

What to Expect from Your New Marketing Partner

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So you've decided to partner with a marketing firm. As you initiate such a partnership, various stakeholders at your company may have certain expectations in mind: that your partner will deliver a certain amount of new leads in a specific amount of time, that they'll take work off your plate, or that they'll double revenue by the end of the year.

But how can you establish what is actually realistic, both with your new partner and with people inside your organization? And what should you do to ensure that this new relationship helps you achieve your goals?

Both before you begin searching for a new marketing partner and after you've signed the contract, you need to accurately set expectations for yourself, your team, and your firm about what the new partnership will bring to the table. It all begins with knowing what to ask for. Here are a few key things you should expect from any marketing partner you're considering working with:

- 1 An understanding of your goals.** In the first meeting you have with all prospective marketing firms, clearly outline your most important marketing goals. Be as specific and quantitative as possible: are you planning to redefine your brand?

Are you looking for new leads in the next year? Or are you more interested in driving referrals and upsell from current customers, with a goal of making new revenue from these efforts? And what proportion of these leads or this revenue are you expecting your new partner to directly contribute?

You should also be prepared to explain how you came up with these goals and what you're currently doing to achieve them. If these are numbers arbitrarily picked by you (or your CEO), the firm needs to know that. If they're derived from a minimum revenue figure your company needs to reach to expand into a new territory, they need to know that as well.

Once you've communicated your goals and where they came from, look for the marketing firm that can demonstrate a solid understanding of where you're looking to go and can explain how they will help get you there. If the firm staff you're working with simply nod and promise that they can deliver, don't just take their word for it. Ask about the strategies they'll establish and the tactics they'll employ, their timeframe, their measurement tools, and how much it will cost. Make sure they can show you that they've delivered similar results for other companies with similar budgets. In the proposal stage, watch for marketing firms to develop their strategy around your goals. Their recommended tactics and KPIs should illustrate that they're aligning their approach with your objectives to produce the metrics that really matter to you.

1.5 But with some pushback.

It can be tempting to work with a marketing firm who promises to deliver on everything you want, but these "yes people" aren't always the best people for you. In fact, they may take a look at the current state of your company, your operations, and your budget and recommend reevaluating your internal goals.

Remember: you hired an outside firm to get an outside, expert perspective, and that often means that your prospective partner will bring a new idea to the table that you haven't been able to see internally. Pushback on your original goals isn't a sign that your new partner is difficult to work with, it's a sign that they've done their research and are realistic about their abilities and your potential. So if they recommend a strategy predicted to bring in fewer new leads this quarter, but can assure you they'll be top-quality, high-conversion contacts, try taking their advice. It may save your company time and money in the long run.

2 An effort to further your goals.

The best marketing firms won't just accept your goals as their end game: they look a step further. Say, for example, you need to drive X amount of revenue in order to expand into a new territory. A good firm will look at that goal and ask "why?" and "what's next?" In this case, it might be that you're interested in solidifying an international presence within the next five years so that you can compete with bigger players in your industry, or that you're looking to fill a void for a product you produce

in a particular region. These goals may be far-off and vague, but a great marketing partner will help you flesh them out and lay the strategic foundation to achieve them in the future.

An average marketing firm will show you how they're going to help you meet your most immediate goals. The marketing partner you want will give you recommendations that show how they'll help you exceed those goals and prepare for the next steps.

3 Transparency.

Do you know what work your new prospective partner firm has already done? Have you checked out the background of their key staff members? Do they have references, testimonials, or online case studies? When it comes to their impact and work style, don't just take their word for it. Ask for references from past or current clients, and actually call them. If they don't give out references, walk away — it's a major red flag.

If you get in touch with the firm's references, don't just ask about the bottom-line impact the firm has made. It's just as important to get a sense of how they work as it is to understand what they produce. Are they prompt in responding? Did they implement a clear process for approvals, making recommendations, and implementation? Did they provide clear, understandable metrics, fess up to mistakes, and celebrate wins? Were they simply enjoyable to work with? All of this information is important to know before you sign a contract, and it's not always the kind of information that can be gleaned from business development meetings.

4 A process.

A firm may present you with a compelling strategy and a series of tactics that make sense, but they need to be equally able to articulate how this strategy becomes reality. To do this, they need to present you with a set process, including deadlines, information, and input they need from you and a breakdown of who's responsible for what.

Be prepared to discuss who on your team will be the primary point of contact for the marketing firm, and who on their side you should go to with questions or concerns. A marketing firm with a good process makes it clear how the strategy will work, how much time they'll need from your team, and what kinds of resources they'll need from you to achieve your combined goals.

One of the most important processes your new firm should lay out is an approach for reporting results. Expect your firm to deliver a monthly metrics report to you that doesn't just include KPIs that show how their work aligns with your internal goals and priorities, but also gives you a solid overview of where they've spent their time that month and how it's helped bring their strategy to reality. Ask to see a sample metrics report from another client, and ask them to explain what you're looking at as it relates to the client's strategy. A marketing firm that can articulate what metrics they're including, how they've changed month-over-month (and why they're changing) and why these particular measures are important is one worth a longer look.

5 A timeline.

Your new partner firm knows you're focused on ROI, but a marketing strategy isn't executed overnight. They should set expectations with you on what

front-end work needs to be done (content creation, website design, SEO strategy and/or research may be needed) as well as how long it will take before you start seeing real results. You should be prepared to point out key dates where you or your team will be unavailable to review of key deliverables. This will avoid any unexpected delays, and help keep everyone on track.

6 Fun.

You wouldn't enter into a friendship with someone you don't like, so why would you enter into a business relationship with someone you don't "click" with? Don't discount the "fun factor" and chemistry when choosing a partner: do you actually like the people in the marketing firm? Have you met their team, and do you all get along?

If your teams are unhappy working together, the quality of the work and the results it produces will suffer. You may have wildly different styles (a creative agency can add depth of perspective to a conservative company, while a more formal marketing agency can add legitimacy and structure to a laid-back startup) but if you wouldn't get a coffee with these people, don't bother working with them.

A partnership with the right marketing firm offers access to expertise, time, and resources that can take your company to the next level. However, it's essential that you, your company, and your prospective firm understand what to expect from such a partnership in order to maximize productivity, results, and ROI throughout the duration of your time working together.

What do you look for in a marketing partner?