

— IS YOUR —

PPC AGENCY WASTING YOUR BUDGET?



— IS YOUR —
**PPC AGENCY
WASTING YOUR
BUDGET?**

Could your PPC campaign be
making more money?

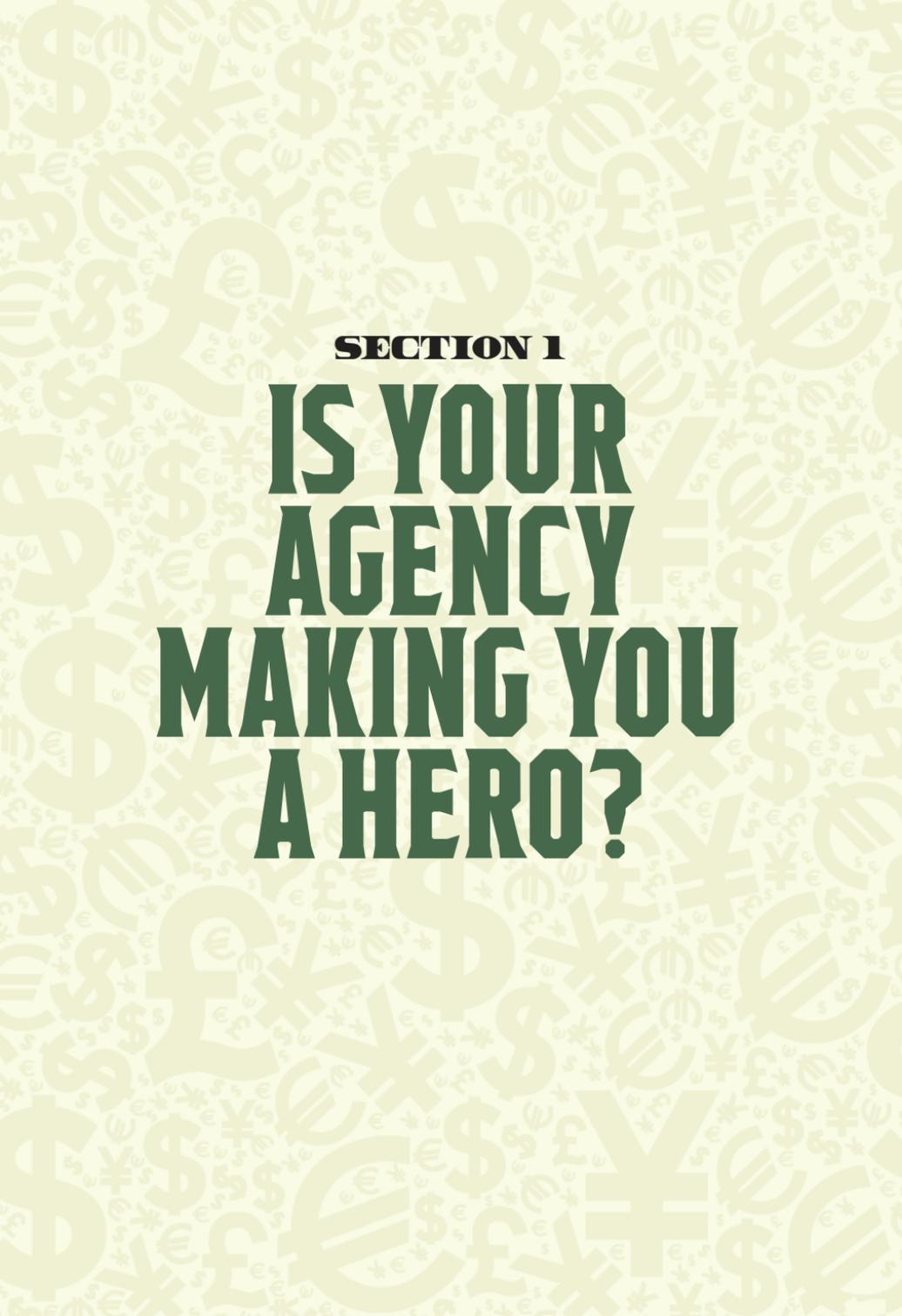
Absolutely.

Even the most well-intentioned account managers are leaving PPC opportunities on the table. We find that it's because they lack what we call the "SalesX Trifecta" of tricks and tools to fully maximize your ad spend.

The **SalesX Audit** will show you all your hidden gems and opportunities that are waiting to be exploited. Want to see your audit, and learn how we get such dramatic results? Get in touch today.

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SECTION 1

**IS YOUR
AGENCY
MAKING YOU
A HERO?**

CHAPTER 1

CULTIVATING AGENCY BEST PRACTICES

BY JOE KHOEL, SALESX

It's Friday afternoon. You and your colleagues are gathered in the boardroom. Your latest digital ad campaign has far exceeded expectations. Consequently, you've received a raise, and your fellow execs are relishing the accolades they've been showered with. Pop open the champagne!

A dream scenario? Actually, it can be your reality -- provided the following factors are in place:

- Your agency is finding and maximizing new channels of advertising that systematically impact key business value areas of your enterprise.
- Advertising successes are aligned to your company's metrics.

Alignment Generates Transparency -- and Increased Accountability

Performance and metrics alignment results in transparency and greater accountability: The digital advertising campaign is on the hook to perform, while your company must maximize the results of that performance by having internal processes ready to receive and interpret the data. Let's talk about what exactly this means.

What Alignment Looks Like

Let's say your company is a services company with 200 locations. You measure success for each individual location by assessing new client acquisition growth weekly, year over year.

Your analysis might address new client acquisition results on week 12 of 2017 vs. week 12 of 2016. Was there growth? If there was, what was the percentage of growth for each branch of your 200-branch services company?

Comparing last week's results with your year-to-date results, are you on track to meet your annual number -- and to distribute bonuses to stakeholders in your company? If that is how success is being measured inside your company, then your digital advertising should be measured the same way.

The tools and methods to achieve this are readily available. The onus is on your agency to have the skills to provide you with the data the way that you need to receive it.

23,000 Options For Achieving Campaign Success

How can your agency best meet your needs? Well, therein lies the beauty of digital advertising.

For example, Google AdWords alone has 47 different features that can be utilized in an ad infinitum number of combinations.

Further, there are at least 26 common areas that require regular monitoring and adjustments to ensure your campaign is up and running at optimal effectiveness.

Three Requisite Agency Masteries

To fully service your company's campaign needs, your agency will need mastery over:

- 1) The technical side of digital advertising;
- 2) Business implications of decisions;
- 3) Transparent reporting elements

Technical Mastery

From a technical perspective, an effective way to gain mastery is to continuously test, have the ability to analyze results and to execute changes based on the findings of those tests, en masse. While it is easy to claim continuous testing, the key is to routinely and rapidly analyze the results and to execute action based on those results. In short, your agency needs experts

obsessed with PPC whose DNA includes a continuous testing and execution cycle.



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Business Implications Mastery

The next step is to tie results back to business value. That's where the executives of your agency must educate you about the nuances of digital advertising -- and to collaborate with you so that measurable business value relates back to campaign results.

Real-life example: a company with 50 branches decided to discontinue their ineffective TV advertising in favor of digital ads. The goal was to capture prospects who were likely to tour their locations and sign up. Surprisingly, they soon discovered that despite the increased prospect sign-ups, the ratio of no-shows for the tour had actually spiked, thus giving the impression that the digital ad sign-ups were less effective than the ones acquired through the TV ads.

However, upon further exploration, we found out that the company's internal processes did not include reminder emails,

calls or text messages. We then employed follow-up emails and texts right up to the tour date/hour. With those corrections in place, the increased leads were accompanied by a corresponding increase in tours and sign-ups.

Making sure your company understands the nature of digital leads, and to provide appropriate best practices guidance will maximize your results.

Transparent Reporting Mastery

In short, your agency should be showing you the results that are being achieved and the level of effort that is being applied. For instance, an ecommerce company might have 150 different categories and hundreds of thousands of keywords they are targeting.

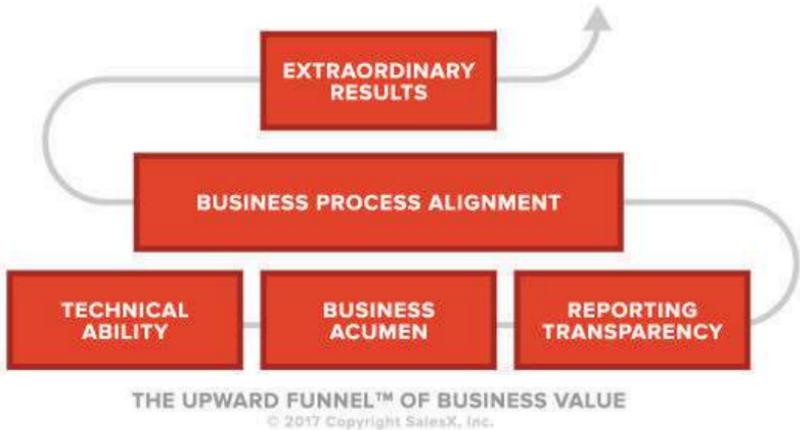
The agency should make available to you:

- 1) Real time insight into the status of their primary and secondary KPIs;
- 2) Recent projects and time allocations with the ongoing work that is being done for them;
- 3) Spend allocation by channel;
- 4) Record breaking dates and trends;
- 5) Possible account errors and flags;
- 6) Click through rates, impressions, conversions and value, costs, top campaigns and device breakdowns;
- 7) Sessions trends and top performing geo locations and hours
- 8) Channels driving unique purchases, etc.

This information should be available to you in real time with current data as well as historical data.

Getting the Most Mileage out of PPC

PPC is a method that can be leveraged to impact the entire length and breadth of your opportunity funnel. Your agency needs astute technical chops, real life business experience, and the ability to program for innovative data measurement that matches your business needs. If they have those three foundational elements -- and are willing and able to work with you to ensure any gaps in your business processes are identified to match your digital opportunities -- extraordinary results will be an inevitable outcome.



CHAPTER 2

HOW TO CHECK IF YOUR AGENCY IS UP TO THE TASK

BY FREDERICK VALLAEYS, OPTYMYZR

Regardless of who's managing your PPC account, an agency, an in-house team, or even yourself, there are a few red flags that can indicate it may be time to consider the alternatives.

So what are some of the red flags to look out for with your account team? There are many but I'll cover some of the ones that are critical yet relatively easy to spot.

Red Flag #1: Bad Conversion Tracking

What makes online advertising, and PPC in particular so powerful is the fact that it's extremely measurable. The engines like AdWords provide reports on what keywords were clicked, how much those clicks cost, and what the users typed into the search box to see your ads.

If you've set up conversion tracking, the report will also include how many leads, sales, and other conversions resulted from these clicks. And once you know both cost and conversions,

you can easily calculate key business metrics like Cost Per Action (CPA) and Return On Ad Spend (ROAS), and use this to double down on successful keywords, and trim the waste on ones that aren't profitable.

But if conversions are not tracked correctly, you're missing half the picture, and it makes it impossible to do intelligent data-driven optimizations. With bad conversion data, your account management team is flying blind. While they might still improve the account by applying best practices, you can't expect them to be as effective as when they have proper conversion data.

When I started working at Google in 2002, one of my first projects was to build a conversion tracking pixel so that advertisers would know if a user came to the page that corresponded with a conversion. It's crazy to think that there was a time in AdWords when conversion tracking wasn't even available.

Luckily for us, the technology has come a long way. Now we can use Google to track conversions like offline sales and foot traffic to our stores. But as tracking has become more powerful, it's also more complex to set up correctly.

Work with your account management team to get proper tracking in place. Agree on how you will value various types of conversions in your attribution model. How much value should the first interaction have relative to the last interaction before the conversion? Will you assign any value to newsletter signups or only to actual sales?

These are important questions because the team you've hired to win the online marketing game for you needs to know the goal and how it's being measured. Only then can you expect them to work towards delivering the results that you're paying for.

Red Flag #2: Sloppy Account Structure

This red flag is entirely the responsibility of the account manager, and it is an easy one to spot: is the account structured properly using industry best practices?

You can use tools like the Campaign Details and Ad Group Details reports on the Dimensions tab in AdWords to figure this out.

Ad group	Campaign	Ads active	Keywords active	Negative keywords (campaign)	Negative keywords (ad group)	Negative keywords (shared lists)	Status active	Bid strategy	Bid strategy type	Ads disapproved	Keywords disapproved	Site size
		15	4	0	0	1	8	—	CPC	0	0	
		11	3	11	0	2	6	—	CPC	1	0	
		10	14	8	0	5	0	—	CPC	0	0	

Here are the main things to look out for:

1. Ad groups with no ads
2. Ad groups with no keywords
3. Ad groups with too many keywords (30 is a good maximum to start with)

4. Ad groups with no negative keywords
5. Campaigns with fewer than 4 sitelink extensions

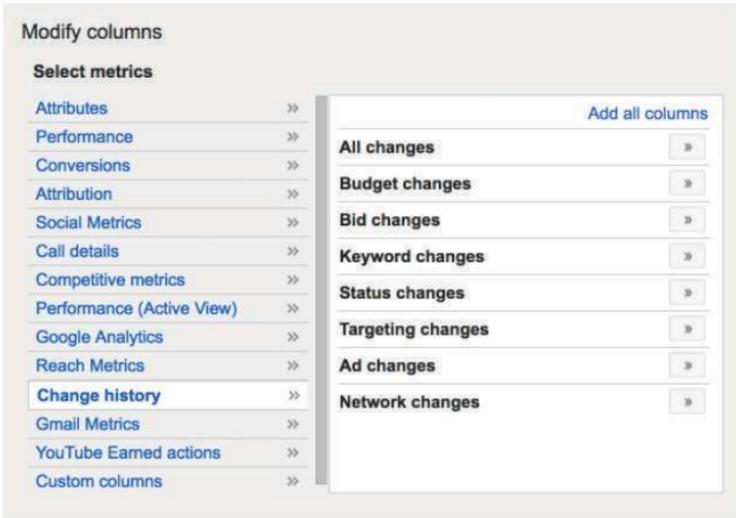
A properly set-up account should have ads and keywords for all search ad groups. It should use the most popular extensions like sitelinks for all campaigns.

A well managed account will keep its keyword counts below a certain level and have an always growing number of negative keywords.

When an analysis of the structure turns up surprises, it's an indicator that the account team is doing a sloppy job of setting up new ad groups, or ignoring common optimizations. It may be that they don't have proper processes for ensuring consistent quality or that they are not leveraging technologies like AdWords Scripts that help produce more consistently high quality account builds. When you see this, ask for an explanation.

Red Flag #3: Lack of Intelligent Activity

Your account team's job is to help you get the most from your AdWords account. Different teams will approach this in different ways, some may log into your account daily to make small batches of changes, others will go in less frequently and do bigger changes. **What ultimately matters is that there is consistent activity in the account over the course of any month.** You can easily check this by adding change history columns to the campaigns tab.



When evaluating the number of changes, don't just look at the total changes: consider the type of change. The number of bid changes should probably be significantly higher than the number of ad changes.

This is because bids may change daily whereas ads may take weeks before reaching the conclusion of a statistically significant A/B test. This is why I say you should look for intelligent activity and not just the sheer quantity of changes.

Too many changes should merit a closer look. Budgets should not change more than once a day for any campaign. Hourly budget changes is akin to steering an ocean liner by constantly turning. Your manager should be setting the course for the month and make periodic adjustments to stay there, but there is usually no need to make tweaks every hour.

The easiest red flag to spot is to look for months with very low activity or months with inconsistencies in the levels of activity.

Red Flag #4: Not Getting the Level of Attention You Deserve

Be realistic about what level of effort and customization to expect from your team. If you're paying someone three hundred dollars per month to manage an account, you can't expect that they will spend 20 hours working on very manual optimizations.

If your investment is minimal, you're paying someone for their expertise using the tools built directly into AdWords.

While you could do the work yourself and set up Automated Rules, pick a good Flexible Bid Strategy, and figure out the best automatic ad rotation settings, you're paying to get the help from an expert who's done it before and who will do it in the best way possible for your business.

As you start to pay more for account management, you should expect that the basic account management checklist is getting handled and that you're also getting more project work and the implementation of some custom strategies.

Another way to think about it: imagine the management fee equating to an hourly wage. Then see if that hourly wage seems in line with the agency's reputation and expertise.

Someone once told me that agencies should determine their price point by doubling the fee from their last contract signed. When sales slow down, that's when the agency has found its correct price point.

If you've been with an agency for a while and meanwhile they've kept raising their fees for new clients, that may leave you as the smallest client at the agency. The harsh reality is that maybe you're not as important a client as you once were to them. You may need to pay more to get the most from the agency's new capabilities.

If you're no longer an important client, it may be time to find a new agency. Or if you're happy with the current agency, ask if paying more would get you more of the team's time, and even better results.

Red Flag #5: Your Competitors Always Seem to Have Access to Better AdWords Features

Agencies, especially good ones, will have dedicated account teams at Google, Bing, and Facebook, something you may not have access to on your own. Make sure your agency is giving you access to the special beta features that come with their special relationships with the platforms.

At the same time, be cautious that you're not wasting time by being a guinea pig before a new feature is really ready to drive results. Expect that the agency will know exactly how a new feature makes sense for your industry and an advertiser of your size.

If you're not getting access to beta features, or you're not getting a quick resolution on account issues, your team may need to do a better job building their provider relationships.

Red Flag #6: You're Always the One Starting Conversations

Communication is a cornerstone of any good relationship. That holds true for agency-client relationships as well.

You should expect that your agency will send you at minimum, a monthly status report. A good agency shares just the executive summary and only goes into great detail if you ask for it.

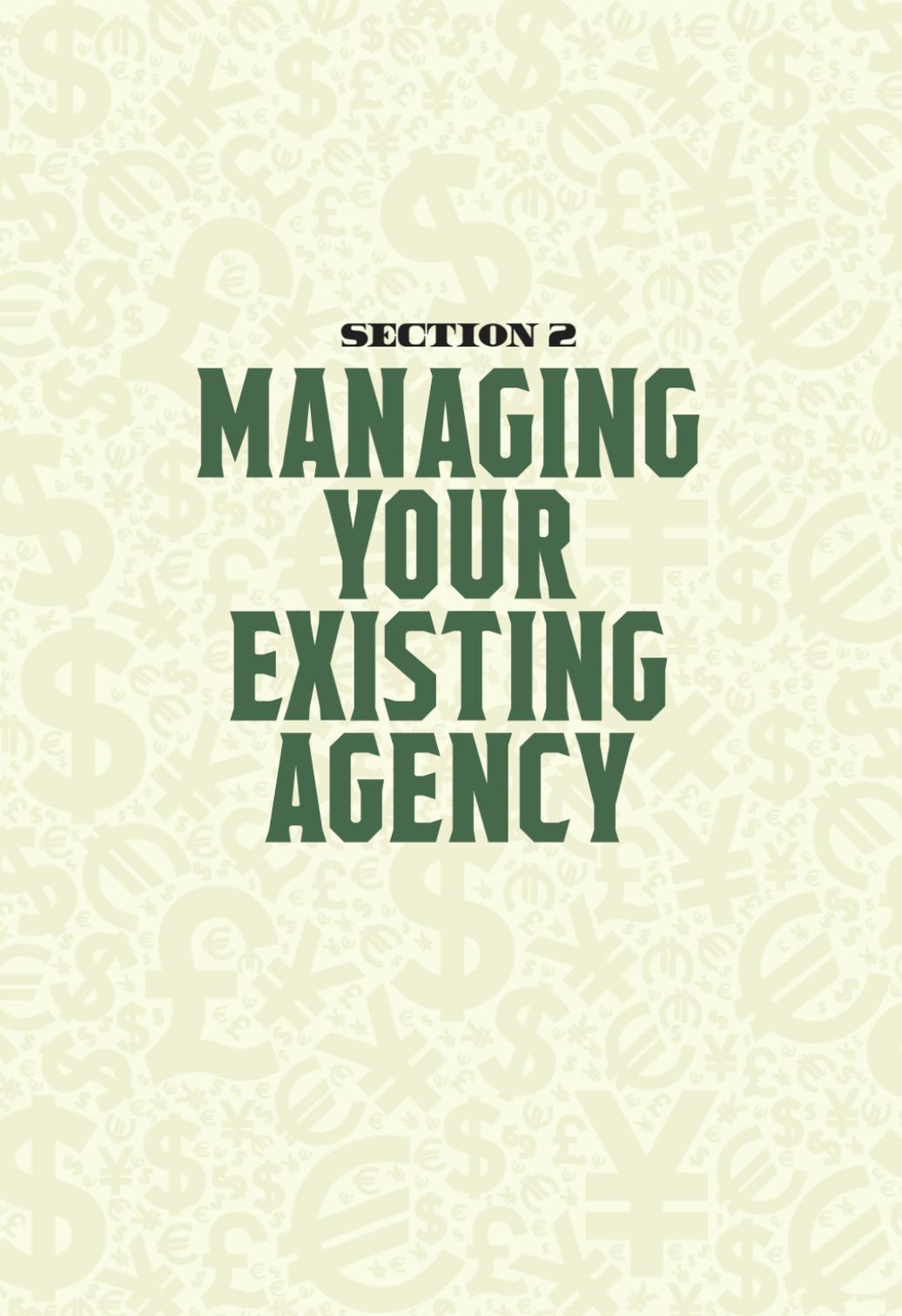
If they send you a spreadsheet with hundreds of rows of data, beware. The only reason for this is if they expect you to tell them what to do with the data. That's a red flag, because well, that's *their* job.

If you never experience a dip in performance, count yourself lucky. Even the best management teams can be caught off-guard by a Google update, a change in consumer behavior, or a glitch in your landing page performance.

It's important that your agency communicate concerns openly with you. For example if they need your team to improve your landing pages, or if they are worried that conversion rates are low because your prices are not competitive.

An agency with only yes-people won't push you to make your business better, so it's important that they feel they can bring up difficult topics without it turning into a blame game. That means you as the client should try to keep an open mind during calls so that you foster a culture of collaboration.

Ultimately it comes down to having mutual respect for each other and having shared incentives. If that is missing, the relationship probably won't last, and it's probably time to interview a new account team.

The background of the entire page is a dense, repeating pattern of various currency symbols, including the dollar sign (\$), euro (€), pound sterling (£), and yen (¥). The symbols are rendered in a light, muted green color, creating a textured, financial-themed backdrop. The symbols are scattered across the page, with some appearing larger and more prominent than others, giving it a sense of movement and abundance.

SECTION 2

**MANAGING
YOUR
EXISTING
AGENCY**

CHAPTER 3

SETTING REALISTIC GOALS

BY KRISTIE MCDONALD, VITRUVIAN

To make sure your campaign gets the results you're looking for, you must define and communicate your goals to your agency. Even better, you should define your goals with your agency's help.

Choosing Your Goals

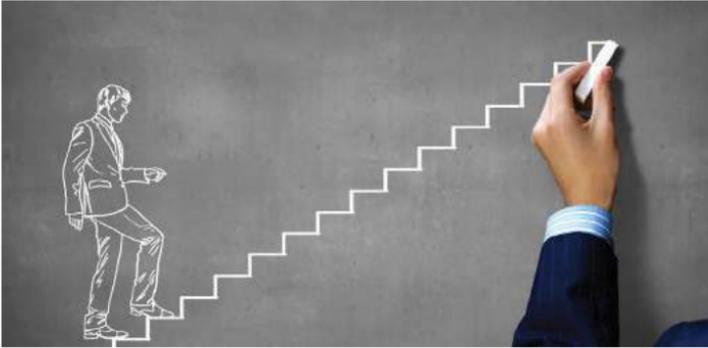
Advertising campaign goals fit into four main categories:

- Increase Awareness
- Increase Audience
- Increase Leads
- Increase Sales

Ask yourself: what is most important to my company?

Before you answer, remember the first rule of business you learned at your first lemonade stand: "Make more money than you spend!"

That's right, I'm going to recommend that you tie your goals to the most important goal for any company – Profit!



Tie Your Business Goal to Advertising Goals

The profit goal sounds obvious, but so many lose sight of this objective for two reasons:

1. There are many data points your agency account manager uses to optimize performance and it clouds the picture
2. The path from an ad click to a sale is complicated and sometimes difficult to track

You must understand the relationship of your bottom line goals to what can be realistically measured in a campaign.

A business that generates sales on the website can tie its sales and profit goals to the advertising campaign easily but if your business model is one that generates leads or phone calls to

close sales at a later date, the PPC campaign can only track those leads.

A critical step that is commonly missed is partnering with your agency to make the connection from campaign leads to realized revenue from those leads



When you close that loop, you will have the accurate details and information needed to fully optimize your campaigns. And by the way, most of your competitors aren't doing this, so you'll have a strong advantage.

This means that you'll need to work with your agency and developers to bridge the gap between a lead and a sale via your CRM or whatever you use to track leads and sales.

When you measure and attribute revenue to your PPC campaigns, you can then measure ROAS (Return On Ad Spend) which is a key performance indicator (KPI) for planning, forecasting and growing your business.

For example, if your goal is to increase sales by 20% and your website is measuring leads, you can work backward to identify how many leads will be needed to meet that sales goal. The lead goal is easy to measure and manage and becomes a main focus of your PPC campaign.

Get More for Less

If I had a nickel for every new client who told me “Our goal is to get twice as many conversions for half the cost,” well, I’d have a lot of nickels!

If you communicate to your agency that you want more for less, realize you are creating conflicting goals.



This is not to say that campaigns shouldn't be optimized – that is absolutely a top priority of any account manager: to get as many conversions as possible for the best price possible with all the strategies, tools and techniques we have at our disposal. However, AdWords is an auction and by its very nature, there is more exposure and traffic available to those who are willing to pay more.

A Better Method

Instead of creating a goal of “get more for less”, you should work with your agency to analyze and determine your Cost Per Acquisition (CPA) goal. In other words, what can you afford to pay to acquire a new customer?

One of the most powerful ways to maximize your advertising investment is to identify this number and then optimize a campaign to go after leads or sales available at that CPA.

Protip: When you find ways to improve your business model in order to increase the CPA you can afford, you will be able to increase your exposure over your competition!

Be Specific

The more specific you can be with your goals, the easier. The more specific you can be with your goals, the easier it will be for you to measure whether your campaigns are successfully meeting them.

For example, if your goal is to “get more leads”, how will you really measure success? Will you be happy if there are one or two more leads than last month? Probably not.

If you set your intention to “grow our leads by 10% over last quarter”, then you can measure success and your agency will have a clear picture of what you expect from their efforts.

Be Realistic

PPC campaigns go through various growth, plateau and expansion stages. There are also forces that affect the campaigns, such as competition, seasonality and search behavior. These factors are beyond anyone's control.



As you enter new expansion phases, manage your expectations. Do not expect a brand new strategy or channel to deliver the same ROI as an existing and optimized campaign.

Be prepared to set testing budgets for your campaigns so that you and your account manager can experiment with new ideas to discover additional profitable sources.

CHAPTER 4

RESULTS HAVE PLATEAUED. NOW WHAT?

BY MELISSA MACKEY, GYRO

You've been running pay per click search for a while. Up until recently, results have improved steadily, month over month. But now, you're noticing that results have plateaued. Now what?

Understand the expectations of PPC.

Most businesses are cyclical. Sales will naturally fluctuate from one month to the next. A travel agency will naturally be busier in July than in October. An electronics retailer will naturally be busier in December than in March.

PPC is no different.

It's unusual to see PPC results steadily improve over a long period of time. Usually, results will improve dramatically in the first three months under professional PPC management, and then start to level off – although performance increases may still be seen for a year or so. After that, though, fluctuations are as normal a part of PPC as they are of businesses in general.

Expecting every month in PPC to be better than the last is no more realistic than expecting your business's sales to increase every single month. Understanding the expectation is important.

If results have truly plateaued, ask your agency why.

Many good agencies will proactively notice plateaus, and point them out to their clients. It's always better for the agency to notice performance changes first, before the client. But if you're wondering why you're not seeing the results you're expecting, ask your agency to dig into it.

Let the agency know that you're expecting them to look at every angle and every engine. No stone should be left unturned. Expect that there will be some back and forth – they may come back to you with questions or ask for more details on your sales numbers. Don't hesitate to provide this data. Often, businesses get hung up on privacy issues or other "rules" that make them reluctant to share internal data. Don't fall into this trap. Provide every piece of information you can, short of personally identifiable data (which your agency shouldn't be asking for).

For example, if your agency is asking about lead quality, share your lead funnel data. Let the agency know how many PPC leads actually became MQLs and ultimately closed sales. The more detail you can provide, even down to the keyword level if possible, will help your agency troubleshoot and optimize.

Be open to testing new things.

After digging through every detail, your agency may come back with no particular reason why performance has stalled. That's ok – as long as they have recommendations for new ideas to test.

Be open-minded about testing.

Testing is an integral part of PPC. I'd even venture to say it's the most important element of a successful and continuously improving PPC campaign. Be willing to let your agency test things like:

- Out-of-the-box ad copy
- New keyword sets
- Landing pages – new pages or tweaks to existing pages
- Form fields – number of fields, data requested
- Checkout process
- Other channels such as the Google Display Network and social PPC

Remember the old adage about the definition of insanity: doing the same thing and expecting different results? Don't constrain your agency with closed-minded thinking. Allow them to test a few new ideas.

We've found that landing page testing can be a sticking point for advertisers. Web development resources are limited, and advertisers are reluctant to embark on what they see as a large dev project.

But landing page testing can be accomplished without involving your devs. Tools like Optimizely (www.optimizely.com) simply require a javascript code to be placed on your website, and then your agency can create tests themselves.

We've found even simple landing page tests such as changing a headline or call to action button text can yield conversion rate increases of 5-10% or more. Imagine increasing your sales or leads by 10% without spending another dime! Landing page tests are highly leveraged – take advantage of them.

Here's an example of how leveraged an improved landing page conversion rate can be:

	5% Conversion Rate	5.5% Conversion Rate (10% improvement)
Visits	10,000	10,000
Conversion	500	550
Average Sale	\$50.00	\$50.00
Revenue	\$25,000.00	\$27,500.00

50 more sales and \$2,500 in revenue per month, without spending a dime in advertising!

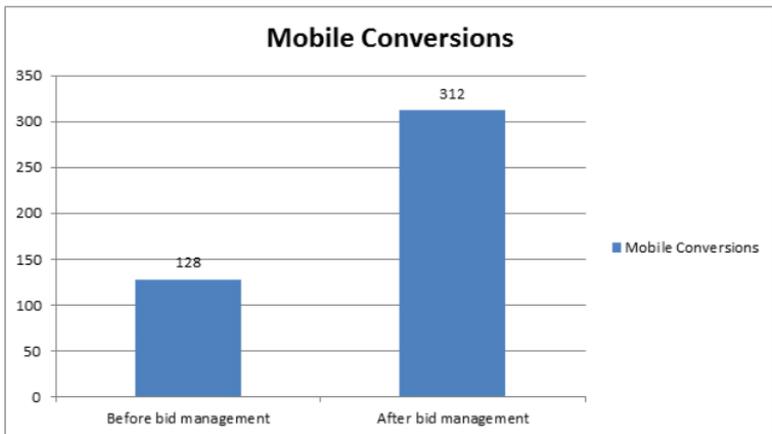
Be willing to invest in new technology.

Like an investment in testing, investing in technology usually pays big dividends. If your agency is not using bid management technology, ask them if they're willing to test a bid management solution. Using machine learning, bid

management technology can yield huge results with little to no time investment beyond setting them up.

Our clients have seen cost per conversion decreases of up to 40% from using a bid management solution – more than making up the cost of the tool.

Here's an example of the impact on conversions from mobile devices, before and after implementing a bid management solution. A 144% increase in conversions!



Ad copy testing technology also yields efficiency. Ask your agency about ad copy testing solutions like AdAlysis (www.Adalysis.com), which will automatically determine which ads are statistically performing best. Ad testing solutions can speed up your testing process and lead to better results faster.

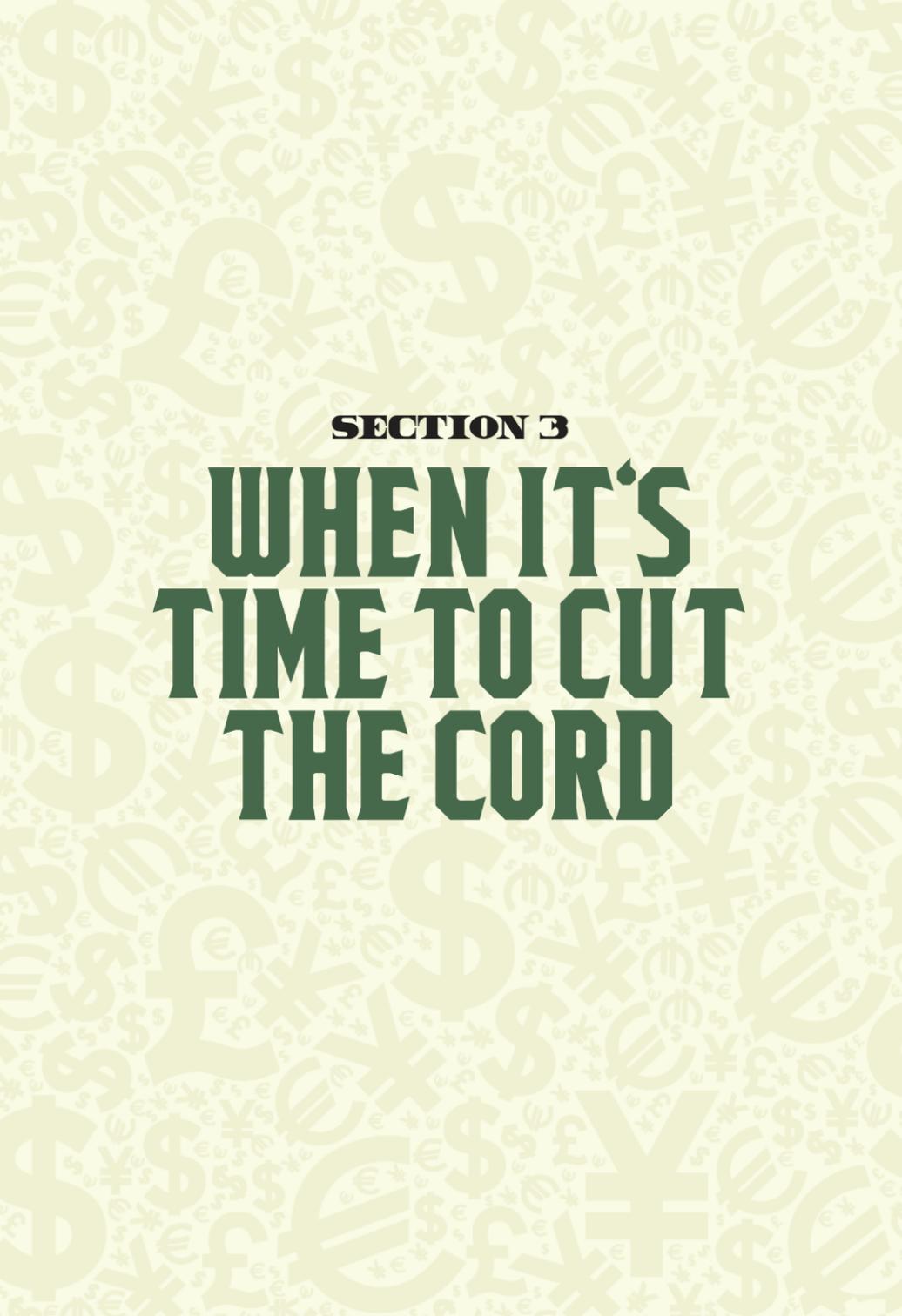
If you're a lead generation advertiser, think about solutions that can help your agency see results all the way through the

sales funnel. There are technologies that can pull your CRM data into Google AdWords or a bid management platform, allowing your agency to see which keywords and ad variations are generating not only initial form fills, but MQLs and sales. Optimizing through the full funnel will help boost your bottom line.

Smart businesses understand that the cost of technology will be more than recovered in increased profits.

Conclusion

A plateau in PPC results is no cause for panic. By understanding the normal fluctuations in PPC performance, working collaboratively with your agency, and being willing to invest in testing and technology, your business can continue to see improvements in results for years to come.



SECTION 3

**WHEN IT'S
TIME TO CUT
THE CORD**

CHAPTER 5

HOW TO FIRE YOUR PPC AGENCY

BY KIRK WILLIAMS, ZATO

If your agency isn't working out, here's what you need to think through with regards to timing and steps necessary before during and after you fire your PPC agency.

Step 1: Communicate, Communicate... Then Communicate Some More



Communication is the key to survival, but when friction enters a relationship, communication often decreases. Unfortunately, this is exactly when communication needs to be ramped up. I've found at times with clients, that the most crucial time for us

to be communicating the most heavily: when the relationship begins to dissolve.

The hard thing is that this requires awkward conversations. The upside is that ramping up communication will either solve the problem, or else validate your inclination to part ways.

I don't think it can be overstated that going slowly and making sure you have all the facts before making the decision is crucial here. Switching agencies is incredibly expensive, not to mention the time it takes to onboard and transition a new account manager(s).

Action to Take: Identify what is your core issue(s) with the agency. Bring it up to them respectfully and in a non-accusational tone before you are at the point where you are ready to fire them. Ask whether you are misunderstanding the situation. Allow plenty of time for back and forth, and even for them to change their behavior (if applicable).

It could be there is something about the situation you don't understand, and you'll never know if you don't communicate to them that you are frustrated so they can give a satisfactory explanation.

Step 2: Analyze the Agreement



If communicating your concerns still hasn't resolved the issue, the next step is to determine what would be required to legally allow you to exit the partnership. Review (or have your legal team review) the signed contract and begin the steps necessary to allow you to leave the relationship and meet the requirements of the contract.

As an example, there could be time constraints that would affect your ability to terminate the relationship. For instance, I have a required 30 Day Written Notice clause written into my contracts with clients, and it's likely you have something similar in yours with your agency.

Action to Take: During the communication stage, take the time to review your contract so you can be prepared if the time comes to meet the necessary requirements to allow you to legally exit the partnership with the agency.

Step 3: Begin the Research



Before you wave your current PPC agency out the door, it would be a good idea to have the next one lined up so you do not experience significant revenue drop from your ad campaigns.

At the point where communication demonstrates the relationship is beyond saving, begin reaching out to other agencies to gather proposals.

You need to make sure you are comparing apples to apples in agency types. That is, ensure that a prospective agency's scope matches what your current agency is doing in the account. As a simplistic example, if your current agency manages PPC and SEO and Facebook, ensure that you are not hiring an AdWords-only agency.

Action to Take: Shortly after the communication stage, begin researching and contacting alternate agencies that match the current agency's role (or better match your

expectations). Have the new agency ready to go before you fire the current agency.

Step 4: Leave on a Positive Note



Finally, it is time to notify your current agency of your intent to exit the relationship. As tempting as it may be, especially if emotions have risen during the communication process, keep a level head and don't burn any bridges. Remain professional, and submit a request to exit the relationship in writing with an end date that corresponds with the contract requirements.

Depending on the relationship at this time, it is recommended to either first notify the account manager by phone (or in person) before or after the written notice is sent. This can help give the agency a final chance to make amends, but it also ensures that your wishes have been communicated. The last thing you want is for an email to accidentally get sent to a spam folder for 3 weeks.

Once notice is given, either ensure the agency continues to manage the accounts for the remainder of the contract, or opt to immediately terminate their access while and pay them in full for the remainder of the contract requirements. Consult with your legal team to ensure you are taking the best route.

Whichever option you choose, make sure to terminate the old agency's access to your AdWords account once they are officially finished managing the account. While it would be unlikely, you want to avoid any temptation for a disgruntled former account manager to do harm to your account before access is revoked.

Action to Take: Submit written notice in a professional manner and confirm over the phone or in person. Ensure all final fees are paid and all contract requirements are met before revoking the old agency's permissions from all tools.

CHAPTER 6

HOW TO HIRE YOUR NEW PPC AGENCY

BY AARON LEVY

Hiring a new agency can be one of the toughest marketing investments you'll make. Not only do you need to review expertise and perceived performance, you have to account for culture fit, time investment, fee structure and more. It's crucial that you look at any new relationship as a true partnership (the agency is *not* a leech and the client is *not* getting in the way). You need to make sure that you're a fit for each other to ensure a fruitful relationship.

Having on boarded hundreds of clients in my career, I've identified five key factors to review during the agency selection process.

Expertise + Experience

First and foremost, the people who you speak with must demonstrate an ability to do their job well. The agency should

(at bare minimum) have their Bing + Google certifications. These are far from the end-all be-all - you'll have to do some due diligence to identify their skillset.

You're not paying for amateurs. The agency that you're reviewing should have a point of view for every change that could possibly affect your campaigns; they don't need to have an experiential answer, but you want to make sure your future partner is on top of their game. You need an agency that can roll with the punches, not an army of Chicken Littles.

Remember that years of experience may not be the best proxy for a skilled PPC manager. Focus on identifying how the agency conducts tests, how they react to negative (or positive) situations and their philosophies on core search principles. A few situational questions can go a long way.

- How does the team react to **industry changes**? Do they have a POV on the most recent changes made by Google? How do they make sure they stay on top of things?
- Does the team have **relevant experience** in your industry? While not a 100% necessity, the team should be able to translate their experience into your field. If your industry has legal restrictions, the team should know how to handle them.
- Are you paying for a **team of experts**, a team of interns or something in between? If you have a team who started in SEM in 1973, you're

overpaying for simple tasks. If you have a team of only junior talent, you're missing out on the value of an agency. Ideally the agency will have senior teams to captain the ship and more junior employees to row the boat.

Relationship + Time Investment

You need to make sure the agency's work style fits with yours. You'll remember above I cited that your contract is essentially a payment for time. You'll wind up paying both with money and time when styles don't mesh.

- Do you want a **high touch** agency, or do you want to hand off the reins and let go? While there are benefits to each side, know that your growth potential will be limited if you don't make a time investment in educating the team about your business.
- Do the **agency reports** fit what you need? Make sure to request a sample ahead of time to see what they share.
- Who do you call if there's **an emergency?** No agency will commit to 24/7 availability, but you should have someone you can reach if the house is on fire.
- Will the agency report on **their numbers or yours?** Share the numbers that are most important

to you during the pitch to make sure the agency can optimize on business metrics rather than clicks and conversions.

Technology Suite

A wise man once said “if the only tool you have is a hammer, everything looks like a nail.” Your team should be well versed in industry technologies to make sure they have the advantage at all times. You should have a clear understanding of the tools your team selects and how they can help you.

- How does the team **stay on top of competition?** Will they monitor using a competitive suite, or will they use Google’s free tools for cost savings?
- Does the team use a 3rd party **bidding platform?** If so, which one and why? What are the benefits to you as an advertiser? How the costs passed on? What is the teams relationship with the vendor? Are they tied to a tool for life, or are they constantly seeking **new opportunities?**
- Is the technology **homemade or licensed?** There are pros and cons to both, but every team member should know the answer to why the decision was made, and what the benefits of their choice is.

People + Passion

Culture fit is crucial for a strong relationship. Remember that 98% of the time, the agency will not be able to introduce you to the team for your account 3 months out (a healthy agency doesn't have dozens of AM's sitting around waiting for work). However they should be able to introduce you to a few "example" team members so you can get a feel for the types of people they hire.

- Does the team **communicate** in a way that will translate effectively to your organizational structure?
- What is the **team structure**? Will you have one point of contact at the agency, or many? Is there a single point of failure, or will you be okay if there's an emergency?
- Is the team **passionate and motivated** about the industry and your business, or will they clock out as soon as 5 PM rolls around?
- Does the team **love what they do**? Are they happy at their agency, or frustrated? You need to trust that you'll have stability in your team rather than a revolving door.

Pitch + Pricing

Any agency worth their salt will commit time to a presentation for incoming clients. Part of the pitch will be stock, and frankly

that's okay, but it should be tailored to your business. The sales pitch should be 50% about your company and 50% introducing the agency. Make sure to keep an eye on the following:

- Is the agency **stable + growing?** You don't need to find an agency that's been around for decades with a 10% CAGR. You don't want an agency that could disappear tomorrow either.
- Does the pricing structure benefit the **client and the agency?** Find something that fits your budget while keeping the agency motivated as well. While a flat fee sounds or % of revenue sound nice, they'll lead to a risk-averse agency unwilling to test. As you negotiate, remember you may have to give something up for cost savings.
- Did the team present a **path to the future** or look only at the past? Any agency can hand pick things that seem off in an audit; the strongest agencies say what they'll do to fix it.
- Was the pitch **only salespeople?** You can't expect an agency to have the team in the weeds, but it's important their voice is heard and is congruent with the message put forth.
- What is the agencies **reputation?** Did they provide **references?** If you can't find anything nice about

your future partner, chances are there aren't any nice things at all.

- Is the agency asking for a **relationship or a marriage?** While I understand the need for lasting contracts, I'd be wary of any agency that asks for more than a year commitment out of the gate.

This may seem like a lot to take in. It may seem complicated – it may seem like there's a lot at stake here and there's a lot of pressure on. From my years of experience, I can say every time a relationship felt right during the sales process, it **felt right** for the long haul.