

Agency Evaluation Scorecard

Print this or copy it into a spreadsheet. Score every vendor the same way so you can compare apples to apples. Treat any score of 2 or below in Qualification, Data Quality, or Contract Flexibility as a hard stop, regardless of the total.

Category	What Good Looks Like	Score 1-5	Notes / Evidence
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 and quality	Named sources, verification process, recent bounce rates under 5%, ownership terms clear		
Channel strategy fit	Multi-channel plan matched to sales cycle, messaging approval rights for client		
Messaging ownership and 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 and 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 definition rigor, Data source transparency, or Contract flexibility → Disqualify the agency regardless of total score.