



J A C O B S & C L E V E N G E R

## Agency Performance Evaluation

Client \_\_\_\_\_ Review Period \_\_\_\_\_

Prepared by \_\_\_\_\_ Title \_\_\_\_\_

Date \_\_\_\_\_

Any organization can improve the way it does business. But first they need to know where to start.

Please complete this questionnaire for your agency.

Please note that the rating system uses a 1-5 index, with 5 being the highest score and 3 representing “acceptable, average” performance.

### Evaluation of Account Management

	1	2	3	4	5	N/A
	Needs Improvement		Average		Outstanding	
1. Knows and understands client’s products, markets and strategies.						
2. Contributes to help achieve business goals through strategic thinking, marketing counsel and problem solving.						
3. Understands priorities and can mobilize and focus resources on the task, has a sense of urgency, meets deadlines, etc						
4. Brings in a high level of marketing acumen, is involved in client’s business and conducts him/herself professionally.						
5. Is involved in short and long term planning.						
6. Builds good client relationships; communicates clearly and in a timely manner, keeps client informed, and creates a sense of partnership.						
7. Develops clear and well-conceived presentations. Agency point of view is always well supported.						
8. Knows how and when to use research to help develop effective marketing communications.						
9. Is cost-conscious, keeps within prescribed budget, and cares about the client’s money.						
10. Maintains accurate and timely billing and accounting procedures.						
11. Evaluates programs and makes program recommendations based on thorough analysis/conclusions.						
12. Overall evaluation of account group.						



**Evaluation of Creative Services**

	1	2	3	4	5	N/A
	Needs Improvement		Average		Outstanding	
1. Creative group is knowledgeable about client's products, markets and strategies.						
2. Agency explores alternative creative approaches that are innovative.						
3. Develops creative products that are on strategy, distinctive, in keeping with brand tonality and corporate guidelines.						
4. Agency presentations are well organized with sufficient examples of proposed executions.						
5. Is willing to accept client feedback and consider alternative ideas.						
6. Copywriting is high quality and effective.						
7. Art direction (design, photography, typography) is high quality and effective.						
8. Maintains consistent quality and final product meets expectations.						
9. Creative work is an execution of agreed-upon strategy.						
10. Overall evaluation of creative services.						

**Evaluation of Production Services**

	1	2	3	4	5	N/A
	Needs Improvement		Average		Outstanding	
1. Maintains positive control of production costs and other related charges.						
2. Creates estimates that are clear, accurate, and delivered on a timely basis.						
3. Maintains quality of finished product.						
4. Seeks to guarantee the best price/value from multiple vendors.						
5. Provides value-added services through industry knowledge and the use of the latest production techniques.						
6. Overall evaluation of production services.						



**Evaluation of Media Planning and Buying Services**

	1	2	3	4	5	N/A
	Needs Improvement		Average		Outstanding	
1. Develops clear and precise media objectives and strategy.						
2. Develops media plans which reflect a solid understanding of the audience, products, and individual marketing strengths & weaknesses.						
3. Seeks to maximize marketplace effectiveness of client's media budget.						
4. Negotiates merchandising, such as lists, online advertising, positioning, etc. with media sales reps.						
5. Uses creativity in considering alternate media, innovative scheduling, ways to leverage sponsorship, etc.						
6. Tracks media buying performance regularly and issues reports (e.g. post-buy analysis and program quality analysis) on a timely basis.						
7. Overall evaluation of media planning and buying services.						

**Evaluation of Data Analysis and Database Development**

	1	2	3	4	5	N/A
	Needs Improvement		Average		Outstanding	
1. Strong data management and consultation on data capture requirements.						
2. Develops sound strategies for data quality enhancement, multi-source data solutions, etc.						
3. Structures programs to provide for meaningful analysis and measurement.						
4. Develops relevant and useful metrics and associated reports.						
5. Translates analytics into meaningful, understandable learnings.						
6. Works effectively with internal IT and other partner groups.						
7. Acts as advocates for marketing in database development initiatives.						
8. Provides technical expertise and recommends operational efficiencies (where appropriate).						
9. Provides appropriate database recommendations for business size, circumstances, etc.						
10. Overall evaluation of Data Analysis and Database Development.						



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## **Overall Agency Evaluation**

What, in your opinion, are the agency's major accomplishments on behalf of your business during this reporting period?

What are the agency's major strengths?

What are the areas of concern and how could the agency's performance be improved?

Does the agency take the initiative in providing marketing counsel? Does this counsel reflect an interest and understanding of the client's important business issues?

Rate the overall agency performance during this reporting period: Better, Same or Worse as the previous period? Why?

What steps can be taken by both agency and client to improve, enhance, and create a more productive relationship in the next 6-12 months?