

Decision Pack

A practical four-part worksheet for comparing agencies on proof, ownership, economics, and working fit. Use it during discovery calls, then keep the completed copy with the contract.

The rule that overrides the score

Reject an agency that insists on owning a core account, fabricates a material claim, blocks data or file export, or refuses to identify the people doing the work. A high total can't repair a failed hard gate.

1	Define	Complete the one-page buying brief before requesting proposals. Give each agency the same problem, baseline, target, and constraints.
2	Verify	Score evidence you can inspect, not the confidence of the pitch. Keep screenshots, reference notes, and contract language beside the score.
3	Compare	Use the same 0-2 standard for every finalist. Resolve every 1 before signing. Treat a 0 on a hard gate as a rejection.
4	Start reversibly	Prefer a paid, tightly scoped first engagement that produces a baseline, one useful execution slice, and assets your company keeps.

Prepared by Gaurav Tiwari | Companion to How to Choose a Digital Marketing Agency

1. Build the buying brief

Define the problem before a seller defines it for you. Use sourced numbers and name the internal owner who can unblock the work.

Field	What belongs here	Your answer
Business outcome	What should change in revenue, qualified pipeline, retention, contribution, or another business result?	
Current baseline	State the number, date range, and source system. Example: qualified demos per month from GA4 plus the CRM.	
Target and guardrail	State the desired threshold and the cost, quality, margin, or capacity limit that must not be crossed.	
Time window	Separate launch deadlines from the period needed to judge the channel or campaign.	
Unit economics	Record average order value, gross contribution, lead-to-sale rate, CAC, and LTV where they apply.	
Constraints	List approval delays, engineering limits, regulated claims, geography, inventory, sales capacity, and media budget.	
Internal owner	Name one person who can grant access, make decisions, and keep client-side dependencies moving.	

Scope sentence

We need [specialty] to improve [business outcome] from [baseline] toward [target] within [window], without exceeding [guardrail].

2. Score three agencies against the same evidence

Score 0 for missing, contradicted, or refused; 1 for plausible but incomplete; 2 for specific, documented, relevant, and independently checkable.

Area	Test	What earns 2 points	Agency A	Agency B	Agency C
Proof	1. Goal diagnosis	Names the bottleneck, baseline, business outcome, and a channel it wouldn't prioritize.	0 / 1 / 2	0 / 1 / 2	0 / 1 / 2
Proof	2. Case-study arithmetic	Shows baseline, dates, denominator, conversion definition, controlled changes, and confounders.	0 / 1 / 2	0 / 1 / 2	0 / 1 / 2
Proof	3. References	Provides a relevant current and former client you can contact.	0 / 1 / 2	0 / 1 / 2	0 / 1 / 2
Ownership	4. Accounts and data	Keeps domain, GA4, Search Console, Ads, Meta, CRM, lists, and audiences under client control.	0 / 1 / 2	0 / 1 / 2	0 / 1 / 2
Ownership	5. Delivery team	Names the actual team, seniority, responsibility, location, employment status, and capacity.	0 / 1 / 2	0 / 1 / 2	0 / 1 / 2
Ownership	6. Portability and exit	Contract defines editable files, exports, licenses, access removal, and delivery timing.	0 / 1 / 2	0 / 1 / 2	0 / 1 / 2
Economics	7. Cost transparency	Separates fees, media, software, production, pass-through costs, taxes, and overages.	0 / 1 / 2	0 / 1 / 2	0 / 1 / 2
Economics	8. Measurement plan	Ties channel metrics to qualified pipeline, CAC, contribution, or another business result.	0 / 1 / 2	0 / 1 / 2	0 / 1 / 2
Economics	9. Scope clarity	Defines deliverables, cadence, revisions, client dependencies, and exclusions.	0 / 1 / 2	0 / 1 / 2	0 / 1 / 2
Working fit	10. Discovery quality	Asks hard questions, challenges a weak assumption, and doesn't prescribe before diagnosis.	0 / 1 / 2	0 / 1 / 2	0 / 1 / 2
Working fit	11. Reporting quality	Provides raw-data access plus decisions, experiments, failures, and next actions.	0 / 1 / 2	0 / 1 / 2	0 / 1 / 2
Working fit	12. Reversible start	Offers a paid, tightly scoped first engagement with useful standalone deliverables.	0 / 1 / 2	0 / 1 / 2	0 / 1 / 2
	TOTAL	20-24 finalist 15-19 unresolved 0-14 reject	___ / 24	___ / 24	___ / 24
	HARD GATE	Pass only if ownership, truthfulness, export, and named-team conditions all pass.	PASS / FAIL	PASS / FAIL	PASS / FAIL

3. Run the reference call like an audit

Ask one current client and one former client with similar scope. Record what they can confirm in their own accounts, not only how they felt about the relationship.

Question	Current client notes	Former client notes
Who sold the engagement, and who actually delivered it?		
What missed a deadline, and how did the agency respond?		
Which reported result could you confirm in your own account?		
What extra costs appeared after the original quote?		
How quickly did you receive data, files, and access at the end?		
Would you hire the same team again for the same problem? Why or why not?		

Reference verdict

Confirmed result: _____ Hidden cost or risk: _____ Would rehire: YES / NO / UNCLEAR

4. Protect ownership and record the decision

Account ownership feels administrative during a pitch. It becomes the entire story when the engagement ends.

Asset	What the company must retain	Owner confirmed	Handoff deadline
Domain and DNS	Registrant, billing, recovery, and administrator control	YES / NO	_____
Google Analytics 4	Administrator access, event definitions, audiences, and export	YES / NO	_____
Google Search Console	Verified owner, verification method, sitemap, and issue log	YES / NO	_____
Google Ads	Client account, billing visibility, admin control, campaigns, and change history	YES / NO	_____
Meta Business Portfolio	Business ownership, billing, pixels, pages, catalogs, and audiences	YES / NO	_____
CRM and email platform	Super-admin, contacts, consent records, workflows, segments, and suppressions	YES / NO	_____
Creative and landing pages	Final and editable source files, fonts, licenses, copy, and version history	YES / NO	_____

Four hard gates	Decision record
☐ Core accounts remain client-owned. ☐ Material claims reconcile with source records. ☐ Contract permits practical data and file export. ☐ Named delivery team is disclosed.	Selected agency: _____ Starting scope: _____ Decision owner: _____ Review date: _____

Final judgment

Choose the agency whose competence remains visible after the pitch deck closes. If trust is expensive to verify or the relationship is hard to leave, don't sign.