**Roadmap Questionnaire**

1. **Which are you more attracted to, and why: a Full Service or Specialty Agency?**  
     
   ***Understanding the Difference***:  
   A “full service” agency can have a fairly wide range of definitions with respect to expertise and capabilities (TV Advertising, Radio, Print, Digital, Social, Live Events, Public Relations, etc.).   
     
   While full service agencies may legitimately claim expertise across multiple marketing disciplines, the common expectation with “specialty agencies” is greater capabilities and expertise within (and due to) a more narrow focus of services.   
     
   ***Points to Consider***:  
   a.) **The capabilities match**: you may wish to consider a qualified agency candidate as one that’s service portfolio is equivalent to at least 50% of the requirements you have. In other words, consider how much of an agency’s total time is spent fulfilling requirements similar to yours.  
     
   b.) **The value factor**: as an example, you may have a very specific scope of work that includes video production. You might be interested in somebody you believe brings more value because that’s their only focus. Alternatively, you might see more value in one that produces video, creates video ads and integrates promotions across multiple marketing channels.   
     
   c.) **The big picture**: we’ve seen trends alternate between companies who have a preference on working with multiple, specialty agencies - or fewer (even one) full service agency. It’s good to orient your own preference on this, even if it changes over time. On that note, you’ll want to work with an agency who can demonstrate or confidently discuss how they’ve played nice with others.
2. **Which might you consider more valuable, and why: A marketing agency with vertical (industry-specific) expertise, or one who has experience in multiple industries?**  
     
   ***Understanding the Difference***:  
   A vertical marketing agency will typically bring a greater range of experience and expertise to the particular industry (or few industries) it serves. The focus affords the agency more time and incentive to dig into industry trends, audience and perspective.  
     
   Although a “generalist” agency will frequently have some industry specialization, it’s more focused on marketing trends that can be applied across a broad spectrum of businesses (which may include B2B and B2C).  
     
   ***Points to Consider***:  
   a.) **The content match**: industry-specific agencies are typically in a better position to review or create content that is more akin to thought leadership. They’ll frequently have a better handle on industry vernacular, trends and influencers.   
     
   While generalists often require the aid of a subject matter expert (an outside influencer or one from the client side) to create content, they may bring a broader perspective on how created content can be applied.  
     
   b.) **The advantage factor**: an old saying among consultancies is, “if you’re serving two clients in the same industry, it’s a conflict of interest. If you’re serving three or more, you’re a subject matter expert.”   
     
   There’s merit to each point of view. One might argue generalists either come to the table with a greater propensity for new ideas driven from a broader range of experience (and fewer industry clients) -- or they come with ideas that are riskier due to their comparative lack of industry knowledge.   
     
   On the other hand, while a vertical agency has more exposure to what works in the industry they serve -- the dichotomy is either on-target ideas more likely to work, or more ideas that continue to be recycled among others in the industry.   
     
   c.) **The big picture**: we’ve seen companies who work so well with vertical agencies, they end up hiring those agency’s employees (sometimes to the demise of the agency). We’ve also seen companies preferring to embrace a mindset of lessons learned and applied from radically different industry practices (B2C ecommerce practices applied to B2B lead generation efforts, for example).   
     
   We’d recommend you first consider who you have from an internal, subject matter expert or hired influencer perspective. What would the difference be in how those subject matter experts or influencers work with   
   i.) an agency that has a vast amount of industry experience?  
   ii.) an agency that has no or relatively little industry experience?   
     
   How challenging will it be for a generalist agency to come up to speed on your industry? How challenging will it be for a vertical agency to adopt a new or fresh perspective that might help set you further apart?
3. **Do you feel better about the idea of working with a boutique agency, or one that’s part of a larger conglomerate or holding company?**  
     
   ***Understanding the Difference***:  
   What boutique agencies can offer in terms of personalized or bespoke service levels may contrast to what they lack in scalability and systems (people, infrastructure and resources) compared to larger agencies.  
     
   While boutique agencies are more likely to stretch for the time and talent it takes to satisfy certain requirements, they may also be less conventional with respect to defined parameters around scope and process.   
     
   You might translate this into a looser, more relational arrangement as opposed to a more contractual and transactional one. Although boutique agencies often have fewer clients, you typically don’t want to be one who’s accounting for more than 50% of their total revenue.  
     
   Larger agencies, even boutique agencies owned by larger ones, are ultimately beholden to their investors and the systems put in place to protect their interests. This mitigates a range of risks for both client and agency.   
     
   A common expectation is more opportunity to leverage resources as needed, but potentially less to innovate beyond established practices. Although larger agencies usually have larger clients, you’ll want to get a true pulse on this to avoid being the small fish.  
     
   ***Points to Consider***:  
   a.) **The leadership match**: the consideration here relates simply to the level of access and satisfaction you believe you’ll have with any given agency leader with which you interact.   
     
   For some, it’s important to be able to look a founder or chief executive in the eye. You may want the most senior leadership to know who you are, what you expect, your purposes, concerns and circumstances.  
     
   Others couldn’t care less, and are far more concerned with the day-to-day contacts leading their agency account team. The people within any agency are often a reflection on the leadership. If they are good, and you are satisfied - then access to the top dog may not mean much.   
     
   b.) **The creative factor**: “creative” in this context goes beyond visual aesthetics - but on that note, be aware the best creative directors and designers float in and out of small and large agencies alike. Bigger work doesn’t equal better work.  
     
   Since much of what you’ll judge will be based on what you see, high-quality visual content should be little more than table stakes for getting your attention. Understanding how the agency arrived at their output is where you’re due diligence matters.  
     
   That means getting a good feel for an agency’s creative process and philosophy. Examples of insights you may wish to uncover include the following:  
     
    - Balance of Collaboration: between internal agency and client resources  
    - Authenticity of Process: just a neat story, or something actually followed?  
    - Range of Variables: example - how is data included as part of creative?   
     
   c.) **The big picture**: this is a people business, so the quality of relationships are at the core of a partnership that accelerates, slows or gets stuck in neutral.   
     
   As Robb High, one of the world’s leading experts on coaching agencies (closing and brokering over $1B in business through a “Mad Men” career that began more than half a century ago), will tell you - “it’s all about courtship.”   
     
   Your approach to agency selection should be like dating. You’re picking up subtle (and not so subtle) cues along the way, instinctually driving your decisions -- ideally, on a series of more “dates” before you actually propose.  
     
   This is not to discount the relation to, or importance of capabilities, work, experience, reputation and capacity. Rather, it’s a reminder that likeability and trust are the leading elements you’ll first secure with the agency of your choosing -- so it’s imperative your process facilitates space and time for dating.

**Notes**

Use this area for additional notes, understanding answers and noted preferences to this questionnaire will come in handy during the actual selection process