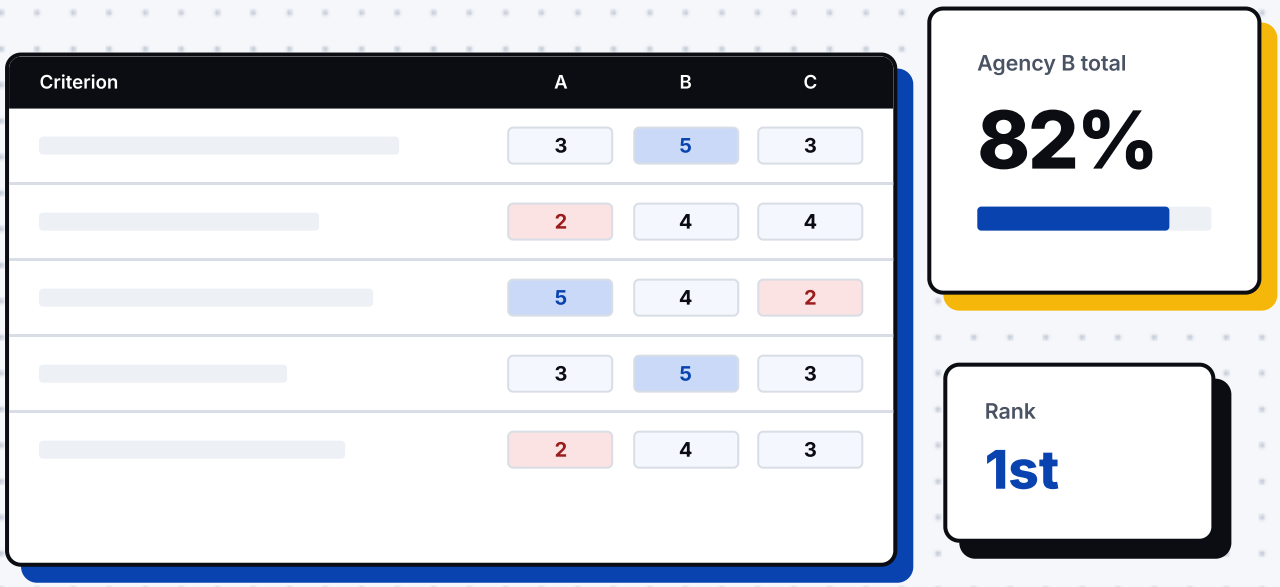
Perceptric

Template

SEO Agency Evaluation Scorecard

Score up to three SEO agencies side by side on 39 criteria, from pipeline focus to AI search, and pick the one that fits your stage.



perceptric.com

2026 edition

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01 Run the evaluation in 6 steps

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criteria in 7 groups, each with a note on what good looks like

3
agencies scored side by side, with weighted totals and a rank

25
questions to ask in every call, with what a strong answer covers

Use it with the Excel workbook

This guide goes with the scorecard workbook. Its Scorecard sheet holds 39 criteria in 7 groups, with weights, scores for three agencies and totals by formula. The Questions sheet lists 25 questions, and the How to use sheet repeats the steps.

01

CHAPTER ONE

Run the evaluation in 6 steps

Put every agency on your shortlist through the same brief, the same questions and the same scale.

The three phases of a fair evaluation

Six steps from brief to signed contract

The 1 to 5 scale and the evidence behind each score

A one-page brief you can fill in today

Hiring an SEO agency commits your budget and your pipeline for six to twelve months. This scorecard puts every agency on your shortlist through the same criteria, so you can compare their evidence side by side.

Before the calls
Write the brief, set the weights and pick three agencies.

→

During the calls
Ask the same 25 questions and score each agency within a day.

→

Before you sign
Call references and get the team and exit terms in writing.

STEP 1, BEFORE THE CALLS

Write a one-page brief: give each agency your goals, your buyers, your current traffic and your budget range. The same brief makes proposals easy to compare, and it shows which agency read it closely.

STEP 2, BEFORE THE CALLS

Set the weights before the first call: mark each criterion 3 for a must-have, 2 for important and 1 for nice to have. Weights set early keep a polished pitch from changing what you care about.

STEP 3, BEFORE THE CALLS

Shortlist three agencies: three agencies give you a fair comparison without filling your calendar for a month. Rename the Agency A, B and C columns on the Scorecard sheet with their names.

STEP 4, DURING THE CALLS

Ask the same questions in every call: use the 25 questions on the Questions sheet and take notes in each agency's column. Ask for proof you can check, such as a live page they built or a sample report.

STEP 5, DURING THE CALLS

Score within a day: score each criterion from 1 to 5 while the call is fresh, using the "What good looks like" column. Leave a cell blank when you have no evidence, and the sheet leaves it out of the math.

STEP 6, BEFORE YOU SIGN

Check references and terms: call two references for each of your top two agencies before you decide. Then get the named team and the exit terms written into the contract before you sign.

Your one-page brief

Goals for 6 and 12 months _____

Buyer roles you sell to _____

Current traffic and demos _____

Budget range per month _____

Your must-have criteria _____

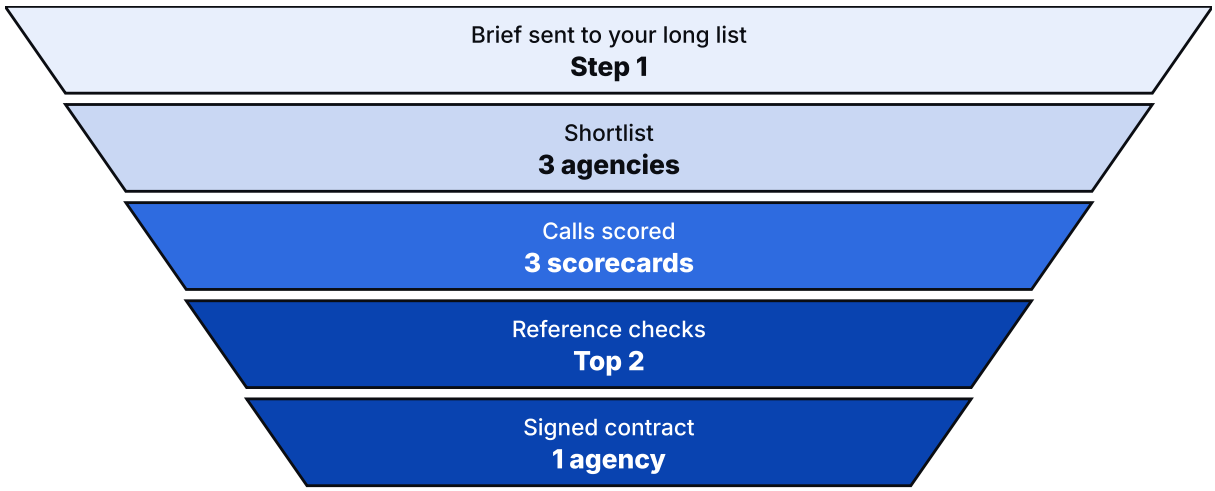
The 1 to 5 scale

Score	Meaning	Evidence you should see
1	Missing	No answer, or the answer avoids the question.
2	Weak	A general answer with no example or proof.
3	Meets the bar	A clear answer with one example.
4	Strong	A clear answer with examples and numbers from past clients.
5	Best in class	Proof you can check, such as a live page, a sample report or a reference call.

Blank beats a guess

A blank cell drops out of the math, so an agency keeps its percent when you skipped a question. A guessed 3 moves the total with no evidence behind it.

How the field narrows



Source: Perceptric evaluation process, 2026

Do this now

Write your one-page brief today, and set the weights in column D before you contact any agency.

02

CHAPTER TWO

Weight the criteria for your stage

Weights decide which strengths count most in the total, so set them for the company you are today.

- Why AI search and reporting weigh more in 2026
- All 39 criteria and the 13 must-haves
- Suggested group weights for three stages
- How the default weights split across the groups

94%

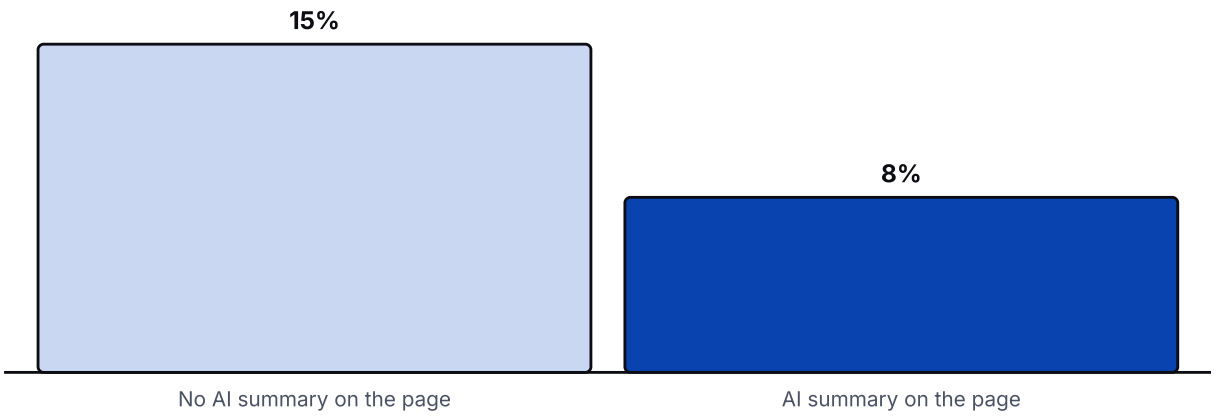
of B2B buyers use AI somewhere in their buying process.

Source: Forrester Buyers' Journey Survey, 2025

A company writing its first SEO plan needs different strengths from a company with a large site and many teams. AI search has also changed what every stage should ask of an agency.

Why AI search and reporting weigh more in 2026

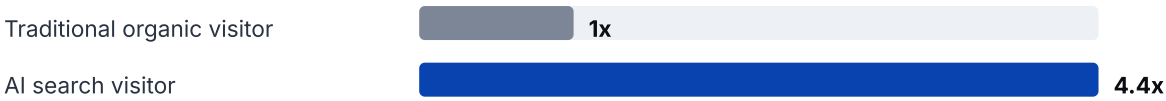
Google visits with a click on a result link



Source: Pew Research Center, 2025

Study: Google users are less likely to click on links when an AI summary appears

Value of a visitor, traditional organic visitor = 1



Source: Semrush, 2025

Study: AI search SEO traffic study

Buyers now research vendors inside AI answers, and fewer of them click through to websites. Your agency should track your AI visibility and link pages to demos in your CRM, because traffic alone says less about revenue each year.

All 39 criteria at a glance

39
criteria in the Scorecard sheet

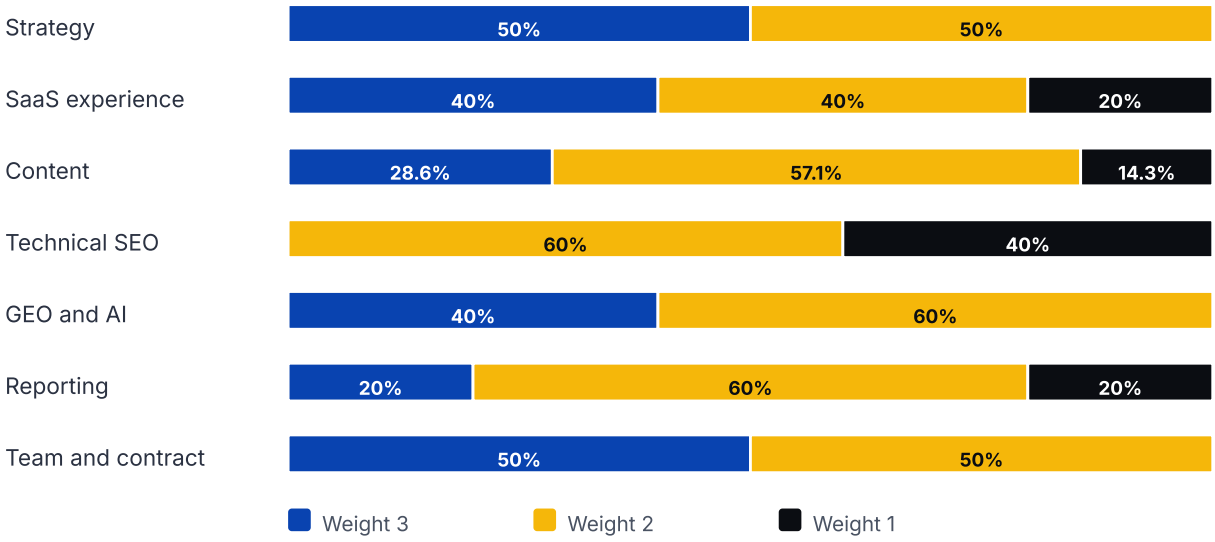
13
must-haves with a default weight of 3

86
weight points in the default setup

Strategy and pipeline focus	Ties the plan to pipeline goals; Starts with buyer-intent pages; Knows your buyers; Has a 90-day plan; Picks topics from your data; Fits your team and budget
SaaS and industry experience	Relevant B2B or SaaS work; Proof with real numbers; Knows your category; References you can call; Handles complex or regulated claims
Content quality	Samples meet your bar; Uses your experts; Builds pages that convert; Edits and checks facts; Clear AI use policy; Designs for conversion; Refreshes old content
Technical SEO	Thorough technical audit; Fixes your developers can ship; Site structure and internal links; Safe migrations and redesigns; Works with your CMS
GEO and AI search	Tracks AI visibility; Clear GEO method; Plans off-site mentions; Writes content AI can cite; Honest about limits
Reporting and attribution	Connects SEO to your CRM; Useful monthly report; Shares a sample report; Uses self-reported attribution; You own the data
Team, process and contract	Named team and seniority; Clear scope; Fair terms and exit; Set communication rhythm; Mapped onboarding; Price fits the scope

Blue: must-have, default weight 3. White and tinted: weight 2 or 1. The full wording of each criterion is in the workbook.

Criteria by default weight, per group



Source: Perceptric scorecard workbook, default weights, 2026

Suggested group weights by stage

01

First program

No SEO engine yet. You need an agency that learns your market fast and ships pages that bring demos.

02

Scaling

Some pages rank and you want steady growth. The default weights in the workbook suit this stage.

03

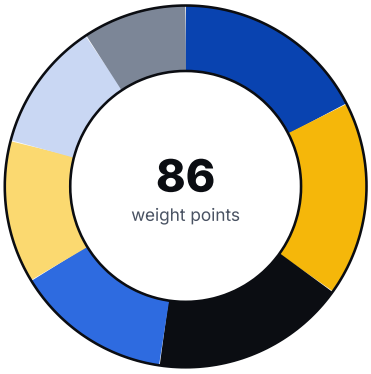
Mature

A large site with several teams publishing. Technical risk and approvals carry more weight.

Group	First program	Scaling	Mature	Why the weight changes
Strategy and pipeline focus	**3**	**3**	**3**	Every stage needs pages that bring demos.
SaaS and industry experience	**3**	2	2	Early teams lack time to teach the market.
Content quality	**3**	**3**	2	Mature teams often keep writers in house.
Technical SEO	1	2	**3**	Large sites carry more migration risk.
GEO and AI search	2	**3**	**3**	AI answers shape the vendor shortlist.
Reporting and attribution	2	**3**	**3**	Bigger budgets need proof of pipeline.
Team, process and contract	2	2	**3**	More teams mean more approvals.

If you are at another stage, move the criteria in each group up or down to match this table.

Share of the 86 default weight points



Strategy and pipeline	17.4%
Content quality	17.4%
Team and contract	17.4%
GEO and AI search	14%
SaaS experience	12.8%
Reporting	11.6%
Technical SEO	9.3%

Source: Perceptric scorecard workbook, 2026

> **Set the weights before the first call. A polished pitch should never change what you care about.**
>
> Perceptric

Your group weights

Your stage _____

Groups to weight up _____

Groups to weight down _____

Your must-haves (weight 3) _____

Do this now

Pick your stage from the table, then adjust the weights in column D before your first agency call.

03

CHAPTER THREE

Read the totals, with a worked example

Each group and the total show as a percent of the best possible score, so you can see strengths and gaps at a glance.

Four rules for reading the results

A filled-in scorecard for three agency types

Group profiles and totals in charts

When the runner-up still fits

The sheet shows each group and the total as a percent of the best possible score. Blank cells are left out, so an agency never loses points for a question you skipped.

Four rules for reading the results

- [ ] Read the group subtotals first to see where each agency is strong or thin.
- [ ] Treat a must-have scored 1 or 2 as a deal breaker, whatever the total says.
- [ ] Treat totals within 5 points as a tie, and let references and fit decide.
- [ ] Update the scores after reference calls, since they can confirm or undo a pitch.

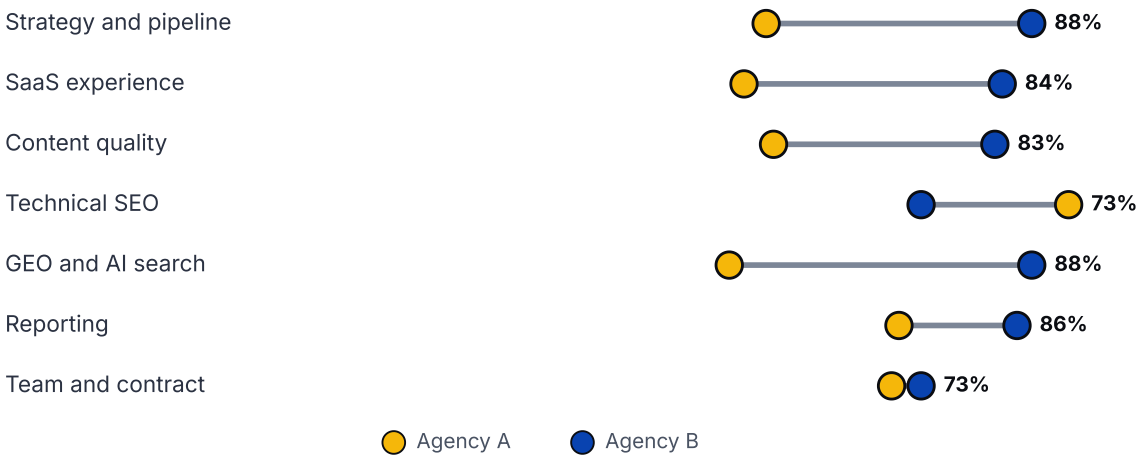
A sample filled-in scorecard

The example below scores three agency types with the default weights. The scores are made up to show how the sheet reads, and they describe no real agency.

Group	Weight	Agency A Generalist SEO	Agency B B2B SaaS specialist	Agency C Content studio
Strategy and pipeline focus	15	52%	**88%**	61%
SaaS and industry experience	11	49%	84%	64%
Content quality	15	53%	83%	**87%**
Technical SEO	8	**93%**	73%	50%
GEO and AI search	12	47%	**88%**	58%
Reporting and attribution	10	70%	**86%**	48%
Team, process and contract	15	69%	73%	69%
Total	**86**	**60%**	**82%**	**64%**

Shading: under 55% lightest, 55% to 69%, 70% to 84%, and 85% or more darkest.

Group scores, Agency A against Agency B (value shown: Agency B)



Source: worked example with made-up scores, Perceptric scorecard workbook, 2026

Weighted total



Source: worked example with made-up scores, Perceptric scorecard workbook, 2026

Agency B leads at 82%, with no group below 70%. The two runners-up each win one group, and each has a gap that matters.

Agency A, generalist SEO

Agency A wins technical SEO at 93% but scores 47% on GEO and AI search. That is a real gap for a scaling company.

Agency C, content studio

Agency C writes the best content at 87% and scores 48% on reporting. If your team already tracks pipeline in house, Agency C could still fit a content-only scope.

Do this now

After your last agency call, enter every score and read the group rows before you look at the total.

04

CHAPTER FOUR

25 questions to ask every agency

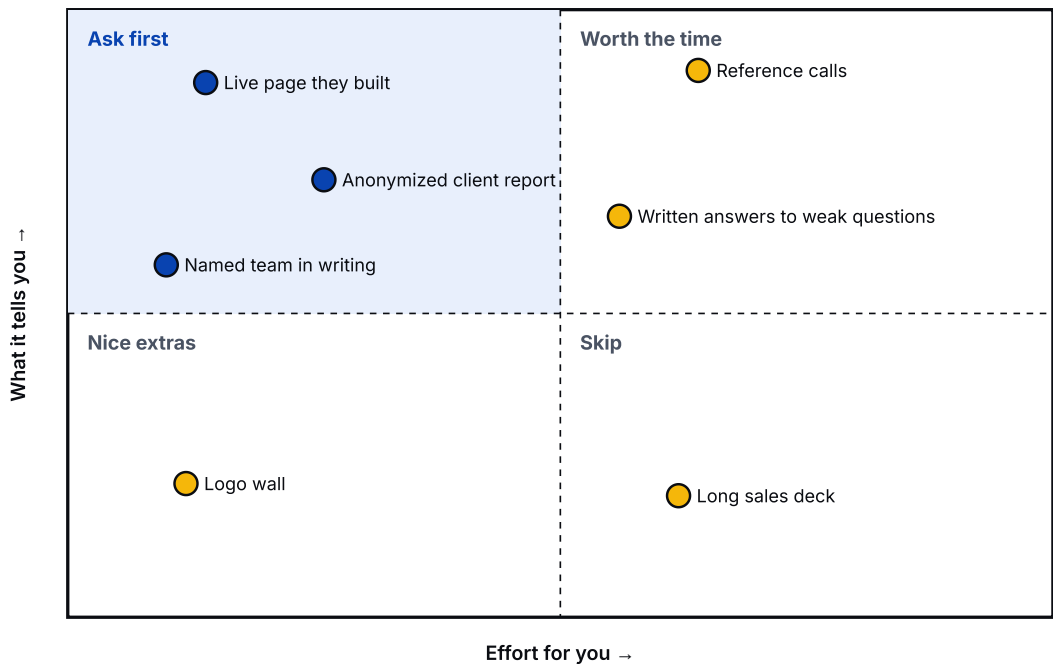
Ask the same questions in every call, and write the answers in the Questions sheet.

- Questions for each of the 7 groups
- What a strong answer covers
- Which proof to ask for first
- A follow-up for the weakest answers

Ask these questions in every call and write the answers in the Questions sheet. A strong answer gives details you can check later, such as names, dates and live examples.

Strategy: 4 questions | Experience: 3 | Content: 4 | Technical SEO: 3 | GEO and AI search: 3 | Reporting: 3 | Team and contract: 5

Which proof to ask for first



Source: Perceptric evaluation framework, 2026

Strategy and pipeline focus

#	Question	What a strong answer covers
1	What business result would you aim for in our first 6 and 12 months?	A demo or pipeline target tied to your baseline, the leading metrics that show progress, and the assumptions behind it.
2	Which pages would you build first, and why?	Specific buyer-intent pages for your product, such as comparison or use-case pages, with the demand and intent behind each.
3	How do you pick topics when our product terms have low search volume?	Sales calls, customer words and problem searches. They value buying intent over volume and track conversions per page.
4	What do you need from our team each month?	Hours from your experts, approvers and developers, plus a plan for when those hours slip.

SaaS and industry experience

05

Show us a client with a buyer and sales cycle like ours. What changed for them?

A dated case with the starting point, the work done and business results, plus a reference you can call.

06

Can we speak with two current clients?

Names offered within a few days, including one client that has worked with them for over a year.

07

Tell us about an account that went wrong. What did you change afterward?

A specific mistake, what it cost the client and the process change that followed.

Content quality

#	Question	What a strong answer covers
8	Who writes our content, and how will they learn our product?	Named writers with B2B or SaaS background and an onboarding plan with product demos and expert interviews.
9	How do you use AI in research and writing?	Clear rules on where AI helps, where people write and edit, and how every fact gets checked before publishing.
10	How do you get input from our experts without taking much of their time?	Short recorded interviews, questions sent ahead and one review round per piece.
11	What does your editing and approval process look like?	Each step and its owner, turnaround times and the number of revision rounds included in the fee.

Technical SEO

12. What would you check first on our site?

Indexing, crawl errors, speed, internal links and structured data, ranked by the business impact of each fix.

13. How do you hand technical fixes to our developers?

Tickets with steps and examples, sized for a sprint, with a check after each release.

14. How have you handled a site migration or redesign?

A real example with a redirect map, a crawl before launch and traffic checks for weeks after launch.

GEO and AI search

15

How do you measure our visibility in AI answers today?

A fixed list of buyer prompts, the AI engines tracked, how often they check and your share of answers next to competitors.

16

What do you change to get us cited in ChatGPT, Perplexity and AI Overviews?

Page changes such as direct answers, facts and clear structure, plus mentions in the outside sources those engines cite.

17

What can you not control in AI search?

Plain limits: answers change often, placement is never guaranteed and results take months to show.

Reporting and attribution

#	Question	What a strong answer covers
18	Can we see a real monthly report from another client, anonymized?	Yes. It leads with leads and pipeline, then rankings, traffic and AI visibility, and ends with next steps.
19	How will we know which pages bring in demos?	GA4 conversions, CRM fields, UTM rules and a "How did you hear about us?" field, set up in the first month.
20	What will you report in the first 90 days, before rankings move?	Leading signs such as pages shipped and indexed, impressions, early rankings and first AI mentions.

Team, process and contract

#	Question	What a strong answer covers
21	Who works on our account, and for how many hours a month?	Names, roles, seniority and monthly hours, plus who owns the strategy.
22	What happens if our main contact leaves your team?	Written handover notes, shared files and an intro to the new lead within a set number of days.
23	What is the notice period, and what do we keep if we leave?	A clear notice period, and you keep all content, data, dashboards and tool accounts.
24	What does the monthly fee include, and what costs extra?	A written list of deliverables, with extras such as links, design or tools priced up front.
25	How do you decide to change the plan when something is not working?	Set review dates, the numbers that trigger a change and an example of a plan they changed for a client.

Check before you sign

- [ ] The contract names who does the work and their monthly hours.
- [ ] The scope lists monthly outputs, such as page counts, and what counts as delivered.
- [ ] The notice period and any price changes are written down.
- [ ] All content, analytics, dashboards and tool accounts sit in your name.
- [ ] Setup fees and extras such as links, design or tools have a stated price.
- [ ] Both references for your chosen agency confirmed what the pitch promised.

Follow-up for your top two agencies

Agency _____

Five weakest answers (#) _____

Proof you asked for _____

Written answers due by _____

Do this now

Send your top two agencies the five questions they answered most weakly, and ask for written answers within a week.

ABOUT PERCEPTRIC

Put us on your shortlist

Perceptric is an SEO, GEO and content agency for B2B and SaaS companies. We build content that ranks in Google and AI answers and brings in sales-qualified leads.

We also built Arrowsterr, a platform that tracks how AI engines talk about your brand. Score us with this template, and we will answer every question in it on the call.

Book a call

- SEO for B2B and SaaS companies
- GEO for ChatGPT, Perplexity and Google AI Overviews
- Content that brings in sales-qualified leads
- AI search tracking with Arrowsterr