

# Avoid an expensive mistake: *The paid media agency selection checklist*

15 questions to ask as you evaluate and select  
the right paid media agency partner.

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## INTRODUCTION

# Choose your paid media agency with clarity and confidence.

Choosing the right agency partner is one of the most critical strategic decisions you make. You want to be able to discern between a fantastic agency and a fantastic salesperson. Doing so is essential to avoid media budget waste, attribution complexity, channel fragmentation, and lack of strategic point of view.

The best practice to “shop agencies” from 10 years ago no longer applies. I’ve sat brand-side, agency-side, and at Google (publisher-side) over my 15-year career. Having seen agency partnerships from all perspectives, I want to help brands make the best choice. While many brands focus on budget, reputation, and core competencies as the starting point for evaluation, there is so much more to consider. Only someone who has a 360-degree view of the industry can provide that deeper layer of knowledge.

The 15 questions below are ones I use daily with my clients at JHM Growth 360. They are broken out into 5 key areas: **Contract & Ownership**, **Team & Expertise**, **Strategy & Philosophy Fit**, **Onboarding & Partnership**, and **Reporting & Operations**. You’ll also learn how to identify certain red flags. Every great agency should be able to answer all of these questions thoughtfully.

Our goal is for you to use this guide to prepare yourself and your leadership team to enter the RFI/RFP phase with potential agency partners. The guide can serve as an internal planning conversation tool as well as a key resource you can leverage in agency partner meetings. If you’d like to explore any of these themes further, email me at [jaclyn@jhmgrowth360.com](mailto:jaclyn@jhmgrowth360.com).

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## Contract & Ownership

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- 01** Do we (the brand/client) retain full ownership of all platform accounts (DSP/SSP, Google, Meta, etc.) created on our behalf?
  - 02** Can all media invoices from paid platforms go directly to our company’s AP? (Direct invoicing is strongly recommended for cost transparency.)
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## Team & Expertise

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- 03** Who specifically will be on our core team from pitch to post-sale? Please provide names, seniority levels, discipline/area of expertise, and years of experience for all dedicated personnel.
- 04** How many accounts are your senior leads and day-to-day POCs managing simultaneously? What is our account's priority tier amongst your portfolio?
- 05** What is the breakdown of true strategic marketers vs. platform executors on our account?
- 06** Do you ever use AI-generated or platform-native recommendations as a substitute for human strategy?

## Strategy & Philosophy Fit

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- 07** What is your paid media philosophy, and how do you build a marketing mix across lower-funnel performance, mid-funnel testing, and upper-funnel/emerging channels?
- 08** Walk us through your end-to-end testing methodology — from brainstorm to launch, measurement, and readout.

## Onboarding & Partnership

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- 09** What does your onboarding process and the first 12 months of partnership look like? What milestones, deliverables, and performance improvements should we (the brand/client) expect and by when?
- 10** Do you have in-house creative capabilities? If so, describe the brief process, turnaround times, revision rounds, QA process, and how incremental creative work is scoped and billed.

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- 11** Can you share case studies specifically relevant to our industry showing measurable performance improvement, including the ramp period before results improved?
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- 12** Will our account have an executive sponsor? If yes, what will be their involvement in our partnership?
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## Reporting & Operations

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- 13** Describe your reporting tech stack — what tools, what cadence, what is shared externally, and what role will AI play in generating or interpreting reports?
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- 14** What are your SLAs for common requests: ad hoc strategy briefs, annual planning, QBRs, new media builds, creative refresh executions, creative refresh recommendations, and audience list updates?
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- 15** What are your expectations for leveraging AI in our partnership — across media activation, creative testing, audience modeling, and reporting?
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## ADDITIONAL TIPS

## Red flags to investigate.

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- ! An agency insists all media costs are paid by the agency and then billed to the brand from the agency vs. the platform.
- ! An agency will not answer the question of how outsourcing/contractors play a role in their operations in your potential partnership.
- ! An agency will not provide you with a clear breakdown of fees, billing procedures, etc. during the RFP stage.
- ! An agency does not have numerous examples of proving incrementality for emerging technology/marketing campaign types.
- ! No member of the pitch team will be on the delivery team.

### Closing thought.

These 15 questions and red-flag tips arm you with authority in partnership pitches. Bringing them helps you instantly apply what I've learned over 15 years. Leverage this guide to dig beyond the rehearsed, scripted answers. I hope these questions give you confidence to execute RFI/RFP conversations. The process can feel overwhelming — but preparation is power.

### Take the first step in evolving your business.

Email [jaclyn@jhmgrowth360.com](mailto:jaclyn@jhmgrowth360.com) · Visit [jhmgrowth360.com](http://jhmgrowth360.com)

*Disclaimer: The content and words of this checklist were created by Jaclyn Howell McDougall of JHM Growth 360. The visual format and web hosting were done by Lovable.*