Considerations of Choosing a [BLANK]

Marketing Agency

Marketing Executive [MEET] Agency Creative



- Cross-Functional Marketing Executive
- 25+ years on client side, 5 years at agencies
- All areas of marketing from brand to demand
- INDUSTRIES: Technology, Software, Professional Services, Financial Services
- Trusted Advisor, Data Driven, Elicit Emotion, Ask Why?
- SUPERPOWER: Remaining the calmest person in the room



- Owner & Creative Director –
 CS Designworks
- 28th Year in Business, 6 yrs agency side
- Boutique full-service B2B agency
- INDUSTRIES: Commercial Real Estate, Finance, Technology, Private Equity, Commercial Services
- DELIVERING: Corporate Communications, Branding, Web, Digital Marketing, Swag
- SUPERPOWER: DESIGN THINKER

So Many Agency [TYPES] ...Yikes!



Which is the Right Door?

A Look Inside – Marketing [ROLES]

IN-HOUSE CMO MTG DIRECTOR **PRODUCT MKTG** PR **CREATIVE DIR. GRAPHIC DSR.** CONTENT EVENT PLANNER DIGITAL WEB MGMT MEDIA PLANNER RESEARCH



AGENCY ACCT MGR. CREATIVE DIR. COPYWRITER ART DIR. GRAPHIC DESIGNER **PROJECT MGR AD TEAM** SOCIAL DIGITAL WEB DEV MEDIA PLANNER SEO



So what is your [SITUATION]?

How to Choose the Right Agency?

How do you find the [BEST] Anything?



What are my [NEEDS] ?

IN-HOUSE

NEEDS ASSESSMENT

ASSESS CURRENT RESOURCES

PROJECT TYPE

RELATIONSHIP

INDUSTRY EXPERTISE

WHO'S WORKING ON MY PROJECT?



AGENCY CAPABILITITES ALIGNMENT

DEFINE PERFECT CLIENT

EXPECTATIONS

HONESTY

VALUE YOUR SKILLS

PERSONA ALIGNMENT

Where to find the [RIGHT] Agency/Client?

#1 REFERRALS

ONLINE SEARCH

INDUSTRY EVENTS

NETWORKING

REVIEWS

SOCIAL MEDIA

WEBSITE

Tips on working [TOGETHER]

DEFINE SCOPE OF WORK

CONCISE CREATIVE BRIEF

MEET WITH TEAM

BUDGET FINALIZATION

TIMELINE DEFINITION

MUTUAL RESPECT

OPEN COMMUNICATION / TRUST

Client and Agency [RED FLAGS]

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IN-HOUSE

OVER PROMISE

WHO'S WORKING ON MY PROJECT

MISSED DEADLINES

EXCUSE-ITIS

EGO-ITIS

CLIENT INDECISIVE

UNREASONABLE EXPECTATIONS

WHO'S MAKING DECISIONS

PROJECT CREEP

EXCESSIVE REVISIONS

MIKE PARADISO

MICHAEL.PARADISO99@GMAIL.COM

PHONE:

516-641-6453

LINKEDIN:

LINKEDIN.COM/IN/MICHAEL-PARADISO/

NICK CHIECHI

NICK@CSDESIGNWORKS.COM

WEB:

CSDESIGNWORKS.COM

PHONE:

212-679-1212

LINKEDIN: LINKEDIN.COM/IN/NICKCHIECHI/

at to C 1955 Warner Bros Anna PA

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