



How to Use This Worksheet

Use this worksheet to objectively evaluate and compare B2B lead generation agencies. Score each criterion on a scale of **1 (poor)** to **5 (excellent)**. Tally the total to help guide your decision.

1. Industry-Specific Expertise

- Do they have experience in your industry?
- Can they show relevant case studies?
- Do they understand your sales cycle and buyer personas?

Score: ___ / 5

2. Lead Quality and Verification Process

- How do they source leads?
- What is their process for verifying data accuracy?
- How often do they refresh their database?

Score: ___ / 5

3. Pricing Model and ROI Alignment

- Is pricing transparent?
- Do they explain how costs relate to ROI?
- Are there hidden fees?
- Is the billing model suitable for your needs?

Score: ___ / 5

4. Multi-Channel Capabilities

- Do they use multiple channels (email, social, phone, events, ads)?
- Are outreach sequences tailored per channel?

Score: ___ / 5

5. Scalability and Flexibility

- Can they increase lead volume as you grow?
- Do they offer SLAs or quality guarantees?
- Are leads exclusive?

Score: ___ / 5

6. Contract Terms and Lead Ownership

- What is the contract length?
- Are there auto-renewal clauses?
- What are the cancellation terms?
- Do you own the leads delivered?

Score: ___ / 5

7. Proof of Performance

- Can they share measurable results?
- Are client references available?
- Do they provide sample reports and dashboards?

Score: ___ / 5

Total Score

Add up your scores from each section.

 **Total Score: ___ / 35**

A higher score suggests a stronger fit for your business needs.

B2B Lead Generation Agency Vendor Selection Worksheet



Use this worksheet to compare and score different B2B lead generation agencies. Score each factor from **1 (Poor)** to **5 (Excellent)**. Total the scores to identify the best-fit vendor.

| Evaluation Criteria | Vendor A | Vendor B | Vendor C |
|--|----------|----------|----------|
| Industry Expertise | | | |
| Multi-Channel Capability | | | |
| Data Quality & Enrichment Process | | | |
| Technology Stack (CRM, AI, Reporting) | | | |
| Scalability & Flexibility | | | |
| Case Studies & References | | | |
| Lead Qualification Process | | | |
| Transparency & Reporting | | | |
| Compliance with US Regulations | | | |
| Cultural & Time Zone Alignment | | | |
| Total Score | | | |