

How to

Choose a B2B Lead Generation Agency

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FREE CHEAT SHEET · B2BXCLUSIVE

How to Choose a B2B Lead Generation Agency: 12 Questions to Ask (and How to Check the Answers)

Short answer: Choose a B2B lead generation agency by testing it, not by listening to it. Ask for sample records and draft emails for your buyers, the spam and bounce rates of their current campaigns, who runs your account, how a qualified meeting is defined in the contract, and what you keep if you leave. Then verify each answer yourself before you sign.

Key takeaways

- Ask for **proof you can see**: 25 sample records from your target list and two draft emails written for your buyers, before any contract.
- Ask about deliverability in numbers. Google tells senders to keep spam complaints **below 0.1%** and never reach **0.3%**; a good agency knows its own rates.
- Put the definition of a **qualified meeting** and an **exit clause** (domains, inboxes, lists, copy and reply history handed over) in writing.
- Score every agency on the same 12 questions. A weighted scorecard stops the best salesperson from winning instead of the best agency.

The scorecard: compare agencies on the same scale

Question	Weight	Agency A	Agency B	Agency C
1. Sample records	3	2 (6)	1 (3)	2 (6)
2. Draft emails	2	2 (4)	2 (4)	0 (0)
3. Named account manager	2	1 (2)	2 (4)	1 (2)
4. Sending domains	3	2 (6)	1 (3)	2 (6)
5. Spam and bounce rates	3	2 (6)	0 (0)	1 (3)
6. Reply handling	2	1 (2)	2 (4)	1 (2)
7. Qualified meeting in contract	3	2 (6)	1 (3)	2 (6)
8. Live tool access	2	2 (4)	0 (0)	2 (4)
9. References you choose	1	1 (1)	2 (2)	1 (1)
10. Willing to say no	1	2 (2)	1 (1)	1 (1)
11. Compliance by market	2	1 (2)	1 (2)	2 (4)
12. Exit terms	3	2 (6)	0 (0)	1 (3)
Total (max 54)		47	26	38

Agency scorecard (copy into a spreadsheet) (template: copy and adapt)

Agency name:

Date of call: Who was on it:

Score each: 0 = weak/none, 1 = reasonable, not checked, 2 = good and verified

Q	Topic	Weight	Score	Weighted	Notes
1	25 sample records	3			
2	Two draft emails for our buyer	2			
3	Named account manager + workload	2			
4	Sending domains, SPF/DKIM/DMARC	3			
5	Current spam and bounce rates	3			
6	First hour after a reply	2			
7	Qualified meeting in contract	3			
8	Our own login to tools and CRM	2			
9	References we pick ourselves	1			
10	When they would say no	1			
11	Rules in our markets + suppression	2			
12	What we keep if we stop	3			

Total (max 54):

Deal-breakers (any one = do not sign):

☐ Will send from our main company domain

☐ No written definition of a qualified meeting

☐ No handover of domains, list and copy on exit

Quick answers

What should I ask a lead generation agency before hiring them?

Ask who exactly they will contact (and for sample records), what the first email will say, who runs your account, what sending setup and spam rates they use, what happens after a reply, how a qualified meeting is defined, whether you get live access to the tools, who you can speak to as a reference, how they handle the law in your markets, and what you keep if you stop.

What are the red flags when choosing a lead generation agency?

Guaranteed meeting numbers with no definition of qualified, refusing to show sample data or draft copy before signing, sending from your main company domain, monthly PDF reports with no live access, 12-month lock-ins with no exit clause, and vague answers about who owns the domains and data.

How long should a trial or pilot with a lead generation agency be?

Plan on about 90 days. The first two to three weeks go on research, data and inbox setup, so a one-month test mostly measures setup. Agree written milestones for each month, and a month-to-month or short notice period after that.

Should a lead generation agency send emails from my company domain?

Usually not. Most outbound teams send from separate, similar-looking domains with their own inboxes, so a deliverability problem cannot damage the domain your customers and staff rely on. Ask who registers those domains and make sure they are transferred to you if you leave.

Is it better to pay per meeting or a monthly retainer?

Either can work. Pay per meeting only protects you if the contract defines a qualified meeting precisely and gives you the right to reject ones that do not match. A retainer protects you if it comes with clear monthly milestones, live access to the campaigns and a short notice period.

How do I compare lead generation agencies fairly?

Ask every agency the same 12 questions, score each answer 0 (weak or none), 1 (reasonable but not checked) or 2 (good and verified), and multiply by a weight that reflects how often that area causes engagements to fail. A weighted scorecard stops the agency with the best sales call from beating the one with the strongest engine.

Book a free strategy call

<https://bookshawn.b2bxclusive.com/>

Full guide with sources: <https://b2bxclusive.com/blog/how-to-choose-a-lead-generation-agency/> · By Subhendu J Shawn, founder of B2BXclusive.