

## CHECKLIST

# How to Choose a Public Relations & Marketing Agency

7 key points B2B tech companies should consider to ensure a long-term, successful relationship

Today, more businesses are embracing new media and technology-based marketing strategies than ever before. As Big Data, smart phones and social media revolutionize the way companies communicate and compete in the marketplace, traditional public relations and marketing tactics become even more vital to long-term goals. But, the way you use those tactics has changed drastically, so it's important that you find an agency with expertise in integrated PR and marketing services.

A nimble team of strategists can help you create a strong PR and marketing plan that directly impacts every stage of the marketing funnel by creating awareness of your company's product and services, driving high-value website traffic, and capturing and nurturing qualified leads to enrich your sales pipeline.

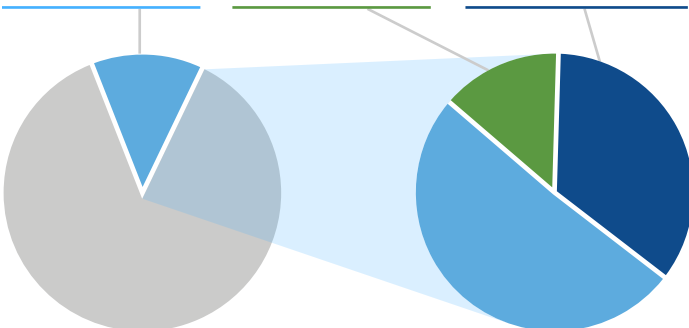
Finding an agency that fits with your company's culture, vision and style is critical. Here are seven key points to consider when selecting the best PR and marketing agency for your organization.

## How to Calculate the Right Budget for Outsourcing

B2B marketing budget = 10-15% of revenue

PR claims 14% of most B2B marketing budgets

26-40% of the marketing budget goes to content creation



Sources: [The CMO Survey](#) • [2018 B2B Marketing Mix Report](#)  
[B2B Content Marketing 2018: Benchmarks, Budgets, and Trends—North America](#)



## 1 Invest in Expertise without Breaking the Budget

Maximizing the return on investment of an integrated PR and marketing campaign is critical to your company's health and growth potential. But, how do you know what level of investment will deliver the quality you want at a price you can afford?

Large agencies command higher prices, but their formulaic approaches won't always provide value even if they have experts behind them. Startup agencies may say all the right buzzwords, but lack of experience limits their ability to prove their success with work samples. If you find a harmonious balance of high-quality work from a cost-effective, proven, small-to-mid-sized agency that can deliver on its deadline-focused promises, that's the sweet spot!

## 2 Prioritize Expertise over Lingo

An agency should possess a strong understanding of how PR and marketing fit into a company's overall sales strategy, as well as a client's specific business goals. Strategic initiatives should raise awareness and enhance the reputation of a company through a steady stream of positive news stories and a targeted content campaign that establishes thought leadership and persuades decision makers.

B2B technology and service companies face dramatically different challenges than their counterparts in the consumer market, so make sure the agency team understands the idiosyncrasies of B2B sales cycles. This team should be able to effortlessly articulate their PR and marketing expertise, as well as provide advice and proactively suggest effective strategies that complement your internal programs. But beware of jargon or "secret sauce" explanations. If an agency can't clearly and logically explain their tactics without getting caught up in opaque language or acronym double speak, send them packing and resume your search.



### 3 Look for Chemistry with Your Team

The agency you select should serve as an extension of your marketing team, seamlessly blending their expertise with that of your in-house experts. Ask yourself if the prospective agency will mesh with you and your team. Will they meld with your company culture? Is the agency comfortable with reaching out to other departments throughout the company (under your direction)? Think of the agency selection process less as purchasing a service and more as interviewing a new member of your team. Chemistry is every interviewer's illusive, but invaluable, success metric: use it to your advantage.

### 4 Ask about Longevity & Retention

Client turnover is a common occurrence among agencies, most often because the firm just "doesn't understand what we do." Look for a PR and marketing agency with a credible and lengthy track record of successfully representing other companies within your market space. Ask for references... and call them. A proven PR and marketing agency should happily offer references from several satisfied clients willing to share what the agency did for them and how long it took to gain traction with the media and increase their brand awareness. Find out if they are still working together. If not, would they consider engaging again in the future?

The agency that retains clients year after year proves that it not only does great work for its clients, but also shows that its teams are staying on top of market changes and proactively recommending new and innovative ideas to their clients.

### 5 Insist on Flexibility

Successful companies survive and thrive by recognizing changing market conditions and then quickly adapting to those changes. Whether it's an industry event, a marketplace shift or an internal course correction, your company needs a PR and marketing agency that's nimble and flexible enough to adapt its own strategy to keep up with your business and anticipate your needs. An agency that's small enough to be flexible but big enough to be effective can create the proper blend of strategy and tactics for every client project.

### 6 Seek Team Continuity

An agency relationship can create value greater than its individual parts. Your PR and marketing partner should recognize the power of this alignment by assigning a dedicated agent as your company's point person and not pull a "bait and switch" that entices you with the varsity all-star team, only to later call in the freshman practice squad for day-to-day projects. You need a constant, reassuring presence for your company. The best way to ensure this is to look for an agency that customarily assigns a permanent team with a primary point of contact, a strategic consult and a support staffer to work as an extension of its clients' internal teams. A stable, on-going relationship ensures business continuity between client and agency.

### 7 Make the Commitment

To get more responsive and personable service, look for a smaller PR and marketing agency that specializes in your industry. The team should make you feel like you are their only client and take a vested interest in aligning their efforts with your marketing goals. You don't want order takers, but rather a PR and marketing agency that produces results. For every decision, every recommendation, every press release or every campaign, your agency should have a pre-determined purpose and a desired goal outlined with measurable results prior to execution. When you've found the right firm for your company, embrace the relationship and commit to at least six months in order to see the real value the firm's team can bring to the table.

Interviewing and hiring the right PR and marketing firm is a formidable task, but armed with the right information and resources, it becomes an investment that will be repaid handsomely in time. Your primary goal should be to find a PR and marketing agency that not only lives and breathes in the ever-changing media industry, but also one that stays true to its own clearly stated philosophy, employs ethical tactics and recommends industry best practices.