

Agency Vetting Checklist

Picking the right agency partner is like choosing a superhero for your project – the right one can skyrocket your success to the stratosphere!

This checklist isn't just a list; it's your secret decoder ring, helping you unravel the mystery of agency selection. Remember, while counting pennies is great, the real jackpot lies in the dazzling value that a top-notch agency brings. So, don't just go for the bargain bin – aim for the stars! After all, in the grand story of your business, you want an agency that's more blockbuster hit than direct-to-video

Understand Your Needs

- Define your primary goals for the website redesign and digital presence (e.g., increase traffic, improve user experience, drive more leads, better tell your story, have a fast site, etc.).
- Identify key pages, features, and functionalities you want in your new website.
- Identify websites that you like and don't like within and outside of your industry.
- Do you want a custom site, or will a templated site that may look like many other websites be okay for your business? (no judgment here; while Bonsai only builds custom, we understand that templated may work just fine for businesses whose website is a large business driver).
- What integration points does your website have (e.g., ERP, PIM, CRM, Marketing Automation, CC processing, etc.).
- Set a tentative budget for the project.

Initial Agency Research/Shortlist

- Research potential agencies online (Google, Clutch, DesignRush, etc.)



- Review each agency's portfolio for relevant experience and quality of work.
- Read client testimonials and online reviews.

Requesting Proposals

- Prepare a brief that outlines your project requirements.
- Request proposals from selected agencies.
- Review proposals for alignment with your needs and budget.

Deep Dive into Agency Credentials

- Evaluate detailed case studies from the agencies.
- Visit websites built by each agency and evaluate their effectiveness (how fast, how persuasive, do they appear in search results? etc.)
- Assess agencies' technical skills and strategic expertise.
- Check the scalability and future-proofing aspects of their solutions.

Client References and Reviews

- Contact former clients for direct feedback
- Analyze online reviews from credible places, like Clutch.co, for additional insights.

Interviews and Meetings

- Schedule meetings or calls with the agencies.



- Discuss their approach to project management and client communication.
- Ensure they have a clear understanding of your goals and needs.

Cultural Fit and Collaboration

- Assess if the agency's culture and values align with yours. ← this is important! You'll work with these people for at least 4-6 months and potentially a lot longer if they maintain and support your site. Are they people you'd go to happy hour with?
- Consider the ease of communication and collaboration. ← Also very important. How responsive are they? How easy are they to work with?

Cost versus Value Analysis

- Compare detailed cost breakdowns from each agency. What are you getting (pages, templates, widgets, warranties, guarantees, etc., vs. the cost)? Below is an example of a table you could construct.

Agency Name	Cost Breakdown	Custom or Templated	Pages / Templates / Widgets	Widgets / Features	Copywriting included?	Warranties/ Guarantees	Additional Services
Agency A	[Cost details]	[Custom/ Templated]	[e.g., 10 pages]	[List of widgets / features]	[Yes/No]	[Warranty details]	[e.g., SEO services]
Agency B	[Cost details]	[Custom/ Templated]	[e.g., 15 pages]	[List of widgets / features]	[List of widgets]	[Warranty details]	[e.g., Content creation]
Agency C	[Cost details]	[Custom/ Templated]	[e.g., 8 pages]	[List of widgets / features]	[List of widgets]	[Warranty details]	[e.g., Analytics setup]



- Evaluate the potential return on investment (ROI) from their proposed solutions. Which agencies guarantee an increase in search traffic or conversion rates or any other metrics that are important to you? What would a 5% loss of SEO traffic vs a 20% increase in SEO traffic mean to your business? What would a 5% increase in conversion rates vs a 20% increase in conversion rate mean to your business? Where do you think each Agency would fall?
- Consider long-term costs (e.g., maintenance, updates).

Decision Time

- Narrow down to the top choices.
- Discuss any final concerns or clarifications.
- Make an informed decision based on thorough evaluation.

Post-Selection

- Finalize the contract with clear terms and deliverables.
- Establish a timeline and milestones for the project.
- Set regular check-ins and updates.

And there you have it – your trusty compass in the often bewildering world of picking the perfect agency. Think of this checklist as your secret weapon, ensuring you don't miss a beat (or a tweet) while on your quest for digital greatness. Choose wisely, and you won't just be signing a contract; you'll be embarking on an epic adventure with a partner who gets your brand, boosts your online mojo, and maybe, just maybe,





shares your love for coffee (or tea). So gear up, set your sights high, and let the agency-choosing games begin!



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