

Digital Agency Vendor Assessment Checklist

A structured evaluation framework for selecting a digital partner

31

Evaluation criteria

6

Capability areas

62

Maximum score

HOW TO USE THIS CHECKLIST

1. Score each criterion: 2 = Fully met 1 = Partially met 0 = Not demonstrated
2. Essential criteria (marked ★) carry additional weight — a score of 0 on these is a serious concern.
3. Total your score and refer to the interpretation bands at the end of this document.
4. Use the 'Red Flag' notes to identify deal-breakers that may override your overall score.

How to Use This Checklist

Selecting a digital agency is one of the most consequential investments your organisation will make in its digital capability. Yet most evaluation processes rely on polished pitch decks, curated case studies, and gut feel. This checklist gives you a structured, objective framework for evaluating any digital agency you're considering.

The criteria are organised into six capability areas that reflect the full scope of what a high-calibre digital partner should be able to deliver. You can use this checklist in two ways: as a guide for questions during the pitch and evaluation process, or as a scoring tool after each presentation to compare multiple agencies on a consistent basis.

The scoring system is intentionally simple: 2 points for fully demonstrated, 1 for partially demonstrated, 0 for not demonstrated. Essential criteria — marked with ★ — represent the baseline standards we consider non-negotiable.

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Section 1: Strategic Capability

A capable digital partner starts by understanding your business before recommending anything. These criteria assess how strategically oriented the agency is — not just whether they can execute tasks, but whether they think at the level your organisation requires.

#	Criterion	0	1	2	Notes
1.1	<p>The agency runs a structured diagnostic or discovery process before making recommendations — they don't propose solutions on first contact. ★</p> <p>■ <i>If they arrive at the first meeting with a solution already packaged, treat that as a red flag.</i></p>	■	■	■	
1.2	<p>They can articulate how their recommended activities connect to specific business outcomes (revenue, retention, risk reduction) — not just channel metrics. ★</p>	■	■	■	
1.3	<p>They have a documented strategic framework or methodology — not just a loose collection of services.</p> <p>■ <i>Ask them to walk you through how they approach a new engagement. Vague answers suggest they wing it.</i></p>	■	■	■	
1.4	They ask strategic, uncomfortable questions in the pitch process — about your objectives, constraints, and what has been tried before.	■	■	■	
1.5	They can produce board-ready reporting — executive dashboards, investment justification frameworks, ROI models.	■	■	■	
1.6	They demonstrate genuine sector awareness: regulatory context, competitive landscape, and audience behaviour in your industry.	■	■	■	
Section 1 subtotal:					___ / 12

Section 2: Service Depth & Integration

The most common agency failure mode is delivering isolated tactics that don't connect. A truly capable partner covers the full spectrum of what modern organisations need — and integrates those disciplines under one coherent engagement.

#	Criterion	0	1	2	Notes
2.1	<p>They can demonstrate genuine capability across all of: strategy, brand & communications, marketing & growth, technology & data, security & compliance, and creative & design. ★</p> <p>■ <i>Depth in one or two areas with surface-level coverage elsewhere is common. Ask for evidence of delivery across all areas, not just sales copy.</i></p>	■	■	■	
2.2	<p>Their services are delivered by a genuinely integrated team — not subcontracted to separate specialist firms with coordination done by a project manager. ★</p> <p>■ <i>Ask specifically: who delivers each discipline? Are they employees or subcontractors? Do they work together regularly or are they assembled per-project?</i></p>	■	■	■	
2.3	<p>They can operate simultaneously across strategy and execution — not just advise, and not just build. ★</p>	■	■	■	

#	Criterion	0	1	2	Notes
2.4	They have a connecting framework that explains how their service areas relate to each other and to your business outcomes.	■	■	■	
2.5	Accessibility (WCAG), cyber security, and compliance are treated as integrated practice areas — not bolt-on extras quoted separately. <i>■ In government and regulated industries, these are non-negotiable. An agency that treats them as optional extras will cost you more in remediation.</i>	■	■	■	
2.6	Their marketing capability is oriented around pipeline and qualified leads — not just traffic, impressions, or social engagement.	■	■	■	
Section 2 subtotal:					___ / 12

Section 3: Team Quality & Seniority

The people who pitch the work are rarely the people who deliver it. Seniority in the delivery team — not just in the boardroom — is one of the most reliable indicators of quality and accountability.

#	Criterion	0	1	2	Notes
3.1	The team that presents the pitch will be the team that delivers the work. This is confirmed explicitly, not assumed. ★ <i>■ The 'bait and switch' — senior partners in the pitch, juniors on the project — is industry-standard practice at many agencies. Ask directly.</i>	■	■	■	
3.2	Senior practitioners (not account managers or project coordinators) are involved throughout delivery — not just at project kickoff and review. ★	■	■	■	
3.3	Work is reviewed and quality-assured by senior practitioners before it reaches you.	■	■	■	
3.4	You can speak directly with clients who have completed similar engagements — not just receive curated testimonials. <i>■ Reluctance to provide direct references is worth noting.</i>	■	■	■	
3.5	The team holds relevant certifications and has demonstrated thought leadership in their fields.	■	■	■	
Section 3 subtotal:					___ / 10

Section 4: Process & Diagnostic Rigour

Good process is what separates agencies that consistently deliver from those that depend on heroics. These criteria assess whether the agency has systems that protect your investment — particularly when things get complex.

#	Criterion	0	1	2	Notes
4.1	They begin every engagement with a formal diagnostic across your current capability — identifying gaps and priorities before recommending actions. ★ <i>■ Skipping diagnosis to move faster to delivery is how you end up fixing the wrong things.</i>	■	■	■	

#	Criterion	0	1	2	Notes
4.2	They measure success across multiple dimensions — not just a single channel metric or vanity number.	■	■	■	
4.3	Their engagement process is documented and can be shown to you — not improvised.	■	■	■	
4.4	They surface risks and constraints proactively — including where your brief may be flawed or your expectations unrealistic. <i>■ Agencies that only tell you what you want to hear will eventually disappoint you on delivery.</i>	■	■	■	
4.5	They can offer a structured entry point — a defined diagnostic or program — so you can assess fit before committing to a long-term partnership.	■	■	■	
Section 4 subtotal:					___ / 10

Section 5: Commercial Terms

Commercial structures reveal how confident an agency is in their own work — and how fairly they intend to treat you as the engagement matures. Reasonable terms protect both parties.

#	Criterion	0	1	2	Notes
5.1	Scope, deliverables, and success metrics are defined in writing before engagement begins. ★	■	■	■	
5.2	Contract terms do not include excessive lock-in periods, automatic renewal clauses, or punitive exit provisions. ★ <i>■ Long lock-in periods often indicate low confidence in their own value. If they're good, they don't need to trap you.</i>	■	■	■	
5.3	There is a low-risk entry point — a defined discovery, diagnostic, or short pilot — so both parties can assess fit before committing to an ongoing investment.	■	■	■	
5.4	Pricing is transparent — you understand what you are paying for and why. There are no unexplained 'platform fees' or hidden retainer structures.	■	■	■	
Section 5 subtotal:					___ / 8

Section 6: Values, Ethics & Culture

A long-term digital partnership is a relationship. How an agency operates internally, and what they believe, matters — particularly when priorities shift, timelines compress, or difficult conversations are needed.

#	Criterion	0	1	2	Notes
6.1	Accessibility is treated as a baseline requirement — not an optional upgrade. WCAG compliance is standard practice, not a line item.	■	■	■	
6.2	They apply ethical design and communication practices — persuasion techniques are used to inform and engage, not to manipulate.	■	■	■	

#	Criterion	0	1	2	Notes
6.3	Communication is direct and proactive — you are informed of issues when they happen, not managed with corporate language.	■	■	■	
6.4	They will challenge your brief if they believe it is wrong — they prioritise outcomes over client approval. <i>■ An agency that always agrees with you is an agency that will never improve your results.</i>	■	■	■	
6.5	They have considered their own environmental and social footprint and can speak to it honestly.	■	■	■	
Section 6 subtotal:					___ / 10

Score Summary & Interpretation

Section	Title	Max	Your Score
1	Strategic Capability	12	___
2	Service Depth & Integration	12	___
3	Team Quality & Seniority	10	___
4	Process & Diagnostic Rigour	10	___
5	Commercial Terms	8	___
6	Values, Ethics & Culture	10	___
TOTAL		62	___

Score Interpretation

Score Range	Rating	Guidance
49–62	Exceptional	This agency meets the full standard expected of a senior digital partner. Proceed with confidence, ensuring onboarding is managed carefully.
37–48	Strong	A capable partner with minor gaps. Clarify weak areas before signing. Most organisations will find this a sound engagement.
26–36	Proceed with caution	Notable capability gaps. Consider whether the missing areas are critical to your objectives. May be appropriate for a narrow, well-defined engagement.
13–25	Significant concerns	Multiple gaps across key criteria. Proceed only if you have internal capability to fill the missing areas, with clear risk mitigation in place.
0–12	Not recommended	This agency does not meet the standard required for a significant digital engagement. We recommend reconsidering this option.

★ Essential Criteria Note: Any criterion marked with a star (★) that scores 0 should be treated as a significant concern, regardless of your overall total. These criteria represent baseline standards that a competent digital partner should be able to demonstrate. A high overall score does not compensate for a zero on an essential criterion.

About Liquid Digital Liquid Digital is a full-service digital agency serving enterprise and government clients across Australia. Our Framework for Digital Resilience maps capability across six integrated disciplines: Strategic Advisory, Brand & Communications, Marketing & Growth, Creative & Design, Technology & Data, and Security & Compliance. We offer a structured Digital IQ diagnostic as a low-risk entry point for new engagements. This checklist reflects the standards we hold ourselves to. We're comfortable being evaluated against it. liquiddigital.com.au