

➤ EBOOK

When to Hire an Agency

A Guide for Marketing Teams at Small to Mid-Size Technology Companies





➤ INTRODUCTION

You have finite marketing resources.
Your teams have infinite expectations.
The right agency can help you satisfy both.

When your company is in growth mode and it's all hands on deck, there's no need to go it alone. The right agency partner gives you the breathing room and bandwidth to thrive. An agency with expertise in the marketing of B2B technology products and services can be invaluable, empowering you to differentiate your company effectively, reach the right decision-makers, and grow profitably in a fast-moving, highly competitive space.

This ebook gives you the insights you need to **determine the right time to engage an agency**, as well as what to consider beforehand, what to look for in a partner, and how to approach the relationship to achieve the best results. You'll also discover best practices for research, branding, content, and demand generation distilled from 20+ years of experience in B2B technology marketing.

Who This Guide is For:



Growing B2B
Technology
Companies



< \$500M
Annual
Revenue



Small
Marketing
Teams
(1-10 people)





This Guide Contains ...

- 01** When to Hire an Agency
- 02** What to Think About Before You Engage
- 03** Agency-Supported Marketing Initiatives
- 04** How Market Research Informs Strategies
- 05** When You Need a Unique Brand Identity
- 06** How to Capture Audiences With Content
- 07** Why Demand Gen Over Lead Gen
- 08** You Need an Agency That Gets You Like We Do





➤ CHAPTER ONE

When to Hire an Agency

Engaging an agency at the right time gives you the expertise, bandwidth, and strategic thinking you need to tackle short-term projects efficiently, manage evergreen assignments effectively, and get in front of what’s on the horizon. Here are some common scenarios that will help you come to a “when to hire” decision confidently.



Your team has been asked to do the impossible—and you’re not about to let them fail.

When high aspirations meet even higher expectations, a collaborative agency partner can give you the scalability and breadth you need to complement your team’s capabilities and the breathing room to do your best work in the areas in which you excel.

WHEN TO HIRE

As soon as you anticipate being stretched beyond what you can deliver.

Your company is going for broke, but it has no intention of breaking the bank.

When your company is making a bold move, such as an IPO or product launch, a strategic agency partner can help you assess business goals, align them with the most effective marketing strategy, and execute tactics that will give you

short-term wins balanced with long-term gains—all within your budget.

WHEN TO HIRE

As the business strategy is solidifying to ensure alignment and optimal marketing ROI.

There’s a seismic shift in the competitive landscape, but your resolve is unshakeable.

In the technology space, innovation is always on tap, and the competition is fierce. When you need to move quickly and confidently, an agency that’s “been there, done that” is invaluable. Their industry experience—including markets, customers, and competitors—empowers you to take on all comers, even when they’re coming on fast.

WHEN TO HIRE

Immediately, and consider a retainer in fast-evolving markets for maximum agility.

Investors are afoot, but your brand has a foot in the past.

With an investor infusion on the horizon, a brand refresh is often in order—but it needs to be strategic and meaningful to investors and customers alike. An experienced agency will assess your brand, refine what’s working, redefine what’s not, and polish it into a cohesive whole that puts your best foot forward. And they’ll give you an investor pitch that knocks their socks off.

WHEN TO HIRE

As growth begins to attract investor interest, and the brand needs to mature.



Specific expertise is required, but your team's knowledge and capabilities lie elsewhere.

Small marketing teams often comprise generalists and specialists, but they rarely have the luxury of high-level proficiency in all disciplines. A full-service agency with a team whose experience complements yours—and each other's—gives you the multidimensional flexibility to address any marketing challenge.

WHEN TO HIRE

When marketing challenges require skillsets your team doesn't possess.

A huge project, IPO, or customer event is on the horizon, but when it's done, it's done.

Excess capacity is expensive, but when you need it and don't have it, havoc ensues. Engaging an agency well-versed in the type of project at hand enables you

to scale up for time-critical and complex endeavors and then scale back down the moment they're complete. No need to add headcount to your staff.

WHEN TO HIRE

As the project comes into view, to ensure your agency resources are at the ready.

It's time to get serious about customer retention, but it's all you can do to move prospects through the funnel.

Balancing customer acquisition and retention is essential for companies offering complex solutions, products with long lifecycles, and XaaS on demand. Partnering with an expert in customer retention frees your team to focus on attracting new customers and moving them toward a purchase.

WHEN TO HIRE

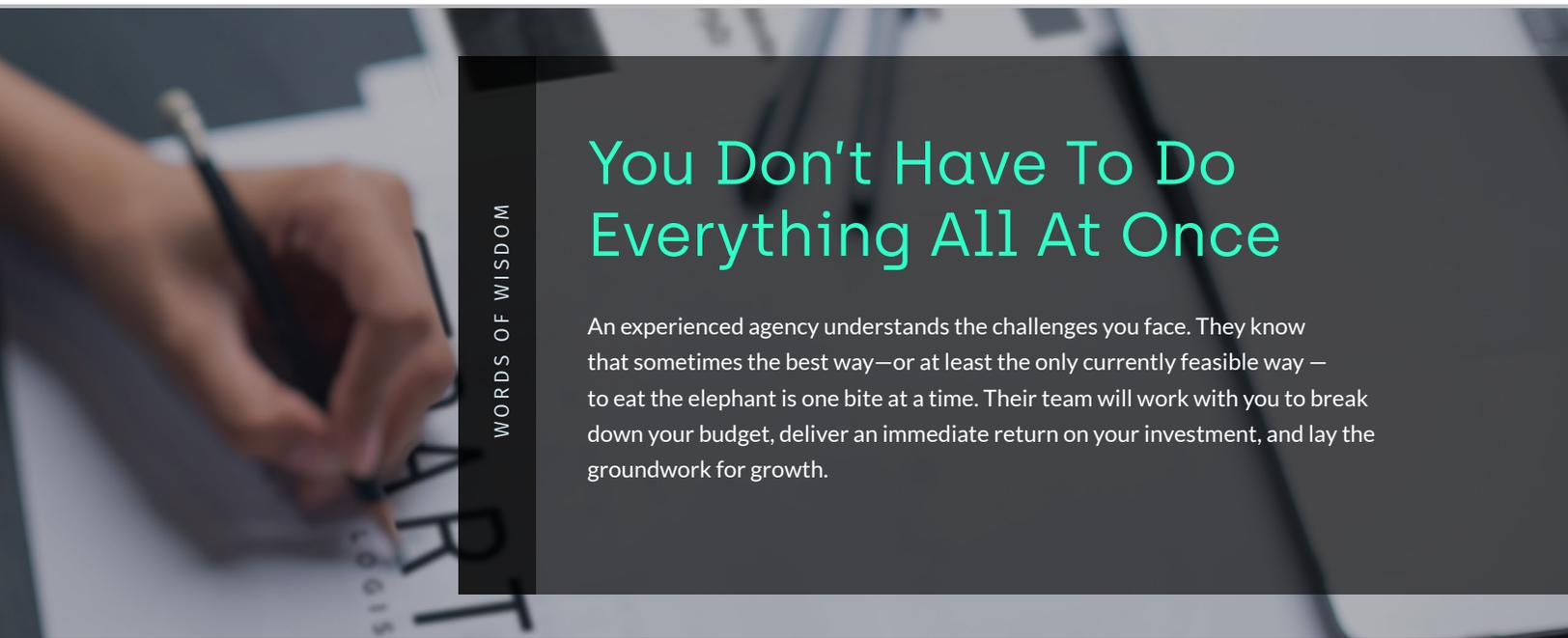
Once new customers are onboarded, to begin the work of building brand loyalty.

The website is up and running, but it's not optimized to perform as a true marketing asset.

Standing up an attractive website is often Job No. 1 for a growing company. It also tends to become a set-it-and-forget-it asset that gets lost in the cacophony as marketing shifts into high gear. An agency with website expertise can help you get found, stand out, engage visitors, and keep them coming back for more.

WHEN TO HIRE

As soon as you anticipate the need to drive traffic to your website.



WORDS OF WISDOM

You Don't Have To Do Everything All At Once

An experienced agency understands the challenges you face. They know that sometimes the best way—or at least the only currently feasible way — to eat the elephant is one bite at a time. Their team will work with you to break down your budget, deliver an immediate return on your investment, and lay the groundwork for growth.



What An Agency Brings To The Table

✔ Scalability

Adjust your team's bandwidth without staffing up or down

✔ Experience

Collaborate with a partner whose experience empowers you to aim higher

✔ Agility

Adapt effortlessly as business and customer needs shift

✔ Flexibility

Get the ROI you need now while preparing for the future

✔ Strategy

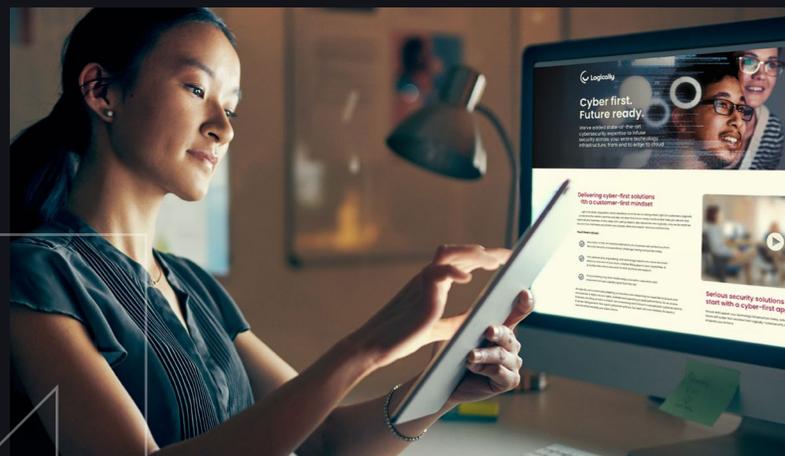
Engage with a partner whose clients include companies you're aspiring to emulate

✔ Best Practices

Ramp up faster with a team that knows what works

✔ Expertise

Fill gaps with seasoned professionals whose areas of expertise complement your own





➤ CHAPTER TWO

What To Think About Before You Engage

Marketing agencies come in all shapes and sizes. There are those that focus on consumer marketing and those whose forte is B2B. There are generalists and specialists by industry and by marketing discipline. There are strategic partners, production houses, and combinations thereof. There are agencies that are a good fit for your team and your goals, and those whose style, domain, and areas of expertise suit others better. And there is one that is precisely right for you.



10 Questions to Contemplate Before You Start Your Search

A clear-eyed assessment of your company, marketing strengths, and agency expectations will prepare you to have the most meaningful conversations with prospective agency partners. Here are a few questions to consider as your research commences.

Business Strategy

- 01 What is our company's vision, and what is the strategy for achieving it?
- 02 What short- and long-term business goals have been established to achieve the vision?
- 03 What expectations have been placed on my marketing team in service of those goals?

Marketing Team

- 04 What are my marketing team's strengths, and where do we have gaps?
- 05 What is the specific challenge we are trying to address by hiring an agency?
- 06 How do we want to augment our marketing team to best support the company's strategy?

Agency Relationship

- 07 How well do I expect an agency to understand my industry, company, and customers?
- 08 What type of relationship do we envision having with our agency?
- 09 What does success look like, and how will we measure that?
- 10 What is our budget for an agency engagement?

Envisioning The Relationship

Here's some food for thought.

Once you're ready to hire an agency, give some thought to how you want that relationship to function. Every agency has its own strengths and approach to client relationships. Kindred spirits get things done—make sure your expectations and preferences are in sync.

The agency is well respected—but they only have a passing knowledge of your industry.

Getting up to speed in a complex, fast-moving industry takes time. The stakes are high because you are making a financial investment, and there are no shortcuts. Ideally, the agency you choose will already understand your specific industry's competitive landscape, buyers and buying cycles, and the marketing strategies and tactics that deliver results. You'll know if they ask the right questions.

WHAT MAKES IT WORK

Industry Expertise

The agency has done some incredibly creative consumer marketing—but that's not what motivates your decision-makers.

B2B technology buyers are savvy. They're not looking for bells and whistles; they're looking for solutions to the real-world business challenges their company faces. Creativity shines, but it doesn't supplant the need for marketing that speaks directly to their concerns in a language—visual and content—that says “we understand your business and respect your role in its success.”

WHAT MAKES IT WORK

Audience Familiarity

The agency does a few things very well—but they lack expertise in key areas you need to be most successful.

Marketing strategies incorporate several tactics. With expertise and experience across a breadth of disciplines, a full-service agency will look at your opportunities through a holistic lens, challenge your thinking, and bring forth fresh ideas in a way that more focused agencies simply can't. They'll help you aim higher.

WHAT MAKES IT WORK

Holistic Thinking

The agency has experience with companies similar to yours—but not with those you aspire to be.

There is wisdom in experience. An agency that's done exceptional work for companies more established or successful than yours knows what works and what doesn't. They also know how to experiment effectively. They'll steer you in the right direction, measure what matters, and course correct thoughtfully.

WHAT MAKES IT WORK

Experience

The agency is successful—but their definition of success doesn't match yours.

Nothing derails relationships faster than a lack of mutual understanding. Experienced agencies will ensure you're measuring progress in the right way, and they'll arm you with the information you need to fend off capricious expectations. They'll be meticulous in their conversations because their #1 goal is to make sure you're successful.

WHAT MAKES IT WORK

Clarity

The agency comes across professionally—but they're hard to reach.

The success of any agency/client engagement rests on the parties' willingness to connect in a way that works for both. The right agency will adapt effortlessly to your preferences and cadences. They'll also make themselves available when needed—a courtesy you'll return with timely information, honest conversations, and thoughtful questions.

WHAT MAKES IT WORK

Accessibility



How To Get The Most Out Of Your Agency Partnership

Success is a shared responsibility. There are lots of “Be’s” in this hive.

Here’s how to make the most of your engagement:

Be Transparent

An agency can only support your needs if you’re honest with them about your challenges.

Be Thorough

Give your agency as much relevant data, information, viewpoints, and insights as you can.

Be Precise

Define what you’re solving for. For instance, is it a business, sales, product, or market issue?

Be Focused

Articulate who your buyer is and what motivates them to purchase.

Be Organized

Cultivate helpful background materials, provide timely feedback, and keep your stakeholders informed.

Be Realistic

Set your team and your agency up for success with realistic timelines and budgets.

Be Strategic

If the business is still in a state of “thinking it through,” your marketing will be chaotic.

Be Savvy

Get internal stakeholder buy-in early on so you don’t have to defend your choices later on.

Be a True Partner

Your agency will do its best work when you treat them like a partner, not a vendor. Honor their expertise.



WORDS OF WISDOM

Time Is Money— And So Is Experience

Agency pricing varies widely. Before saying “yes” to an agency, be sure you understand why they charge what they do. It often comes down to experience. While experience can cost more upfront, it may be the wisest choice when you consider the accuracy, quality, speed, and effectiveness that come with it.



Agency-Supported Marketing Initiatives

RESEARCH | BRANDING | CONTENT | DEMAND GEN

Priority Marketing Initiatives Tailored, Customized, Personalized

B2B tech buyers want meaningful data and information that empowers them to make informed decisions. Research-driven branding, content, and demand generation initiatives enable marketing teams to meet their goals and sales contribution targets. We strongly believe that doing them well, with the assistance of an experienced agency partner when required, can help you deliver on your promises.

Why Research?

Gain deep insights into your buyers, opportunities, and competitors to target prospects effectively.

83%

Percent of customers that are willing to share their data to create a more personalized experience²

42:1

Ratio of ROI generated by brands that use dynamic content versus 21:1 for those that don't²

Why Branding?

Develop a brand identity that conveys trust and expertise while being uniquely suited to your company.

86%

Percent of consumers that prefer an authentic brand image and honest personality on social media⁵

50 msec.

Time it takes for a visitor to form an opinion about your website that determines whether they'll stay or leave⁴

Why Content?

Deliver strategic, high-value content that galvanizes prospects, accelerates decision-making, and inspires loyalty.

58%

Percent of marketers say content marketing is their top budget priority¹

3X

Leads per dollar spent for content marketing vs. paid search efforts

Why Demand Gen?

Deploy the most effective strategies to build brand awareness and create demand for your products and services.

9

The number of campaigns per quarter marketers typically plan to launch in 2023²

95:5

Only 5% of customers are ready to buy at any given time. Demand generation builds trust with the other 95%.

1. Demand Gen Report, 2022 Demand Generation Benchmark Survey sponsored by On24
2. HubSpot, The State of Marketing – Marketing Trends in 2023, from AI to Z
3. Semrush, 100+ Eye-Opening Content Marketing Statistics for 2023, February 22, 2023

4. Gitte Lindgaard, Gary Fernandes, Cathy Dudek & J. Brown (2006) Attention web designers: You have 50 milliseconds to make a good first impression!, Behaviour & Information Technology, 25:2, 115-126, DOI: 10.1080/01449290500330448

5. HubSpot, The Ultimate List of Marketing Statistics for 2022



Research – Insight To Inform Your Strategy

Come intrigued. Leave informed. Market confidently.

Why invest in research when there are so many other demands on your marketing resources? Precisely for that reason. When you're able to clearly articulate your goals and the insights you need to reach them, marketing becomes an exercise in precision, not a game of chance. That's especially important in tech, a crowded, competitive, and often commoditized industry where decisions are made by committee and buyer journeys are measured in months, not days.

But many small marketing teams don't have the time, bandwidth, or access to data they need to do research justice—even when they understand how critical it is to effective marketing. That's where an agency with proven research processes comes in, providing a thorough analysis of the market, competitors, audiences, and opportunities that enable you to target precisely for optimal results.

When Research is of the Essence

The best time to engage in research is before—before a launch, before a competitor takes aim, before an impactful event—but it can also be invaluable when course correction is needed. A few examples:

- ✔ Your company is anticipating a significant change in strategy
- ✔ Customer churn has increased and you need to pinpoint the reason
- ✔ You plan to launch a new product, service, or solution
- ✔ A new competitor has entered the market
- ✔ An IPO or acquisition is on the horizon and you want to understand how stakeholders will react
- ✔ A current competitor is launching a solution aimed at your target audience
- ✔ Sales have declined and you're not sure why



When you're able to clearly articulate your goals and the insights you need to reach them, marketing becomes an exercise in precision, not a game of chance.



Three Questions

to Help Focus Your Research Project With an Agency

01

COMPETITIVE LANDSCAPE

How well do you know your competitors?

The insights:

- What competitors are doing well
- How you can position differently where you have unique value
- Where you can capture undiscovered or underplayed opportunities
- Emerging threats that may impact sales

02

BUYER PERSONAS

Who buys from you, and who influences that decision?

The insights:

- The stakeholder ecosystem—users, influencers, and decision-makers
- Their aspirations and what's getting in their way (pain points)
- What they need to know to make a confident decision, and when they need to know it
- Deal breakers and why they would choose a competitors

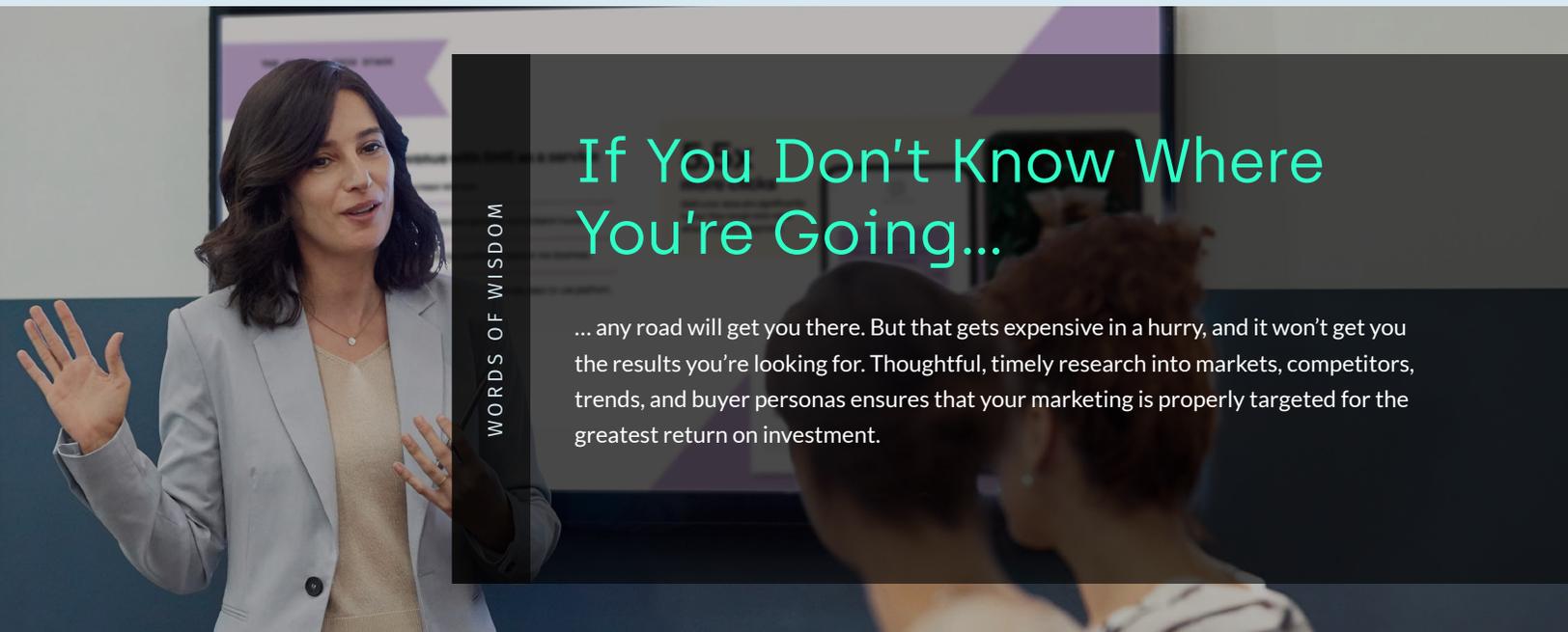
03

MARKET SEGMENTATION

Are the markets you serve best suited to your offerings?

The insights:

- What competitors are doing well
- True opportunity within target, complementary, and untapped markets
- Audience size, scope, and financial wherewithal
- The best strategy to achieve your business objectives



If You Don't Know Where You're Going...

... any road will get you there. But that gets expensive in a hurry, and it won't get you the results you're looking for. Thoughtful, timely research into markets, competitors, trends, and buyer personas ensures that your marketing is properly targeted for the greatest return on investment.



Branding – Creating A Unique Image

Stand out. Stand for something. Standardize.

In the crowded and highly competitive tech market, a well-thought-of brand that stands out can instantly open the door to sales conversations that might otherwise take months to book. But it's not enough to be visually appealing. The brand must convey what you're selling and what makes you unique—and it has to do so in a way that is meaningful to your target audience.

B2B tech audiences are savvy, and they're not into impulse purchases. Their company's success often depends on the choices they make, and they can spot disingenuous marketing a mile away. Building a brand identity is an exercise in intention best accomplished by a skilled and strategic creative team that understands your industry, your business, and your customers.

The Right Time for Branding

Rebranding is an opportunity to refine, reframe, and refresh in a strategic way. Consider a rebrand when:

- ✔ Your start-up is preparing for an IPO and needs a more credible, professional presence
- ✔ Your company lacks brand awareness, or the perception of your brand is misaligned with the market
- ✔ You are gearing up for a high-visibility event or campaign, and you want to stand out
- ✔ Your brand identity is no longer true to the essence of your company
- ✔ Your company's strategic direction, served markets, or target audiences are evolving
- ✔ A merger or acquisition will require bringing two companies together or rethinking the brand hierarchy



Building a brand identity is an exercise in intention best accomplished by a skilled and strategic creative team that understands your industry.



Brand Identity: What To Look For In An Agency

A powerful brand identity that conveys strength, trustworthiness, and know-how paves the way for effective, cost-efficient marketing campaigns.

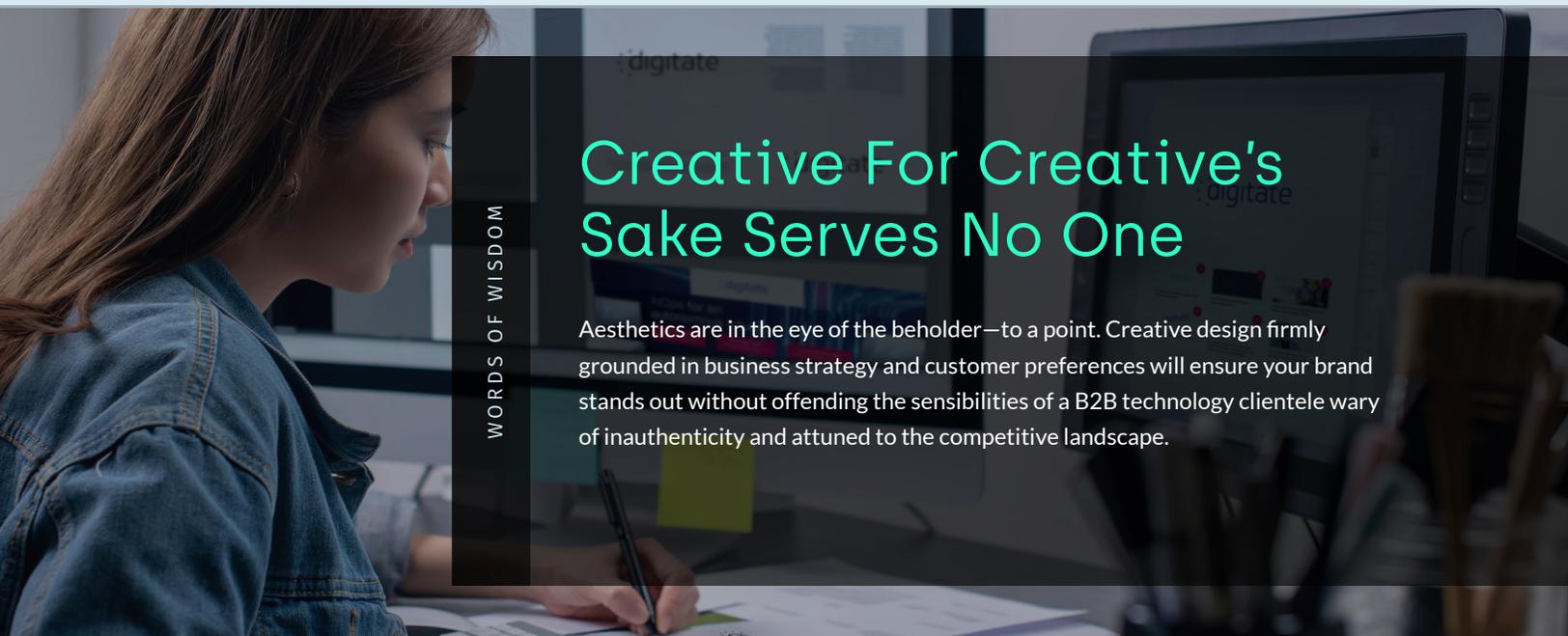
Look for a strategic, creative agency partner that offers:

- ✔ Deep understanding of your industry, customers, and competitors
- ✔ Business prowess that enables them to tie company strategy to brand identity to build credibility
- ✔ Mastery of all things brand, from logos and visual elements to animation and asset development
- ✔ Respect for brand standards in service of the business, not individual preferences or fleeting market reactions
- ✔ The ability to present established brands in innovative ways without alienating stakeholders
- ✔ The expertise to quickly identify opportunities for improvement and execute them incrementally to reach full expression
- ✔ A knack for distilling inspiration, ideas, and opinions into a cohesive whole whose essence captures the best of all of them
- ✔ Purity of decision-making that neutralizes biases and political influence to deliver the best outcome
- ✔ Established relationships with trusted creative partners whose capabilities complement the agency's talents



Rise above the ordinary even in the most competitive markets.

[DISCOVER BRAND GPS +](#)



WORDS OF WISDOM

Creative For Creative's Sake Serves No One

Aesthetics are in the eye of the beholder—to a point. Creative design firmly grounded in business strategy and customer preferences will ensure your brand stands out without offending the sensibilities of a B2B technology clientele wary of inauthenticity and attuned to the competitive landscape.



Content – Captivate Your Audience

Stand out in a sea of similarity.

It sounds straightforward—connect with audiences in each stage of the buyer journey with content that moves them toward a purchasing decision. But straightforward rarely means simple, especially in tech where products are complex, buying cycles are long, and purchasing decisions are a group affair. Establishing messaging that is consumable, extendable, and effortlessly scalable empowers marketing teams to execute with speed while ensuring content is always in sync with business strategy and brand identity.

An agency that understands your industry and speaks the language of your customers is invaluable. Their expertise saves you time and money on ramp-up so you can avoid the pitfalls of misinformation with a tech-savvy audience. That’s especially important since most decisionmakers do the majority of their research before they ever contact a salesperson. A seasoned agency can differentiate your solutions in a way that works for your audience.

The Right Support

Engaging an agency has its benefits, whether you are establishing a brand identity, looking for fresh ways to present solutions, or building out a content library – The right agency can help you:

- ✔ Establish a concise messaging framework that serves as a touchstone for your brand across audience
- ✔ Define your buyers and their specific needs so every asset has a purpose and achieves the desired outcome
- ✔ Develop innovative content such as gamification, interactive infographics, and video series that fuel the imagination
- ✔ Capture the attention of self-educating buyers with strategy-driven content programs
- ✔ Assess current messaging to ensure the right information is delivered in the right way at the right time
- ✔ Establish or amplify a social media strategy to increase brand awareness and drive more traffic to your website



An agency that understands your industry ecosystem and speaks the language of your customers is invaluable when it comes to your content strategy.



Beyond the Funnel: Content For Retention And Sales Enablement

Content for awareness, consideration, and decision-making is just the start. Sales enablement and customer retention materials help close deals and extend profitable relationships.

Consider hiring an agency to augment your content strategy with:

Customer Retention:

- ✔ Email Newsletters
Keep your audiences engaged and in the know
- ✔ Product Guides
Enable customers to get the most out of your solutions

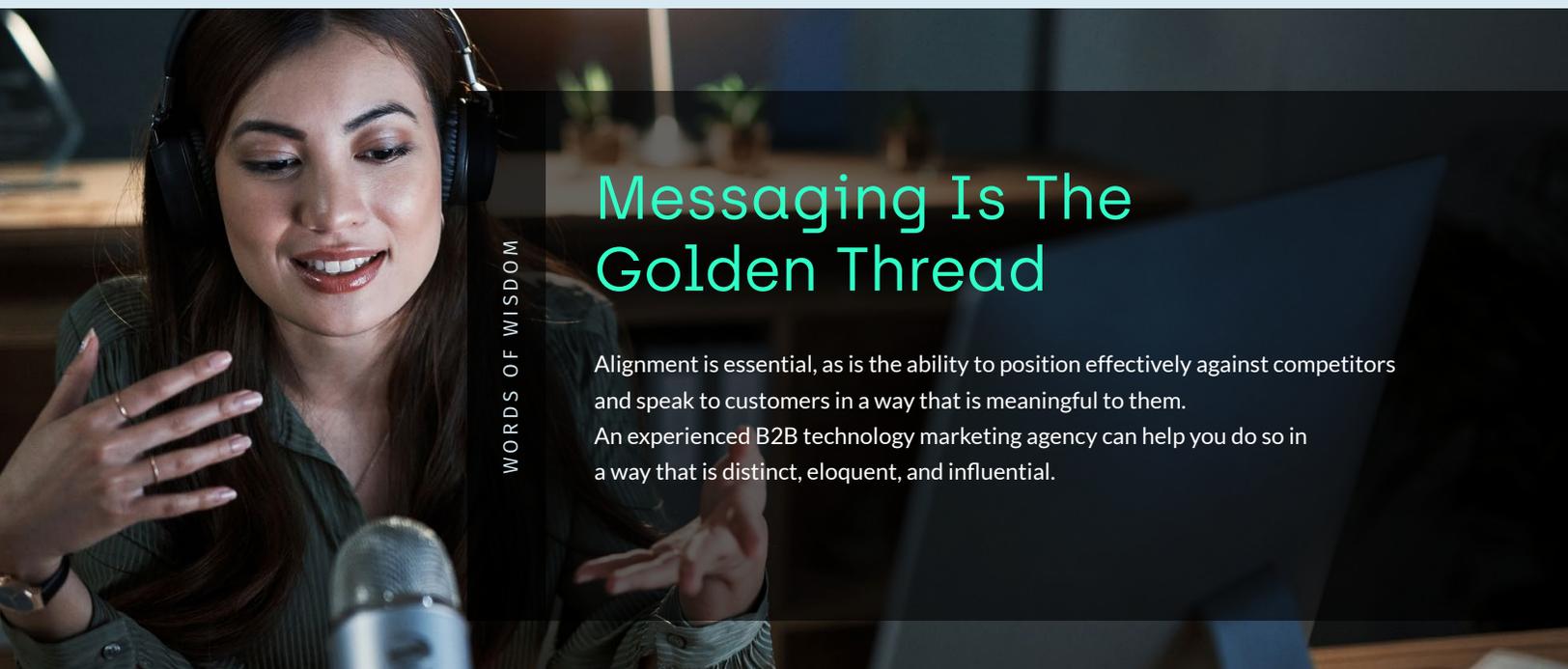
Sales Enablement:

- ✔ Sales Tools
Develop an “insider outsider” visual persona
- ✔ Online Playbooks
Drive a fast, yet confident, decision
- ✔ Sales Plays
Deliver a full visual identity package
- ✔ Communication Series
Focus on intriguing use cases and the functionality that made them innovators



Navigate buyer preferences and captivate your audience.

[LEARN ABOUT CONTENT GPS +](#)



WORDS OF WISDOM

Messaging Is The Golden Thread

Alignment is essential, as is the ability to position effectively against competitors and speak to customers in a way that is meaningful to them. An experienced B2B technology marketing agency can help you do so in a way that is distinct, eloquent, and influential.



Demand Gen – Build A Pipeline Full Of Potential

Capture. Nurture. Convert.

In an ultra-competitive and saturated market where differentiation is crucial, B2B marketers face intense pressure to deliver qualified leads. There are many ways to get it done, from paid media and marketing automation to intent data and gamification. But marketing teams are often stretched to their limits, and lead gen is just one of their many responsibilities. Partnering with a full-service agency

not only brings you expertise in lead generation, it also gives you a team of professionals in complementary demand gen disciplines such as brand identity, content, and research that enhance your ability to attract customers and drive them toward a purchase.

Timing It Right – Four Questions

Demand gen is a multifaceted discipline. Agency pros who understand the ins and outs in a complex landscape can help you build a pipeline of qualified leads faster than your team can alone. Here are some questions to ask to help you determine when to engage.



01 Are your search engine and website metrics declining?

Search engine optimization (SEO) is a moving target. The rules are constantly being rewritten across every platform. Keeping up with changes in real time is the difference between getting found and getting outplayed by competitors.

02 Is your paid media strategy really paying off?

Paid media is an exercise in spending money wisely. An expert can help you develop a winning bid strategy, determine which keywords to go after, pinpoint which audience to target, and set up a campaign that delivers the highest ROI.

03 Are your email campaigns getting results?

Doing email well requires effective strategy, messaging that inspires action, and delivery to the right people at the right time. An agency can tap into experience-based best practices to ensure your emails aren't ignored and your coveted audiences don't feel spammed.

04 Is your social media synced or scattershot?

To drive results through social media, you have to know what motivates tech influencers and decision-makers. You also have to have the time to do it. The right agency can promote your company strategically across channels using content that makes every post meaningful.



Build Demand With Complementary Programs

For many tech companies, partner marketing programs complement direct-to-customer programs. Success is built on both. A marketing agency whose expertise spans direct and partner-driven pipeline development can be a powerful ally.

Direct to Customer:

- ✔ Outbound Marketing
Increase brand awareness
- ✔ Inbound Marketing
Capture existing demand
- ✔ Event Marketing
Generate excitement
- ✔ Email Nurture
Engage leads
- ✔ Executive Door Opener
Book sales meetings
- ✔ Competitor Takeout
Prove solution superiority

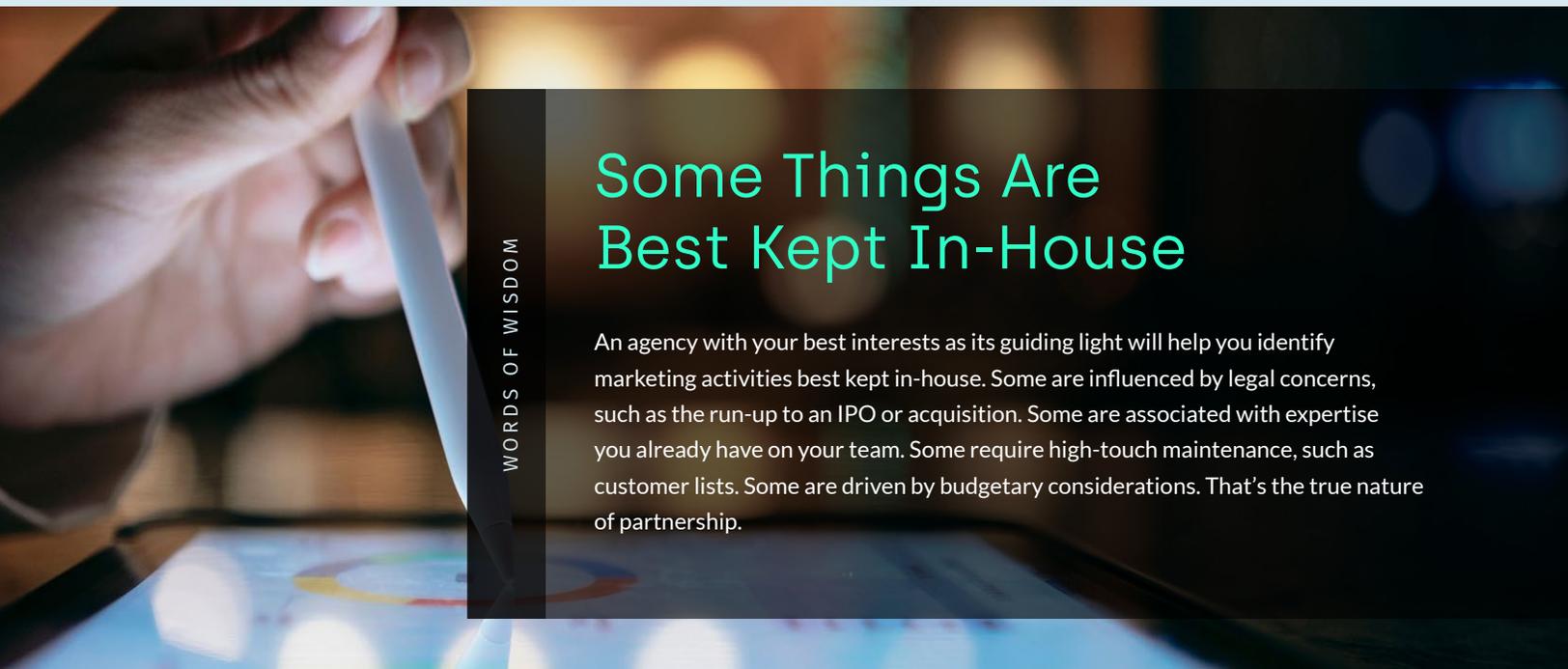
Partner Marketing:

- ✔ Marketing As A Service
Support partners' lead gen
- ✔ Lead-to-Partner
Drive leads at scale
- ✔ Managed Multi-Partner Campaigns
Increase brand awareness
- ✔ Campaign-In-A-Box
Jumpstart success



Uncover your best sales opportunities.

[DIG INTO DEMAND GEN GPS +](#)



WORDS OF WISDOM

Some Things Are Best Kept In-House

An agency with your best interests as its guiding light will help you identify marketing activities best kept in-house. Some are influenced by legal concerns, such as the run-up to an IPO or acquisition. Some are associated with expertise you already have on your team. Some require high-touch maintenance, such as customer lists. Some are driven by budgetary considerations. That's the true nature of partnership.



You Need an Agency That Gets You Like We Do

Yeager is one of the most trusted marketing agencies in tech. We've propelled our clients to success with deep technology expertise, a strategy-driven approach, and a commitment to aim higher. The result? Forward-thinking marketing that delivers tangible growth for the world's most well-respected technology companies.

Since 2009, we've crafted thousands of groundbreaking marketing programs for leading technology organizations of all sizes. When it's time to engage an agency, reach out. We'll help your marketing team solve your unique challenges and deliver greater results than you thought possible.

See What Our Clients Are Saying

We're proud to work with the world's top technology companies—including half of those on the Fortune 500—to deliver thoughtful, strategic, and innovative solutions that accelerate growth for clients across the technology ecosystem.

"An exceptional partner"

"Brings value propositions to life"

"Seamless collaboration and adaptation to our workflow"

"Consistently delivers exceptional work"

"Crafts highly creative and innovative campaigns"

"Deep understanding of our solutions"

"Transforms concepts into impactful marketing campaigns"

"Aligns perfectly with our vision and goals"

"Indispensable in our success"



With proven strategies borne of experience, we push clients to aim higher—and achieve more—than ever.



Ready To Aim Higher?

Schedule a call to see
how you can accelerate
your marketing success.

[CONTACT US ↗](#)