



20 Critical Lead Generation Questions

A practical checklist from **Xynario** to evaluate any lead generation agency before you sign. Focus on written qualification standards, data quality, infrastructure, and exit rights, not promised volume.

Full guide + downloadable scorecard: <https://xynario.com/lead-generation-questions-before-hiring-agency/>

Agency Evaluation Scorecard

Score every vendor the same way. Treat any score of **2 or below** in Qualification, Data Quality, or Contract Flexibility as a hard stop, regardless of the total. Download the editable Excel/PDF scorecard at xynario.com.

Category	What Good Looks Like	Score 1-5	Notes
ICP and targeting clarity	Written ICP, mandatory vs preferred criteria, account selection process shared before launch		
Qualification definition rigor	Written definition covering firmographics, role, budget, authority, timeline. Attached to SOW		
Data source transparency & quality	Named sources, verification process, recent bounce rates under 5%, clear ownership terms		
Channel strategy fit	Multi-channel plan matched to sales cycle, client approval rights on messaging		
Messaging ownership & quality	Client can review and reject messaging. No fully automated black-box outreach		
CRM and reporting depth	Opportunity-level data inside client CRM. Contact-to-meeting and meeting-to-opportunity rates visible		
Pricing transparency	Line-item breakdown of data, domains, tooling, reporting, creative. No hidden add-ons		
Contract flexibility & exit rights	90-day pilot or month-to-month after review. Clear data export. Performance clause present		
Proof and relevant references	Named clients in same or very similar vertical and deal size that you can actually contact		
Compliance and infrastructure	Dedicated or segmented domains, full SPF/DKIM/DMARC, documented opt-out and hygiene process		

Hard stop rule: Any score of 2 or below in Qualification, Data Quality, or Contract Flexibility = disqualify the agency.

The 20 Critical Questions

Ask these in writing before the first call. Listen for specific, verifiable answers. Vague language is usually the first warning sign. This framework is published by Xynario to help buyers protect pipeline quality.

1. How do you define a qualified lead or qualified meeting for clients like us?

Why it matters: This is the highest-leverage question. Everything else depends on the answer.

Good answer: give a written definition covering firmographics, role, budget, authority, and timeline, and attach it to the statement of work.

Red flag: If they say "We deliver high-intent decision-makers" or "Our AI scores intent" with no measurable criteria you can audit, walk away.

2. Which ICP criteria are mandatory versus preferred?

Why it matters: Mandatory criteria protect your sales team's time.

Good answer: clearly separate mandatory (e.g. company size, industry) from preferred criteria and put both lists in writing.

Red flag: If they say everything is "flexible" or "we adapt as we go," you will argue about every lead later.

3. How do you verify buying intent before a lead reaches sales?

Why it matters: Not all intent signals are equal.

Good answer: uses a multi-signal process (engagement + firmographic fit + explicit interest) with a human review gate before the lead enters your CRM.

Red flag: If scoring is fully automated with no human check, expect low-intent meetings.

4. Where does your contact data come from?

Why it matters: Data source sets the ceiling on quality, deliverability, and compliance risk.

Good answer: names the providers or describes proprietary research, plus a clear verification process and ownership terms.

Red flag: If they only say "multiple databases" or "proprietary technology," you have no visibility into quality.

5. How often is data refreshed and what bounce rates do you typically see?

Why it matters: Stale data damages domain reputation over time.

Good answer: shares a documented refresh cadence and recent campaign bounce rates consistently under 5%.

Red flag: No bounce-rate target or refusal to share recent numbers is a red flag.

6. Who owns the contact data and campaign assets when the engagement ends?

Why it matters: Ownership decides whether you can continue the work in-house or switch vendors cleanly.

Good answer: confirms you own the data and sequences, with clean CSV or CRM export included at no extra cost.

Red flag: If the agency keeps exclusive ownership or charges large exit fees, you are locked in.

7. How do you select target accounts and contacts?

Why it matters: Account selection quality determines whether sales spends time on the right buying committees.

Good answer: uses ICP-driven list building with firmographic, technographic, and intent filters, reviewed with you before launch.

Red flag: Generic purchased lists or "we already have a large database" usually means wrong accounts.

8. Which channels will you use and who writes the messaging?

Why it matters: Channel mix and message ownership affect both results and brand risk.

Good answer: offers a multi-channel plan matched to your sales cycle with clear client approval rights on messaging.

Red flag: Single-channel only or fully automated messaging with no review step is a risk.

9. Who handles replies and books the meetings?

Why it matters: Response quality and speed influence show rates and opportunity conversion.

Good answer: names the team members or process, includes response-time targets, and has a qualification gate before booking.

Red flag: "Our system books automatically" with no human qualification step usually produces high no-show rates.

10. Which metrics do you report and can I see CRM-level opportunity data?

Why it matters: Activity metrics hide quality problems. Pipeline metrics reveal them.

Good answer: tracks contact-to-meeting, meeting-to-opportunity, and opportunity value inside your CRM.

Red flag: Heavy focus on emails sent, opens, or raw meetings booked without quality filters is a warning.

11. What happens when lead quality drops?

Why it matters: Every program has variance. How the agency responds shows if they are a partner or just a vendor.

Good answer: has a written replacement or credit policy tied to the qualification definition, plus a defined optimization process.

Red flag: "We will look into it" or no formal policy means you will argue every month with no leverage.

12. Can you show results from clients in our industry with similar deal sizes?

Why it matters: Vertical and deal-size relevance predicts whether results will transfer.

Good answer: provides named references you can contact, plus sample campaign data under NDA if needed.

Red flag: Only logo walls or case studies from unrelated industries is a soft red flag.

13. How do you charge and what is included versus extra?

Why it matters: Hidden costs and misaligned incentives surface after the contract is signed.

Good answer: gives a clear line-item breakdown of data, domains, tooling, reporting, and creative.

Red flag: Bundle pricing with no visibility into components usually leads to surprise invoices.

14. What is the minimum commitment and what are the exit terms?

Why it matters: Exit rights protect you when quality or fit fails.

Good answer: offers a 90-day pilot with clear go/no-go criteria, or month-to-month after an initial period. Data export is included.

Red flag: 12-month lock-in with 60-90 day notice and no performance clause puts all risk on you.

15. Can we run a paid pilot before full commitment?

Why it matters: Pilots surface real delivery quality under controlled conditions.

Good answer: says yes, with predefined success metrics and a clear path to continue or stop.

Red flag: Full annual commitment required before any delivery means they are not confident enough to prove it first.

16. Who owns the sending domains and infrastructure?

Why it matters: Shared infrastructure creates cross-client reputation risk.

Good answer: uses dedicated or carefully segmented domains with full authentication under your control or clear handover terms.

Red flag: Shared domains or refusal to discuss infrastructure details puts your reputation at risk.

17. How do you handle SPF, DKIM, and DMARC?

Why it matters: Google requires authentication for bulk senders. Unauthenticated messages face higher spam placement.

Good answer: runs full authentication on all sending domains, monitors continuously, and gives you visibility.

Red flag: "Our ESP handles it" with no client-visible configuration leaves you with zero control.

18. How are opt-outs and compliance handled?

Why it matters: Both the brand and the sender can be held responsible under CAN-SPAM rules.

Good answer: has a documented process, client visibility into suppressions, and clear ownership of compliance responsibility.

Red flag: Vague claims of "best practices" with no process detail means compliance risk sits with you.

19. What is your process for list hygiene and bounce handling?

Why it matters: Ongoing hygiene protects domain reputation over months, not just at launch.

Good answer: does regular verification, automatic suppression of hard bounces, and transparent reporting on list health.

Red flag: No documented hygiene process leads to rising bounce rates and gradual domain damage.

20. Who is responsible if our domain reputation is damaged?

Why it matters: Reputation damage can affect every future email from that domain.

Good answer: includes clear contractual language on monitoring, remediation steps, and liability allocation.

Red flag: Refusal to discuss reputation risk or exclusive focus on their own domains leaves the downside entirely with you.

How to Use This Framework

Follow these steps in order. Do not skip the first three.

1. Write your Ideal Customer Profile and the exact definition of a qualified lead / qualified meeting before you speak to any agency.
2. Send the full list of 20 questions in writing (email or RFP) at least 48 hours before the discovery call.
3. On the call, force every answer into the scorecard the same day. Score each category 1-5 while the conversation is still fresh.
4. Treat any score of 2 or below in Qualification definition, Data quality, or Contract flexibility as an automatic disqualification.
5. Require the critical definitions (qualified lead, replacement policy, data ownership, exit terms) to appear in the statement of work before you sign anything.
6. Run a paid 30-90 day pilot with clear success metrics. Only move to a longer commitment after the pilot data is reviewed inside your own CRM.

Need help evaluating agencies or building verified pipeline? Xynario helps mid-market and enterprise teams with B2B lead generation, AI-assisted qualification, CRM execution, and email infrastructure. Start here: <https://xynario.com/services/lead-generation/> or book a free discovery call at xynario.com.

Sources & Research Basis

These 20 questions were synthesized by Xynario from multiple independent buyer guides, RFP checklists, deliverability standards, and qualification frameworks published between 2023 and 2026:

- SaaS Hero - 21 Questions to Ask a Lead Generation Agency
- Phi Consulting - Seven Questions to Ask Every Lead Gen Agency
- DoneMaker - 10 Questions to Ask Before You Sign
- LaunchLeads - Buyer's Guide from a \$3B Pipeline Operator
- Leadbull - 10 Critical Questions for B2B Lead Generation Agencies
- Google Email Sender Guidelines (SPF, DKIM, DMARC requirements)
- FTC CAN-SPAM Act Compliance Guide
- BANT (IBM) and MEDDIC qualification frameworks
- Bounce-rate benchmarks from Cleanlist, Belkins, and Validity (healthy verified lists typically under 2-5%)

Published by Xynario (xynario.com). The agencies that answer these questions clearly and accept the corresponding contract language are the ones worth testing. The ones that cannot usually turn budget into contacts instead of pipeline.