Choose with context. Start with clarity.

The Marketing Agency Selection & Proposal Comparison Workbook

A practical buyer toolkit for comparing scope, checking evidence, clarifying account access, defining acceptance tests, and making a documented agency decision.

01

COMPARE THE SCOPE

02

CHECK THE EVIDENCE

03

OWN THE DECISION

A buyer decision framework - not an agency ranking or results forecast.

WHAT YOU WILL LEAVE WITH

A buying brief. A proposal comparison. An evidence log. An access map. A pilot acceptance plan. A documented selection and handover decision.

Use the eight worksheets with marketing, sales, finance, and website owners. Complete one common brief before comparing providers; record unresolved items instead of guessing.

Numbers and situations are illustrative. The workbook is not a price benchmark, legal advice, or a promise of results. Primary references were checked on 24 November 2026.

READING OPTIONS

This PDF has selectable text, linked references, and section bookmarks. It is not a certified tagged PDF. The same content is available as a responsive HTML reader at adzup.in/whitepapers/marketing-agency-selection-proposal-workbook/.

01 / write the buying brief before the shortlist.

Use this workbook with the people who own marketing, sales follow-up, finance, and the website. The deliverable is a decision pack: a one-page brief, a comparable scope, an evidence log, an access plan, and an acceptance checklist. It is a buying framework, not legal advice, a pricing benchmark, or a promise of campaign results. The templates and examples are original AdzUp recommendations; cited sources support specific platform and review practices, not this scoring model.

Start with the problem you can describe in observable terms. Replace 'we need everything digital' with a bounded requirement such as 'we need a clear campaign and enquiry journey for one service, with reliable lead handoff and a review of lead quality.' Identify what your team can supply and approve. A provider cannot responsibly commit to a launch date while the offer, landing page access, and approval owner remain unknown.

Create two lists before evaluating anyone. Decision gates are conditions you will not trade away for a cheaper price: truthful claims, a workable access arrangement, a clear scope, and an acceptable data-handling approach. Preferences are things you can compare: creative style, relevant experience, communication rhythm, or production flexibility. Mark missing evidence as unverified rather than quietly treating it as a pass.

WORKING PROMPTS / COPY INTO YOUR DECISION PACK

- Copyable brief: We serve [audience] in [service area]. We need help with [one priority journey]. A useful enquiry means [criteria]. We can currently fulfil [capacity/constraints].
- Client inputs: [offer owner], [approved proof], [access owner], [sales owner], [approval availability]. Unknowns to investigate: [list].
- Decision gate record: condition | why it matters | evidence requested | pass / unresolved / fail | decision owner.
- Meeting output: one named decision owner, one scope baseline, and the same questions sent to every shortlisted agency.

DECISION / OWNER / NEXT EVIDENCE

02 / verify relevant proof instead of collecting logos.

Ask each provider to explain one relevant project from starting point to conclusion. Record who did the work, what the agency controlled, which period the evidence covers, and what was excluded. A screenshot without a date or an attractive client logo without an explanation does not answer those questions. A confidentiality limit can be legitimate; request an anonymised walkthrough, a permissioned reference, or a redacted deliverable rather than insisting on another client's private records.

Check credentials at their source and keep their meaning narrow. Google's Partner programme uses performance, spend, and certification categories. [1] That describes programme status; it is not an independent prediction of your commercial outcome or proof that the particular person assigned to your account has handled your exact problem. Ask how the proposed delivery team relates to the credential and verify current status where a verification route is available.

Treat reviews as evidence to understand, not decoration to count. The US FTC's review guidance discusses the need for genuine experiences and warns about paid comparison placements and misleading review practices. [2] It is a US source, not a conclusion about which law governs your purchase. As a practical buyer check, ask whether a quote reflects an actual engagement, what permission exists, and whether any connection or incentive could affect how you interpret it.

WORKING PROMPTS / COPY INTO YOUR DECISION PACK

- Evidence log: claim | original source or permissioned artefact | period | agency role | relevant similarity | limitation | verified by/date.
- Ask: Show one decision that changed during the project. What observation led to it, and what remained uncertain?
- Ask: Which named roles would work on our account, and which parts are delivered by subcontractors or external partners?
- Hold a claim as unresolved when the evidence is missing. Do not turn 'cannot disclose client data' into an automatic failure; evaluate the responsible alternative offered.

DECISION / OWNER / NEXT EVIDENCE

03 / normalize the proposals before comparing fees.

A low headline retainer can cover a narrower service than a higher quote. Build one comparison sheet with the same time window, currency, assumptions, and deliverable definitions. Separate agency fees, media paid to platforms, setup, creative production, landing-page work, tools, and client-side costs. Mark a line as included, separately quoted, excluded, or unclear. Do not silently assign a zero price to unclear work.

Illustrative arithmetic, not market pricing: Proposal A lists INR 40,000 monthly management, INR 20,000 setup, INR 25,000 page work, and INR 10,000 creative for each of three months. For the same three-month scope, known agency/production charges total INR 195,000. Proposal B lists INR 55,000 monthly including the page and creative, plus INR 15,000 setup: INR 180,000. These totals do not establish that B is better; confirm quantities, revision limits, ownership, exclusions, and all assumptions first.

If the example media allowance is INR 100,000 per month in each proposal, the comparison becomes INR 495,000 versus INR 480,000 before any applicable taxes or other costs. Media is shown separately so a buyer does not mistake it for agency income. Do not calculate an all-in commitment until cancellation, payment, tax, and supplier arrangements are confirmed by the responsible commercial people. A percentage-of-spend fee needs its calculation base and any minimum stated explicitly.

WORKING PROMPTS / COPY INTO YOUR DECISION PACK

- Comparison row: workstream | exact deliverable/quantity | client dependency | A inclusion/charge | B inclusion/charge | clarification needed.
- Define an asset: Does '12 creatives' mean twelve concepts, twelve resized variants, or a mixture? Define a page: design only, implementation, copy, hosting, testing, and revisions?
- Cost template: setup + (monthly service x months) + production + tools + other agreed costs. Keep media and applicable taxes on separate visible lines.
- Record each quote's validity, proposed start, approval dependencies, payment milestones, and change process without assuming they are identical.

DECISION / OWNER / NEXT EVIDENCE

04 / draw the access and ownership map.

Before onboarding, list the accounts and assets involved: ad accounts, business profiles, analytics, tag management, domain, website, CRM, creative source files, reporting, and billing. Separate legal ownership, platform administration, day-to-day permissions, and a contractual right to receive deliverables. Those are related questions, not interchangeable labels. Ask what remains available to your business if the engagement ends.

Google Ads documents distinct permission levels and different abilities to change campaigns, billing, product links, or user access. [3] Use the current platform matrix to choose the access actually needed. Do not assume that 'read-only' means no billing visibility, or that an agency manager link and direct administrator invitation have identical effects. A business-controlled administrator should review the requested arrangement before accepting it.

Use named invitations rather than sharing the owner's password. Identify the person who can approve access, a backup owner, and the removal process. For third-party accounts, verify recovery methods and billing arrangements through the appropriate platform controls. Keep credentials out of proposals, public worksheets, screenshots, and routine reporting. An inventory should record the owner and role, not the secret.

WORKING PROMPTS / COPY INTO YOUR DECISION PACK

- Asset inventory: system/asset | business owner | current admin | proposed agency role | why needed | recovery owner | export/handover plan.
- Access acceptance: client can sign in independently; requested role matches the task; recovery details are current; a business-approved backup is identified; invitations are recorded.
- Ownership question: Who receives editable design files, copy, campaign history, landing-page source, and documentation? What licences or supplier restrictions apply?
- Exit rehearsal: show how a business owner would obtain the agreed report and remove agency access without deleting active campaigns or unrelated user access.

DECISION / OWNER / NEXT EVIDENCE

05 / turn reporting promises into acceptance tests.

A proposal that promises 'tracking and reporting' needs a demonstration plan. Write down what counts as a form action, a received enquiry, a qualified enquiry, and a confirmed customer. Keep these separate from traffic and from projected pipeline. Choose the business system that supplies each operational outcome and the person responsible for maintaining it. An agency may report lead quality without being the team that answers the phone or updates the CRM.

Ask for a synthetic test using clearly labelled test information. Trace the intended path from the page to the receiving system and the report, with timestamps and expected states. For a WhatsApp handoff, a click or prepared message does not by itself prove a conversation was sent or received. For a server form, a success message should match an accepted record. This workbook's recommendation is to test what the business will rely on, not merely the appearance of a dashboard.

Agree how uncertainty is reported. An attribution model allocates credit; it does not establish that every counted conversion was caused only by the campaign. Ask which systems may disagree, how duplicates are identified, and which reporting windows and definitions will be used. Keep personal enquiry content out of general analytics exports and public acceptance evidence. Review data sharing separately with the appropriate privacy and implementation owners.

WORKING PROMPTS / COPY INTO YOUR DECISION PACK

- Metric dictionary: metric | plain-language definition | source | reporting window | exclusions | owner | known limitation.
- Acceptance test: action | synthetic inputs | expected screen state | expected receiving record | expected reporting state | evidence | reviewer.
- Test duplicate clicks, an omitted required field, an incorrect field format, and a failed external connection as separate paths. A failed test needs an owner and retest, not a green tick.
- Weekly review template: observed facts | unresolved records | lead-quality themes | proposed change | client action needed | decision/date.

DECISION / OWNER / NEXT EVIDENCE

06 / commission a bounded working phase.

A focused first phase can reveal how the teams work together without pretending to prove long-term return immediately. Define one audience, one offer, a small set of assets, and the acceptance evidence. Keep the scope paid and proportionate if it requires original production. Do not demand a complete unpaid strategy from every shortlisted agency and then compare how much speculative labour they provide.

An illustrative phase might cover one campaign concept, a destination-page improvement, an enquiry-path test, and a handover session. The learning question is whether the agency can explain decisions, make the agreed work, respond to useful feedback, and produce verifiable delivery evidence. If media testing is included, agree a budget, duration, and stopping process separately. A small or short sample should not be presented as proof of stable acquisition economics.

Define accessibility expectations at the beginning, not only after a page is built. W3C recommends including accessibility criteria in procurement and evaluating throughout delivery. [4] Ask what will be tested, who will test it, which limitations will be recorded, and how fixes will be retested. Do not accept an automated score alone as evidence of complete conformance. Include keyboard use, mobile form behaviour, clear feedback, and a usable reduced-motion experience in the appropriate test plan.

WORKING PROMPTS / COPY INTO YOUR DECISION PACK

- Working-phase brief: question to answer | deliverables | exclusions | inputs due | review dates | named reviewers | acceptance criteria.
- Revision record: version | feedback consolidated by | change requested | in/out of scope | decision | verification.
- Gate before launch: offer approved; claims evidenced; destination works; receiving team ready; required access confirmed; budget approval recorded; rollback or pause owner identified.
- Closeout: accepted work | remaining defects | lessons about collaboration | what additional evidence is needed before a longer commitment.

DECISION / OWNER / NEXT EVIDENCE

07 / run the reference call and score the evidence.

With permission, speak to a reference about an engagement that resembles your scope. Avoid requesting private commercial details or asking the reference to guarantee what will happen for your business. Useful questions examine how the provider handled ambiguity, approvals, and problems. Record what the reference directly experienced and what remains outside their knowledge. A friendly relationship is not the same as a comparable delivery record.

Score only after the evidence discussion. An illustrative rubric gives 25 points to scope fit, 20 to relevant evidence, 20 to delivery and measurement, 15 to access and handover, 10 to collaboration, and 10 to cost clarity. The weights sum to 100 but are not industry standards. Change them before seeing the final quotes if your priorities differ. A mandatory gate cannot be outweighed by points earned elsewhere.

Use ratings with defined meaning: 0 means not demonstrated; 1 means a material gap; 2 means partly evidenced; 3 means adequately evidenced for this scope; 4 means strong, relevant evidence. For each category, weighted contribution equals weight multiplied by rating divided by four. Keep the evidence note beside the number. Do not convert an unknown into an average score because it makes the table look complete.

WORKING PROMPTS / COPY INTO YOUR DECISION PACK

- Reference script: What scope did you actually buy? Who did the work? How were delays or mistakes handled? What information did you wish you had agreed earlier? What would you ask before starting again?
- Rating row: category | weight | rating 0-4 | weighted contribution | evidence/source | unresolved question.
- Illustrative calculation: scope fit weight 25, rating 3 gives 18.75 points. Evidence weight 20, rating 2 gives 10 points. Arithmetic is a discussion aid, not a forecast.
- Have reviewers score independently, then discuss meaningful differences. Preserve both the rationale and the final decision rather than hiding disagreement in an unexplained average.

DECISION / OWNER / NEXT EVIDENCE

08 / leave with a decision and an exit-ready handover.

Finish with one of four decisions: proceed, proceed after stated conditions, request targeted clarification, or do not proceed. Name the evidence that changed the decision. A conditional approval should list the unresolved item, the owner, the due point, and what happens if it is not resolved. Do not begin paid media simply because the sales discussion was positive while access, acceptance, or receiving-team readiness remains open.

Attach the agreed scope and comparison sheet to the decision record. Before signing, have the appropriate commercial or legal reviewer confirm payment, cancellation, intellectual-property, data-handling, confidentiality, and dispute terms for the actual business and jurisdiction. This workbook helps you identify questions; it does not establish contract rights or replace professional review. Keep final commitments in the accepted agreement, not scattered across calls and chat messages.

An exit-ready arrangement is a good start, not a sign of distrust. Specify the assets, documentation, access changes, outstanding work, and billing review needed when a project ends. Reconcile what can be exported and which licences cannot transfer. Make an orderly access change plan: preserve the business's own access, agree who may pause activity, and verify continuity before removing the provider. Never use deletion of campaigns or data as a routine handover step.

WORKING PROMPTS / COPY INTO YOUR DECISION PACK

- Decision memo: business need | candidates considered | gates checked | selected scope | evidence/rationale | conditions | approver/date | next review.
- Handover checklist: account inventory; agreed creative/source files; current campaigns and destinations; measurement definitions; known issues; latest report; licence limits; outstanding approvals; named owners.
- First review agenda: Was agreed work delivered? Did tests pass? What do lead-quality observations show? What changed in our business assumptions? What is the next owned decision?
- Retain a concise decision pack, not other clients' confidential data. Revisit the choice when the scope or delivery model changes rather than treating a historic score as permanent approval.

DECISION / OWNER / NEXT EVIDENCE

Sources and working context

The following primary sources support the specific background points marked [1]-[4]. The worksheets, cost examples, scoring weights, and acceptance templates are AdzUp editorial recommendations, not requirements or endorsements from the cited organizations.

Reviewed 24 November 2026. Platform permissions and programme criteria can change. Open the current official documentation before granting access or relying on programme status.

[1] Google Ads: How to become a Google Partner or Premier Partner

https://support.google.com/google-ads/answer/9702452?hl=en-en

[2] US FTC: Soliciting and Paying for Online Reviews - A Guide for Marketers

https://www.ftc.gov/business-guidance/resources/soliciting-paying-online-reviews-guide-marketers

[3] Google Ads: About access levels in your Google Ads account

https://support.google.com/google-ads/answer/9978556?hl=en

[4] W3C WAI: Planning and Managing Web Accessibility - Implement

https://www.w3.org/WAI/planning-and-managing/implement/

A better first conversation

Use this workbook independently or bring your brief and unresolved scope questions to AdzUp. You do not need to share passwords, other clients' confidential work, or sensitive lead data to discuss an initial project.

Explore a clearly scoped project: adzup.in/contact/

ONE QUESTION TO RESOLVE BEFORE YOUR NEXT AGENCY CALL