve greater success in marketing is no easy task. But once you know the right questions to ask, it gets a lot easier.

This DemandLab kit will help you evaluate potential marketing automation partners and identify the best choice for you and your organization.

## Choosing your partner

As marketers, one of the most important things we can do is to marshal our resources effectively. There isn't a single marketing professional who isn't challenged by competing priorities or frustrated because the resources needed to seize a great opportunity just weren't there.

Projects pile up, budget is limited, time is scarce and your team becomes overwhelmed. These are non-negotiable realities. But how do you make sure you're putting your reputation, goals, and revenue potential in the right hands?

Choosing the right marketing automation partner is a big step and one size never fits all when it comes to managed services. Your organization is unlike any other, and your needs and priorities are unique. Your company may be large or small. Your market may be local or global. Your in-house design capabilities may be robust or nonexistent. And your experience with marketing automation may be extensive or minimal.

Wherever your priorities lie, the greatest value comes from a long-term partnership. Just like any relationship, the ones that go the distance will

always outshine the short-term "flings." Depending on your objectives, managed services can free you and your team to focus on areas of strength, or it can provide an opportunity to enhance your knowledge, explore new disciplines, and acquire new skill sets.



## HOW TO USE THIS KIT

### Step 1

Review the complete list of questions below, which are grouped according to different themes ("Values," "Strategic Capability," etc.). For each theme, use the "My Critical Need" column to check off the items that are most important to you. Then, add a checkmark or an 'X' to track each agency's ability to deliver in the most important areas.

### Step 2

When you've evaluated your critical needs and each agency's capabilities, add up the number of check marks in each column. The agency with the score closest to your total Critical Needs score will be the agency that aligns most with your needs.

And once you've built a level of trust and understanding with your managed service partner, they become a seamless part of your process, a reliable resource, and an integral part of your success.

So, don't look for the organization that has the most capabilities or "checks the most boxes." Instead, find the one that checks the boxes that are most important to you.

	My Critical Needs	Agency 1	Agency 2	Agency 3
<div style="display: flex; align-items: center;">  <div style="background-color: #2e7d72; color: white; padding: 5px 10px; border-radius: 5px;"> <h2 style="margin: 0;">Values</h2> </div> </div>				
Does the agency have a mission, vision, and values statement in place? Do they align with those of your organization?				
Does the agency give back to the community in any way?				
<div style="display: flex; align-items: center;">  <div style="background-color: #2e7d72; color: white; padding: 5px 10px; border-radius: 5px;"> <h2 style="margin: 0;">Strategic Capability</h2> </div> </div>				
During the evaluation process, does the agency ask you about your goals, challenges, market, competitors, etc.?				
Does the agency have a discovery process in place to help them understand each client's business and marketing goals?				
Can the agency describe client engagements in which they led or contributed to an overarching strategy?				
Can the agency demonstrate an ability to support strategy, refine goals, or sharpen the vision for your marketing team?				
<div style="display: flex; align-items: center;">  <div style="background-color: #2e7d72; color: white; padding: 5px 10px; border-radius: 5px;"> <h2 style="margin: 0;">Proof Points and Credentials</h2> </div> </div>				
Does the agency have testimonials and case studies available on their website? Are the featured clients reputable and recognizable?				
Can the agency provide client references upon request?				
Can the agency provide their client churn rate and retention rate for their managed service clients upon request?				

	My Critical Needs	Agency 1	Agency 2	Agency 3
<b>Proof Points and Credentials cont.</b>				
Has the agency won any industry awards in relevant areas? (Markies, Revvies, Effies, CMAs)				
Do the agency leaders speak or participate at industry events?				



## Service Levels

Can you discuss/identify which members of the agency's team will be working with you? (Other points of interest: How were they chosen, and what skills/experience do they bring?)

If you require a local presence and support for your team, can the agency commit to being on site as often as you need?

Does the agency have experience managing multiple stakeholders who contribute to your marketing efforts?

Does the agency have the bandwidth to service the projects in your pipeline in terms of people-hours and other resources?

What kind of turnaround time can they promise for various projects and deliverables?



## Project Management

What does the agency's project management process look like?

Does the agency use a project management platform to keep projects organized and on track?

Are they able and willing to work with your existing processes and platforms?

Is the agency able to illustrate their team make-up in a way that makes you feel comfortable with your engagement and confident in results?

How frequently will your team meet with their team to set goals, evaluate progress, and adjust strategy?

	<b>My Critical Needs</b>	<b>Agency 1</b>	<b>Agency 2</b>	<b>Agency 3</b>
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**Project Management *cont.***

Does the agency have quality-assurance processes and platforms in place, such as proofing and testing?				
Will the agency assign you a dedicated project manager to shepherd projects to completion?				
Will they provide a point person who provides continuity and takes ultimate responsibility for project outcomes?				



**Service Breadth**

Does the team include integration specialists who can connect marketing automation with CRMs, analytics, BI, social, etc.?				
Does the team include content strategists who can conduct content audits and develop content strategies?				
Does the team include copywriters and designers who can refresh existing content or ideate and develop new content?				
Does the team include videographers, programmers, and print professionals who can create rich media, interactive, and print content?				
Does the agency maintain partnerships with other vendors or agencies that extend their capabilities in any other areas?				

Can the agency coordinate their services with PR companies, market research companies, and other partners you work with?				
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**Knowledge Enhancement**

Do agency employees stay up to date on the most current practices and technologies with annual conferences, workshops, or training?				
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	My Critical Needs	Agency 1	Agency 2	Agency 3
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## Knowledge Transfer

Does the agency have a process for transferring knowledge and expertise to you and your team over time?

Can the agency connect you to a client who will provide a reference for the training or knowledge transfer process?



## For Global Organizations

Does the agency have experience working with a geographically dispersed team?

If you manage remote teams, does the agency team include someone proficient in the team's native language?

Does the agency have experience delivering global and multilingual marketing campaigns?

Does the agency have experience working with culturally diverse teams?

Does the agency have experience working across different time zones?



## For Organizations that are New to Marketing Automation

Does the agency have experience in helping clients choose the right marketing automation platform?

Can the agency configure an out-of-the-box marketing automation platform to fit your unique requirements?

Can the agency onboard and train your team so you can acquire the expertise to manage your own campaigns?

<b>TOTAL SCORE</b>				
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## Evaluating your partner

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Choosing a managed service partner is not a step to take lightly. In fact, it's the ultimate trust exercise for marketers. Remember, you'll work side by side with your partner for a long time. So, look for the agency that delivers the capabilities you're looking for AND that you feel you'll enjoy working with.

To learn more about leveraging managed services effectively, read "[Call for Backup!: Can Managed Services Save Your Marketing Team?](#)"



DemandLab is a technology-focused marketing consultancy that accelerates revenue for its clients through customized Revenue Ecosystem™ solutions.

P 267.297.2192

E [contact@demandlab.com](mailto:contact@demandlab.com)

[www.demandlab.com](http://www.demandlab.com)

