LoftyBiz Agency Question Sheet

Five questions to ask before you sign. Write the answers down. If an answer is still vague after you ask again, that tells you something too.

General business education, not financial, legal or tax advice. These are examples, not promises. Results vary.

About this agency

Agency name	
Date of meeting	
People you met	
Fee and term (write what they proposed)	

The five questions

Write the answers in your own words before you sign anything.

Question	What good looks like (examples, not promises)	Their answer
1. What will you report each month?	Ask for enquiries, cost per enquiry and booked work — not only impressions, clicks or rankings.	
2. Who owns the accounts and the data?	Every ad account, website login and data file should be in your name, with the agency added as a user.	
3. What is the notice period?	Prefer a short trial, then month-to-month, with about 30 days' notice. Be cautious of long lock-ins and 90-d	
4. Who does the work, and can I meet them?	Meet the person who will actually run the work, not only the person who sold it.	
5. What would tell us this isn't working?	Agree a yardstick you can both check (for example, enough enquiries to book a set number of consultation	

Your target for the first months (a yardstick, not a promise of sales)

What you will measure (enquiries, consultations, booked jobs)	
Number you would be comfortable with	
Cost you would be comfortable with	
When you will review it together	

Ownership and handover checklist

Item	Yes / No / Notes
Ad accounts opened in your name	
Website, domain and data stay in your name	
You have logins from day one	
Notice period written down	
If the goal is to train your team: a fixed term and a written handover (templates, style guide, notes)	
A second person in your business can cover holidays	

Worked example from the video (Ximena's kitchen renovation company — examples, not promises). The agency she chose reported enquiries, cost per enquiry and booked consultations; opened every account in her name; used a three-month start, then month-to-month with 30 days' notice; and she met the specialist who would run the ads. Fee: $2,000 a month plus about $1,500 in ad spend paid from her own account. Target: enough enquiries to book about six design consultations a month. These figures are examples only.

LoftyBiz 111 — Hire a Marketing Agency Without Getting Burned. loftybiz.net