

A GUIDE FOR BUSINESS OWNERS

When You Should Vendor Out Your Marketing

Goal Clarity, Project-Based Thinking, and
Knowing What to Keep In-House

Outsourcing your marketing sounds simple until you're three agencies deep, burning \$15,000 a month, and can't explain what any of them actually do. This guide teaches you how to think about vendoring out marketing: what to outsource, what to keep, how to evaluate agencies, and how to stop wasting money on retainers that don't produce results.

Nick Irmo

irmomarketing.com

Digital Marketing Strategist & Creative Director

Before You Hire Anyone, Answer This

Most businesses outsource their marketing for the wrong reason. They don't outsource because they've identified a specific need a vendor can solve. They outsource because they don't want to think about marketing anymore. They want it off their plate.

That's how you end up paying an agency \$5,000 a month to 'manage your social media' while your pipeline is empty. The agency is doing the work. They're just doing the wrong work because nobody told them what the actual business goal was.

Before you talk to a single agency, freelancer, or consultant, answer these three questions:

1. What specific business outcome do you need?

Not 'better marketing.' Not 'more brand awareness.' A real outcome with a number:

- 'We need 30 qualified leads per month for our sales team'
- 'We need to rank on page 1 for our top 10 keywords within 6 months'
- 'We need a new website that converts visitors at 3%+ instead of 0.5%'
- 'We need an email system that nurtures leads so sales only talks to warm prospects'

If you can't define the outcome, you can't evaluate whether a vendor delivered. This is the single biggest reason agency relationships fail.

2. What has marketing looked like until now?

Be honest. Have you been doing nothing? Posting randomly on social media? Running ads without tracking? Has the CEO been doing all the marketing between everything else?

Understanding your starting point tells you whether you need someone to build from scratch, fix what's broken, or scale what's working. These are three very different scopes of work requiring three very different types of vendors.

3. What are you willing to own internally?

Marketing is not something you can fully hand off. Even with the best agency in the world, someone inside your company needs to:

- Approve creative direction and messaging
- Provide subject matter expertise and client stories
- Review and approve content before it's published
- Attend strategy calls and provide business context
- Give timely feedback (not three weeks later)

If nobody internally has 3-5 hours per week to manage the vendor relationship, the engagement will fail. Agencies execute. They can't read your mind.

The 30-Minute Marketing Audit

Before outsourcing anything, do a quick audit of where you actually stand. Score yourself on each area below. This tells you what to fix first — and whether you need a vendor, a hire, or just a better process.

Website & Online Presence

Score yourself 1-5:

- Is your website updated in the last 12 months? Mobile-friendly?
- Do service pages clearly explain what you do and who it's for?
- Can visitors contact you in under 2 clicks?
- Do you have client testimonials or case studies visible?
- Is Google Analytics installed and tracking conversions?

Content & SEO

Score yourself 1-5:

- Have you published new content in the last 30 days?
- Do you rank on page 1 for your primary service keywords?
- Do you have a blog or resource center?
- Is your Google Business Profile complete and active?
- Are you building backlinks through PR or guest content?

Lead Generation & Pipeline

Score yourself 1-5:

- Do you know your cost per lead by channel?
- Do you have at least one lead magnet or gated resource?
- Are leads entering a CRM automatically?
- Is there an email nurture sequence for new leads?
- Can you track a lead from first touch to closed deal?

Paid Advertising

Score yourself 1-5:

- Are you running any paid campaigns (Google, Meta, LinkedIn)?
- Do you know your cost per acquisition from paid channels?
- Are ads driving to dedicated landing pages (not your homepage)?
- Are you using retargeting for website visitors?
- Is someone reviewing and optimizing campaigns weekly?

Email & Automation

Score yourself 1-5:

- Do you send at least one email per month to your list?
- Do new contacts receive an automated welcome sequence?
- Is your list segmented by interest or behavior?
- Do you track open rates, click rates, and conversions?
- Are sales notified when a lead takes a high-intent action?

Social Media

Score yourself 1-5:

- Are you posting consistently on at least one platform?
- Does your content provide value (not just self-promotion)?
- Are you engaging with prospects and industry conversations?
- Can you tie any revenue back to social media activity?
- Are you using a scheduling tool and content calendar?

What to Outsource vs. Keep In-House

Not everything should be outsourced. Some things are better done internally, even if they're not your core competency. Here's the framework.

✓ OUTSOURCE THIS

- Technical SEO and site optimization
- PPC campaign management (Google, Meta, LinkedIn)
- Website design and development
- Graphic design and video production
- Marketing automation setup and configuration
- Advanced analytics and attribution modeling
- PR and media relations
- One-off projects with clear deliverables

✗ KEEP IN-HOUSE

- Brand voice and messaging decisions
- Content strategy and editorial direction
- Client relationship stories and case studies
- Social media engagement and community
- Sales-marketing alignment and lead handoff
- Vendor management and accountability
- Budget allocation decisions
- Final approval on anything public-facing

The Decision Framework

Outsource when it's a SKILL gap

You don't know how to run Google Ads. You can't build a website. You don't understand technical SEO. These are specialized skills that take years to develop. It's almost always cheaper and faster to hire an expert than to learn it yourself or train someone internally.

Keep in-house when it's a KNOWLEDGE gap

Nobody outside your company understands your clients like you do. Nobody can tell your story like you can. Nobody knows what makes a lead 'qualified' like your sales team does. These require institutional knowledge that vendors can't replicate.

Outsource projects, be careful with retainers

Agencies love retainers because they're predictable revenue. But retainers only work when there's genuinely ongoing work to be done. A website redesign is a project. Monthly PPC management is a retainer. But 'social media management' on retainer often becomes a comfortable arrangement where nobody's measuring outcomes. Be specific about what the retainer covers and what success looks like each month.

Think in Projects, Not Relationships

The most effective way to work with marketing vendors is project-based thinking. Even if you end up in a long-term relationship, start with a defined project so you can evaluate their work before committing to an ongoing engagement.

Phase 1: The Diagnostic Project (\$2,000-5,000)

Before any vendor does work for you, hire them (or someone else) to do a marketing audit. This is a one-time project with clear deliverables:

- Full audit of your current marketing channels and performance
- Competitive analysis of 3-5 competitors
- Gap analysis: where you are vs. where you need to be
- Prioritized recommendation roadmap with budget estimates
- 90-day action plan with specific milestones

This project tells you exactly what to fix first and gives you a document to evaluate any agency's proposal against. If an agency won't do this before jumping into execution, that's a red flag — they're selling hours, not outcomes.

Phase 2: The Build Project (\$5,000-25,000+)

Once you know what needs to be built, scope it as a project with a beginning, middle, and end. Examples:

- Website redesign with 15 pages, SEO optimization, and conversion tracking
- Marketing automation setup: CRM configuration, 5 email sequences, lead scoring
- PPC launch: campaign structure, ad creative, landing pages, conversion tracking
- Brand identity: logo, guidelines, templates, messaging framework

Define the scope, timeline, and deliverables upfront. Pay for milestones, not hours. A good vendor will tell you how long it takes and what it costs. A bad one will say 'it depends' and bill by the hour.

Phase 3: The Optimize Retainer (\$2,000-10,000/month)

Only after something is built and working should you move to a retainer for ongoing optimization. This is where retainers make sense:

- Monthly PPC management: bid optimization, new ad tests, budget allocation
- Ongoing SEO: new content, link building, technical maintenance
- Email marketing: monthly campaigns, sequence optimization, list management
- Analytics and reporting: monthly performance reviews, recommendations

The retainer should have clear monthly deliverables and KPIs. If you can't list what you're getting each month, the retainer is too vague.

How to Evaluate Agencies and Freelancers

Not all vendors are created equal. Here's how to separate the ones who'll deliver from the ones who'll drain your budget.

Ask for results, not capabilities

Don't ask 'What can you do?' Ask 'What have you done?' You want specific numbers: 'We took a B2B SaaS company from 50 to 400 organic leads per month in 8 months.' 'We reduced cost per acquisition from \$180 to \$65 for a professional services firm.' If they can't give you numbers, they don't track their own performance — which means they won't track yours either.

Check for industry experience (but don't over-index on it)

An agency that's worked in your industry will ramp up faster. But a great marketer in an adjacent industry is better than a mediocre one who 'specializes' in yours. What matters more than industry is understanding your business model: B2B vs B2C, long sales cycle vs short, high-ticket vs volume.

Understand their actual team

Who will do the work? Not the senior partner who pitches you — the actual human touching your campaigns daily. Ask to meet them. Ask about their experience. The bait-and-switch — senior pitch team, junior execution team — is the oldest agency trick in the book.

Evaluate their discovery process

A good vendor asks a lot of questions before proposing solutions. They want to understand your goals, audience, competitors, current data, and constraints. A bad vendor pitches their standard package regardless of your situation. If the proposal looks like it could apply to any company, it probably was written for one.

Start small before going big

Never sign a 12-month retainer with a new vendor. Start with a 90-day engagement or a single project. Let them prove themselves before you commit long-term. Any agency that requires a 12-month minimum is protecting their revenue, not your interests.

Require transparent reporting

You should see exactly where your money goes and what it produces. Monthly reports with: spend by channel, leads generated, cost per lead, conversion rates, and recommendations for next month. If the reporting is a PDF of vanity metrics (impressions, reach, followers), they're hiding behind noise.

Agency Red Flags That Should Make You Walk

'We need 6 months before you'll see results'

Some channels take time (SEO, content). But you should see *progress indicators* in 30-60 days: traffic trending up, leads starting to come in, campaigns live and generating data. If they're asking for 6 months of blind faith and a credit card, they're buying time, not building momentum.

They can't explain what they'll do each month

If you ask 'What does month 1 look like? Month 2? Month 3?' and the answer is vague, the scope is undefined. You'll be paying for effort, not output. Every month should have a clear list of deliverables and milestones.

They own all the accounts and logins

Your Google Ads account, your analytics, your social media profiles, your CRM data — these should all live in accounts YOU own. The vendor gets access. If they insist on running everything through their accounts, they're building lock-in so you can't leave without starting over.

The proposal is a template with your name filled in

If the proposal you received doesn't reference your specific goals, industry, competitors, or current situation, it's a copy-paste from their sales playbook. A real proposal is tailored to your business after a discovery conversation.

They guarantee specific rankings or lead numbers

No one can guarantee #1 on Google or promise you 100 leads per month before seeing your data. Honest vendors give you ranges, projections, and benchmarks — not guarantees. Guarantees are a sales tactic, not a strategy.

They resist performance tracking

If a vendor pushes back on setting up proper conversion tracking, attribution, or reporting, ask yourself why. The answer is usually that they don't want you to see what the money is actually producing.

Their only case studies are for themselves

If the agency's best proof of marketing effectiveness is their own social media following or their own website traffic, they haven't delivered results for clients. Marketing yourself is not the same as marketing other people's businesses.

The Vendor Evaluation Scorecard

Use this scorecard when evaluating agency or freelancer proposals. Score each factor 1-5. A vendor scoring below 30 should not get your business.

Evaluation Criteria	What to Look For	Score (1-5)
Relevant results	Specific, measurable outcomes for similar businesses	_____
Discovery process	Asked about goals, audience, data before proposing	_____
Proposal specificity	Tailored to your business, not a template	_____
Clear deliverables	Monthly outputs defined, not just "management"	_____
KPI commitment	Willing to set targets and be accountable	_____
Team transparency	You know who does the work and their experience	_____
Account ownership	All accounts and data owned by you	_____
Reporting quality	Clear monthly reports with actionable insights	_____
Contract flexibility	90-day trial or project-based before long-term	_____
Communication	Responsive, proactive, scheduled check-ins	_____
TOTAL (out of 50)		_____

How to use this scorecard

40-50: Strong candidate — proceed to 90-day trial

30-39: Acceptable with concerns — address weak areas before committing

20-29: Significant gaps — keep looking unless they address concerns convincingly

Below 20: Walk away — this vendor isn't ready to earn your business

How to Manage Vendors Without Micromanaging

Hiring the right vendor is only half the battle. The other half is managing the relationship so you get results without it consuming all your time.

Set the cadence on day one

Weekly 30-minute check-ins for the first 90 days, then shift to bi-weekly once they're up to speed. Monthly written reports with metrics, insights, and recommendations. Quarterly strategic reviews to reassess goals and adjust direction. Put it on the calendar before the engagement starts.

Define 'done' for every deliverable

Not 'manage our PPC' but 'launch 3 campaigns targeting [keywords], each with 5 ad variations, driving to a dedicated landing page with conversion tracking, optimized weekly against a \$45 CPA target.' Specificity eliminates misunderstandings and gives you a standard to hold them to.

Require access to all dashboards

You should be able to log into Google Ads, Analytics, your CRM, and your email platform and see exactly what's happening at any time. Don't rely solely on their reports. Vendors who resist transparency are hiding something.

Give feedback fast

When a vendor sends you content to review, an ad to approve, or a design to sign off on — respond within 48 hours. Slow internal approvals are the #1 reason agency timelines slip. If you can't give timely feedback, designate someone who can.

Fire fast if it's not working

If you're 90 days in and there's no progress, no clear data showing improvement, and the vendor can't explain why — end it. Don't wait for the 12-month contract to expire hoping it'll get better. It won't. Cut your losses and find someone who delivers.

The Honest Answer

Should you vendor out your marketing? Probably some of it. Here's the honest framework:

Yes, outsource if...

- You have a specific, measurable goal a vendor can be accountable for
- The work requires specialized skills your team doesn't have
- You have budget for both the vendor fee AND execution costs
- Someone internally can manage the relationship 3-5 hours per week
- You're willing to start with a project before committing to a retainer
- You've done a marketing audit and know what needs fixing first

No, don't outsource if...

- You can't articulate what you want the vendor to achieve
- You're outsourcing because you 'don't want to deal with marketing'
- You don't have budget for the vendor AND the execution they'll need
- Nobody internally will manage the relationship
- You've never done a marketing audit and don't know what's broken
- You expect to hand it off and forget about it

The bottom line

Outsourcing marketing works when you treat it like hiring a specialized team member: clear role, clear goals, clear accountability, regular check-ins. It fails when you treat it like paying someone to make a problem go away.

Define the goal. Start with a project. Measure results. Scale what works. Fire what doesn't. That's it.

About the Author

Nick Irmo is a Digital Marketing Strategist and Creative Director who has been on both sides of the vendor relationship — as an in-house marketer managing agencies, and as the vendor being hired. This guide is built on real experience evaluating, hiring, managing, and occasionally firing marketing agencies and freelancers across dozens of engagements.

The vendor evaluation framework and scorecard in this guide come from practical experience helping businesses find the right partners and hold them accountable for results — not just activity.

Website	irmomarketing.com
LinkedIn	linkedin.com/in/nickirmo

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