**Agency Hiring Checklist**

1. **\_\_\_\_\_ Access Your Scheduler Template** [[access it here](https://docs.google.com/spreadsheets/d/1fwL-7UOlfrNdMojQZUl7suZqnyOm6p3UMGxw38whPl8/edit#gid=0)]  
   *Why? The template helps you plan accordingly, which is a good thing. Don’t worry about filling it all in now. When the time is right, plan your work and work your plan!*
2. **\_\_\_\_\_ Take Your Self Assessment** [[access it here](https://docs.google.com/document/d/1pU7s9VJjSr3U6v5PiU4lgSmOCgPCrlo-KIFKKTghgPg/edit)]  
   *Why? It’s a great way to get everyone involved in the process. That way you’re all on the same page when it comes to goals, priorities, roles and functions. You know, the important stuff.*
3. **\_\_\_\_\_ Create Your Agency Vision** [sample vision in guide on p. 7]  
   *Why? This gets the team aligned on purpose, lets everyone see what success really looks like and sets the tone on the kind of agency you want to work with.*
4. **\_\_\_\_\_ Fill in Your Agency Roadmap Questionnaire** [[access it here](https://docs.google.com/document/d/1meyKTvDeMVfUcf5xJAA1qi4QQYPawzwY9crxuRXI25o/edit)]  
   *Why? So you can figure out the most important options and preferences. This, along with your Self Assessment, will come in handy when you’re putting together your RFI & RFP docs.*
5. **\_\_\_\_\_ Have a Roadmap Check-in Meeting** [sample agenda in guide on p. 10]  
   *Why? You’re headed down the path of no return now! Make sure everyone is on the same page and can vocalize concerns and make adjustments they need to.*
6. **\_\_\_\_\_ Create Your Agency Shortlist** [access [agency shortlist template](https://docs.google.com/spreadsheets/d/1FSZEAfBX0jjQ5iIPKS7aYEP1mXryJoNwxUxardGaJ-Q/edit#gid=0)]  
   *Why? Figure out each agency’s perceived strengths and weaknesses. Then use them to narrow down your candidates to a manageable number.*
7. **\_\_\_\_\_ Customize Your RFI and/or RFP** [access [RFI template](https://docs.google.com/document/d/1LGovpYS6lQuSosyXhrUALnYiUfNdNYaW7ng75Zym5Vo/edit) & [RFP template](https://docs.google.com/document/d/1zcypla2RQ3axVvbc9R28kVqM4hAgLdgs15fCbOsWYBM/edit)]  
   *Why? This is how you will solicit your agency candidates. Each one will help them respond using a selection criteria that helps you make the right decisions.*
8. **\_\_\_\_\_ Send RFIs & Evaluate Responses to Determine RFP Finalists***Note:* *You can skip this if you’re not using a RFI as part of your process.*
9. **\_\_\_\_\_ Send RFP to Finalists, Complete Initial Q&A, Schedule Presentations**
10. **\_\_\_\_\_ Use the Agency Selection Scoresheet** [final form to [access here](https://docs.google.com/spreadsheets/d/1YlqgvWDGOM6kUHegodpDCNFBOepDcJ3kCvtaQ6IkYGY/edit#gid=331007810)]*Why? It’s an easy way to organize, score and evaluate agency responses.*
11. **\_\_\_\_\_ Communicate to Your Winning Agency and Notify Those Not Picked**
12. **\_\_\_\_\_ Negotiate Terms and Ink Your Agreement**