

• FREE TEMPLATE · 2026 EDITION

Agency Partnership Health Check

Quarterly review template with benchmarks for enterprise brands managing agency relationships.

TRUSTED BY ENTERPRISE MARKETING TEAMS AT

Activision · ASUS · SoftwareOne · Booyah Advertising · Nasdaq

1000+

DATA CONNECTORS

90 hrs

SAVED / WEEK

99.9%

DATA ACCURACY

~5 min

READ TIME

QBR Template

Use this framework each quarter to structure agency performance conversations around data, not opinions.

EXECUTIVE SUMMARY

KEY OBJECTIVE THIS QUARTER

OVERALL PERFORMANCE RATING (1-10)

RECOMMENDED ACTION

PERFORMANCE VS GOALS

KPI	PLAN	ACTUAL	VARIANCE
Cost per Acquisition	—	—	—
ROAS	—	—	—
Lead Volume	—	—	—
Conversion Rate	—	—	—
Brand Awareness Lift	—	—	—
Budget Utilization	—	—	—

KEY WINS

AREAS FOR IMPROVEMENT

Benchmark Scorecard

Compare your agency against industry benchmarks. A gap of 20%+ in any metric warrants a dedicated improvement plan.

METRIC	DESCRIPTION	BENCHMARK	YOUR AGENCY	GAP
Response Time	Avg. time to first reply on requests	≤ 4 hrs	—	□
Brief Turnaround	Brief received to first draft delivery	≤ 5 days	—	□
Quality Score	% of deliverables approved on first round	≥ 80%	—	□
Strategic Input	Proactive strategy ideas per quarter	≥ 3	—	□
Proactive Recs	Data-backed recommendations shared unsolicited	≥ 2 / mo	—	□
Budget Accuracy	Actual spend vs. approved budget variance	≤ 5%	—	□
Reporting Timeliness	% of reports delivered on or before deadline	≥ 95%	—	□
Team Stability	Key personnel turnover on your account per year	≤ 1	—	□

PRO TIP

Automate benchmark tracking by connecting agency reporting tools to Improvado. Real-time dashboards replace quarterly guesswork with continuous visibility.

Satisfaction Survey

Distribute to 3-5 internal stakeholders who interact with the agency. Average scores per category to identify systemic strengths and gaps.

COMMUNICATION

QUESTION	1	2	3	4	5
Agency responds promptly to requests	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Status updates are clear and regular	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agency escalates issues proactively	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Meetings are well-prepared and productive	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feedback is incorporated effectively	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

DELIVERABLES

QUESTION	1	2	3	4	5
Work is delivered on time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality meets or exceeds expectations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Deliverables align with the brief	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Revisions are handled quickly	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reporting is accurate and actionable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

STRATEGIC VALUE

QUESTION	1	2	3	4	5
Agency understands our business goals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Proactive ideas and recommendations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Brings industry trends and insights	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Challenges our assumptions constructively	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Partnership drives measurable business results	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

NET AGENCY PROMOTER SCORE

"How likely are you to recommend this agency to a peer?" (0-10)

___ /10

Renewal Decision Framework

Total your scores from the survey (max 75) and benchmarks to determine the right path forward for your agency relationship.

DECISION MATRIX

> 80

Auto-Renew

Agency is a strategic partner. Proceed with contract renewal and explore expanding scope or responsibilities.

60 – 80

Renegotiate

Solid foundation with notable gaps. Build a 90-day improvement plan with clear milestones before renewing.

< 60

Issue RFP

Fundamental misalignment. Begin a competitive review process while maintaining current operations during transition.

YOUR TOTAL SCORE

Sum of all 15 survey questions (max 75) + benchmark adjustments

___ /100

CONTRACT REVIEW CHECKLIST

✓	ITEM	NOTES
<input type="checkbox"/>	Scope of work matches current needs and next-quarter plans	
<input type="checkbox"/>	Fee structure aligns with delivered value and market rates	
<input type="checkbox"/>	SLAs and KPIs are clearly defined with consequences for misses	
<input type="checkbox"/>	Data ownership and reporting access rights are documented	
<input type="checkbox"/>	Termination clause allows exit with ≤ 90-day notice	

PRO TIP

Centralize agency performance data in Improvado to track trends over time. Quarterly snapshots become powerful when you can compare year-over-year patterns across every agency relationship.

See How Improvado Unifies Marketing Data Across 1000+ Connectors

Stop toggling between platforms. Get every channel, campaign, and creative in one place — ready for analysis in minutes, not weeks.

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