

Free Checklist: How to Hire a Fintech Marketing Agency (2025 Template)

This checklist is designed to guide fintech companies through the complex process of hiring a marketing agency that understands both creative execution and regulatory compliance.

Drawing insights from top industry resources like Digivate, Dokin, and Content Rewired, this tool by worldsultimate.net will help you evaluate and shortlist the right agency partner.

- ☐ Define your core fintech marketing objectives and the exact mix of services you need - e.g., paid acquisition, SEO, compliance content, funnel optimization.
- ☐ Research and shortlist 5–10 fintech marketing agencies that specialize in your niche or vertical (e.g., B2B SaaS, crypto, digital banking).
- ☐ Review case studies that demonstrate compliance-savvy marketing results within regulated environments. Prioritize agencies with experience in finance or fintech.
- ☐ Prepare interview questions focused on performance tracking, regulatory sensitivity, and industry-specific KPIs such as CAC, ROAS, and conversion rates.
- ☐ Assess the agency's communication style and internal team structure. Meet your account manager and strategists during the pitch process.

- ☐ Request full transparency on pricing models: fixed retainers, performance-based contracts, or blended hourly rates. Ask for references or proof of ROI.
- ☐ Ask for a sample marketing strategy, creative brief, or channel audit to understand their process and creativity.
- ☐ Define onboarding success metrics: CAC targets, MQL volume, pipeline velocity, content compliance checks, etc.
- ☐ Pilot with a defined 30–60 day test campaign before committing to long-term retainers or contracts.

Use this checklist as a conversation starter with potential agencies. Hiring the right partner isn't just about budget, it's about shared understanding of your regulatory landscape, customer lifecycle, and growth vision.