

• FREE SCORECARD · 2026 EDITION

Agency Evaluation Scorecard

A structured framework to objectively evaluate agencies across 8 key dimensions, spot red flags early, and negotiate stronger contracts.

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1000+

DATA CONNECTORS

90 hrs

SAVED / WEEK

99.9%

DATA ACCURACY

~5 min

READ TIME

Agency Scoring Template

Score each dimension 1 to 5, then multiply by the weight to get a weighted score. Compare totals across agencies.

#	DIMENSION	WHAT TO EVALUATE	WEIGHT	SCORE (1 – 5)	WEIGHTED SCORE
1	Strategy	Goal alignment, market understanding, roadmap clarity	×3		
2	Execution	Campaign quality, timelines, creative output	×3		
3	Reporting	Data granularity, frequency, actionable insights	×3		
4	Transparency	Fee breakdown, media spend visibility, proactive comms	×2		
5	Tech Stack	Tools used, integration capabilities, automation level	×2		
6	Industry Expertise	Vertical knowledge, case studies, relevant clients	×2		
7	Pricing	Value for money, pricing structure, hidden fees	×1		
8	References	Client testimonials, retention rate, case results	×1		
Total Weighted Score				/85	

Scoring Guide

5 = Exceptional, best-in-class • **4** = Strong, exceeds expectations • **3** = Meets expectations
2 = Below expectations, needs improvement • **1** = Unacceptable, major concerns

Scores above **65/85** indicate a strong fit. Below **45/85** signals significant risk. Use one scorecard per agency and compare side by side.

Red Flags to Watch For

⚠️ **No access to ad accounts** — agency controls all logins and won't share credentials

⚠️ **Vague reporting metrics** — reports focus on vanity metrics, not business outcomes

⚠️ **Long lock-in contracts** — 12+ month terms with steep early termination penalties

⚠️ **Opaque fee structure** — hidden markups on media spend or undisclosed commissions

⚠️ **One-size-fits-all strategy** — no customization for your industry or business model

⚠️ **High team turnover** — your point of contact changes repeatedly in first months

⚠️ **No proactive communication** — you always have to chase for updates and results

⚠️ **Reluctance to share data** — resists exporting raw data or integrating with your tools

⚠️ **Unwilling to share raw data** — refuses to grant you direct platform access or raw data exports

⚠️ **No dedicated account manager** — no single point of contact assigned; you deal with a rotating cast

⚠️ **Cookie-cutter strategy** — generic playbook that ignores your brief, audience, and business goals

⚠️ **Resists performance-based terms** — pushes back on compensation clauses tied to measurable results

Contract Essentials Checklist

- 1 **Data Ownership** — All campaign data, creative assets, and audience lists remain your property upon contract end.
- 2 **Performance Clauses** — Define measurable KPIs with clear benchmarks. Include remediation steps if targets are missed.
- 3 **Termination Terms** — 30-day notice with no penalty after initial period. Avoid auto-renewal traps.
- 4 **Reporting Cadence** — Weekly performance reports with raw data access. Monthly strategy reviews with full transparency.
- 5 **IP Rights** — All creative work produced is yours. Agency retains no usage rights after contract ends.

90-Day Onboarding Timeline

Set your new agency up for success with this milestone-driven plan.



Phase 1 — Days 1–30

Foundation

- Kick-off meeting + brand immersion session
- Share brand guidelines, tone of voice, asset library
- Define KPIs, reporting format, and review cadence
- Set up shared tools: project management, analytics access, creative brief templates
- First deliverable: audit of current state + 90-day plan

Phase 2 — Days 31–60

Execution

- Launch first campaigns per agreed strategy
- Weekly check-ins: 30-min standup on metrics + blockers
- First monthly performance review
- Creative refresh based on early data
- Refine audience targeting and budget allocation

Phase 3 — Days 61–90

Optimization

- Full performance review vs. original KPIs
- Identify top 3 wins and top 3 improvement areas
- Agree on next quarter's strategy and budget
- Formalize reporting cadence (weekly/monthly/quarterly)
- Decision point: scale, adjust, or flag concerns

Pro Tip

Share this timeline with your agency during the kick-off. Alignment on milestones from day one reduces miscommunication and sets clear expectations for both sides.

Get Unified Reporting Across All Your Agencies

Stop relying on agency-provided reports. Pull data directly from 1000+ platforms into a single source of truth.

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