

VENDOR INTELLIGENCE REPORT

Marketing Agency Assessment

5-Agency Evaluation · Top-3 Shortlist

CLIENT

Veloxa Software, Inc.

B2B SaaS · \$32M ARR · Series B · Sales-Led Growth

01

EXECUTIVE SUMMARY SIGNALRANK VENDOR INTELLIGENCE REPORT - VELOXA SOFTWARE, INC.

VendorCue.ai · Ranked Decisions. Not Opinions.

Engagement Overview

Veloxa Software engaged VendorCue.ai to conduct an independent assessment of marketing agencies capable of supporting a sales-led growth motion at the Series B stage. Veloxa has \$32M ARR, is scaling an outbound sales team from 18 to 35 reps over the next 12 months, and requires pipeline generation, demand capture, and ABM capability rather than brand awareness or top-of-funnel content volume.

VendorCue.ai evaluated five agencies across a five-layer evidence framework, incorporating behavioral signals, structural fit analysis, and independent risk assessment. This report does not reflect agency self-reported data — it reflects what we observed.

Shortlist Results

# 1	Ironclad Demand	HIGH CONFIDENCE	71 / 100
# 2	Elevate B2B	STRONG CANDIDATE	68 / 100
# 3	Apex Growth Co.	CONDITIONAL FIT	58 / 100

Not Shortlisted

Meridian Marketing Group — Score: 55 — Insufficient sales-led GTM alignment; strong brand, weak pipeline capability

BluePeak Digital — Score: 44 — Overpromising patterns detected; case study evidence inconsistent with stated specializations

Key Findings

- No agency is a perfect match. Ironclad Demand is the strongest structural fit but has limited publicly verifiable case studies at Veloxa's exact ARR range. We rate confidence STRONG, not DEFINITIVE.
- Sales-led GTM alignment is the critical filter. Two of five agencies (Meridian, BluePeak) operate primarily in brand and content paradigms — they are structurally misaligned with Veloxa's motion regardless of quality.
- ABM capability is scarce and overstated. All five agencies claim ABM capability; only two demonstrate it through observable hiring patterns, toolstack evidence, and case study specificity.
- Hiring signals were the most differentiated data layer. Agencies actively investing in senior demand gen and RevOps talent score significantly higher on delivery reliability than those hiring generalists or showing team contraction.

02

METHODOLOGY & SCORING FRAMEWORK HOW VENDORCUE.AI EVALUATES AGENCIES

VendorCue.ai · Ranked Decisions. Not Opinions.

VendorCue.ai does not rely on self-reported agency performance. We weight observable behaviors over claimed capabilities, and we prioritize repeatability of evidence over isolated case studies. The framework below converts messy, real-world signals into a structured, defensible score.

The Five Evidence Layers

<p>1. Claimed Capability Layer</p>	<p>LOWEST TRUST</p>
<p>Website positioning, service descriptions, and published case studies. This is input, not truth. We use it as a baseline and actively compare it against observable behavior.</p>	
<p>2. Behavioral Signal Layer</p>	<p>HIGH SIGNAL</p>
<p>Hiring patterns, team composition changes, GTM consistency (do they practice what they sell?), and channel depth signals. These are difficult to fake at scale and are the primary differentiation layer in the VendorCue.ai model.</p>	
<p>3. External Validation Layer</p>	<p>WEIGHTED</p>
<p>Third-party reviews, public references, and content quality assessment. Reviews are not trusted blindly — we weight them by reviewer credibility, specificity, and recency.</p>	
<p>4. Structural Fit Layer</p>	<p>CRITICAL FILTER</p>
<p>Does this agency work with companies like Veloxa? At your stage, with your GTM motion, with your internal team structure and budget? This is where most agency failures originate — and it's what RFPs systematically miss.</p>	
<p>5. Risk Detection Layer</p>	<p>SCORE MODIFIER</p>
<p>Active identification of overpromising patterns, channel mismatch, delivery model gaps, and dependency risks. Detected risk factors reduce the total score by up to 10 points.</p>	

Scoring Model

Total score = 100 points. We are not scoring "How good is this agency?" — we are scoring "How likely is this agency to succeed for Veloxa *specifically*?"

Category	Max Points	Primary Question
A. Structural Fit	30	Do they work with companies like Veloxa at this stage and GTM?
B. Execution Capability	25	Can they actually do the work at the required quality level?
C. Delivery Reliability	20	Will they show up, staff correctly, and deliver consistently?

D. Behavioral Signals	15	Do their observable actions match their positioning?
E. Risk Adjustment	-10 to 0	Are there red flags that increase the probability of failure?
TOTAL	100	Probability-weighted confidence in agency-client success

Score Interpretation

80–100	HIGH CONFIDENCE	Recommend proceeding to final selection
65–79	STRONG CANDIDATE	Recommend shortlisting with one verification step
50–64	CONDITIONAL FIT	Shortlist only with specific conditions or gap mitigation
Below 50	LOW PROBABILITY	Not recommended for this engagement

03

COMPARATIVE SCORECARD ALL FIVE AGENCIES — SIDE BY SIDE

VendorCue.ai · Ranked Decisions. Not Opinions.

All 5 agencies scored across all categories

Criterion	Ironclad Demand	Elevate B2B	Apex Growth	Meridian Mktg	BluePeak Digital
Structural Fit	24	22	18	20	14
Exec. Capability	21	18	20	16	17
Delivery Reliab.	17	19	15	16	13
Behavioral Sigs	12	11	10	9	8
Risk Adjust.	-3	-2	-5	-6	-8
TOTAL	71	68	58	55	44

How to Read This Table

Green scores indicate shortlisted agencies. Orange indicates conditional shortlist. Red indicates agencies not recommended. The Risk Adjustment row shows points deducted for identified red flags. Detailed rationale for each score follows in the individual agency profiles.

04

AGENCY PROFILES DETAILED ASSESSMENTS — SHORTLISTED & NOT SHORTLISTED

VendorCue.ai · Ranked Decisions. Not Opinions.

AGENCY #1: IRONCLAD DEMAND

#	SHORTLISTED · Score:	✓ Recommended	HIGH CONFIDENCE /
1	71/100		100

Location
Austin, TX

Founded
2017

Team Size
42 FTE

Agency Overview

Ironclad Demand is a B2B demand generation agency with a stated focus on pipeline creation for sales-led SaaS companies. Founded by former Salesforce and HubSpot practitioners, the agency's positioning is unusually specific — they explicitly decline brand and awareness engagements and focus on the \$15M–\$75M ARR segment. Their content and methodology reflect a genuine understanding of the sales-marketing alignment problem that Veloxa faces.

Structural Fit Assessment

- **Stage fit:** Strong. Client logos and case study evidence cluster in the \$20M–\$60M ARR range — Veloxa sits squarely in their ICP.
- **GTM alignment:** Excellent. Ironclad operates in a pure sales-led motion paradigm. Their published methodology references pipeline velocity, sales cycle compression, and SDR-to-AE handoff quality — not MQL volume.
- **ABM capability:** Verified. Hiring data shows two dedicated ABM strategists hired in the past 8 months. Job descriptions reference 6sense and Demandbase at a practitioner level, not a vendor-pitch level.
- **Engagement model fit:** Good. They operate on 6-month minimum retainers with defined sprint structures — appropriate for Veloxa's need for sustained pipeline generation.
- **Internal team complement:** Strong. Veloxa's internal marketing team of 4 is primarily product-focused. Ironclad's delivery model assumes an underpowered internal team and accounts for this in their process.

Score Breakdown

A. Structural Fit	24/30
B. Exec. Capability	21/25
C. Delivery Reliability	17/20
D. Behavioral Signals	12/15
E. Risk Adjustment	-3/10
TOTAL	71/100

Risk Flags

MED	Case study depth at Veloxa scale	Three of four published case studies are in the \$50M–\$100M ARR range — above Veloxa's current position. Evidence of \$20–35M ARR success is thinner. Recommend requesting one reference at comparable ARR during diligence.
LOW	Team capacity signal	Two large enterprise accounts identified in hiring signals suggest capacity may be partially allocated. Confirm bandwidth availability before proceeding.

Recommendation	Ironclad Demand is the strongest structural fit of the five agencies evaluated. Their sales-led specialization is genuine, verifiable, and rare. Recommend proceeding to engagement with one reference check at the \$25–40M ARR range to confirm case study applicability.
Conditions	Confirm available capacity for new retainer start within Veloxa's timeline. Request one customer reference at comparable ARR before contract execution.

AGENCY #2: ELEVATE B2B

# 2	SHORTLISTED · Score: 68/100	✓ Recommended	STRONG CANDIDATE / 100
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Location Chicago, IL	Founded 2015	Team Size 67 FTE
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Agency Overview

Elevate B2B is a mid-sized B2B marketing agency with broad service offerings spanning demand generation, content, and digital advertising. They have a dedicated SaaS vertical practice launched in 2021 and a growing ABM practice. While less specialized than Ironclad Demand, Elevate's larger team and more mature delivery infrastructure provide operational redundancy that Ironclad cannot match. Their client retention signals are the strongest of the five agencies evaluated.

Structural Fit Assessment

- **Stage fit:** Good. SaaS vertical experience spans \$10M–\$200M ARR — confirms baseline category knowledge, though with some dilution in specialization.
- **GTM alignment:** Moderate-Strong. Elevate operates across both PLG and sales-led motions. Their sales-led work is credible but requires scoping discipline to ensure the right internal team is assigned.
- **ABM capability:** Credible but shared. One dedicated ABM lead and two generalists who rotate into ABM projects. Functional but thinner than Ironclad at the practitioner level.
- **Delivery reliability:** Best-in-class. Average inferred client tenure exceeds 18 months — the strongest retention signal of the five agencies.
- **Engagement model fit:** Good. Flexible on engagement structure — they have offered both project and retainer models to similarly-sized clients.

Score Breakdown

A. Structural Fit	22/30
B. Exec. Capability	18/25
C. Delivery Reliability	19/20
D. Behavioral Signals	11/15
E. Risk Adjustment	-2/10
TOTAL	68/100

Risk Flags

MED	Specialization dilution risk	Elevate's breadth of services creates risk of non-specialist resourcing. Require named lead assignment with SaaS/demand gen background in contract.
LOW	ABM team depth	ABM capability is real but thinner than claimed. If ABM is a primary workstream, validate practitioner assignment before signing.
Recommendation	Elevate B2B is a strong shortlist candidate, particularly if Ironclad Demand cannot confirm capacity or if Veloxa requires operational depth beyond what a 42-person shop can provide. Their delivery reliability and client retention signals are the best of the five agencies.	

Conditions

Require named resource assignment including lead strategist credentials prior to contract execution.
Confirm sales-led motion team assignment rather than brand team.

AGENCY #3: APEX GROWTH CO.

# 3	SHORTLISTED · Score: 58/100	■ Conditions Apply	CONDITIO NAL FIT / 100
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Location
New York, NY

Founded
2019

Team Size
28 FTE

Agency Overview

Apex Growth Co. is a newer entrant (founded 2019) that has grown quickly and positions aggressively around revenue-focused B2B marketing. Their work is technically capable and their founder brings credibility from a prior role at a Series B SaaS company's marketing org. However, their rapid growth has outpaced team depth, and several signals suggest delivery inconsistency relative to their positioning. Conditionally shortlisted: right orientation, but execution infrastructure must be verified before proceeding.

Structural Fit Assessment

- **Stage fit:** Strong conceptually. Apex's founder background and case study language reflect genuine Series B SaaS experience. ICP alignment is credible at the strategic level.
- **GTM alignment:** Good. Demand generation and pipeline focus is their stated primary motion — consistent with Veloxa's needs. Less ABM depth than the top two shortlisted agencies.
- **Team depth:** Concern. Headcount of 28 with three enterprise accounts identified suggests significant allocation constraints. Junior hiring patterns in the last two quarters are a mild concern.
- **Pricing model:** Favorable. Apex is likely the most cost-competitive of the three shortlisted agencies.

Score Breakdown

A. Structural Fit	18/30
B. Exec. Capability	20/25
C. Delivery Reliability	15/20
D. Behavioral Signals	10/15
E. Risk Adjustment	-5/10
TOTAL	58/100

Risk Flags

HIGH	Delivery capacity constraint	Team of 28 with three likely enterprise accounts creates meaningful capacity risk. If Apex cannot demonstrate available senior capacity, this is a disqualifying factor for Veloxa's timeline.
MED	Junior staffing pattern	LinkedIn hiring data shows a 3:1 ratio of junior to senior hires over the past two quarters — a common signal of a leverage model that sacrifices quality for margin.
MED	Case study recency	Most substantial case studies are 18–30 months old. Limited evidence of recent wins at comparable scale raises questions about current performance trajectory.

Recommendation	Apex Growth Co. is conditionally shortlisted. Their strategic orientation is right and founder credibility is genuine, but delivery infrastructure risk is real. Recommended as a backup or price-competitive alternative only if both conditions below are satisfied.
Conditions	(1) Confirm named senior team assignment with documented availability before RFP or reference stage. (2) At least one reference from a client engaged in the past 12 months at \$20M–\$50M ARR must be provided and verified.

AGENCIES NOT SHORTLISTED

Meridian Marketing Group · BluePeak Digital

Meridian Marketing Group — Score: 55

Meridian is a well-regarded mid-market agency with strong brand and content capabilities. They were not shortlisted because their GTM orientation is fundamentally misaligned with Veloxa's sales-led motion. Meridian's strongest case studies involve brand repositioning, content-led demand, and category creation — valuable capabilities for a different buyer at a different stage.

- Structural fit score: 20/30 — ICP is adjacent but not direct; their SaaS clients skew PLG
- Risk: No evidence of ABM platform expertise; stated ABM capability appears to be a repackaged content offer
- Recommendation: Not shortlisted for this engagement. Consider revisiting if Veloxa's strategy shifts toward brand/content investment.

BluePeak Digital — Score: 44

BluePeak Digital was the clearest outlier in this evaluation. Multiple overpromising signals were detected during behavioral analysis, and case study evidence does not support the specializations claimed on their website. This is exactly the pattern VendorCue.ai is designed to detect.

- Claimed specialization in ABM for enterprise SaaS; no hiring evidence of ABM toolstack practitioners
- Four case studies reference "pipeline lift" with no baseline metrics — unmeasurable by design
- GTM consistency gap: Agency promotes PLG content publicly while claiming sales-led specialization to prospects
- Recommendation: Do not shortlist. Consistency gap between observed behavior and claimed positioning is a material risk indicator.

05

NEXT STEPS RECOMMENDED ACTIONS & IMPORTANT NOTES

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Recommended Next Steps

Immediately	Share this report internally with your CMO, VP Sales, and CEO. Alignment on the right agency type — not just the right agency — is the most common failure point in this process.
Week 1	Conduct reference calls for Ironclad Demand (#1) and Elevate B2B (#2). Focus on: pipeline quality, sales team satisfaction, and how they handled scope changes. VendorCue.ai can provide reference call frameworks on request.
Week 1–2	Conduct a structured capabilities briefing with all three shortlisted agencies. Provide your ICP, current pipeline metrics, sales cycle data, and internal team structure. This is a conversation — not a pitch.
Week 2–3	Evaluate responses. You are looking for agencies that ask hard questions about your current state, not agencies that immediately tell you what they'll do. Generic response = misalignment signal.
Week 3–4	Select and negotiate. VendorCue.ai recommends a 3-month pilot structure before committing to a 12-month retainer. Define success metrics in advance — not after the engagement begins.

Important Notes on This Assessment

- This report is based on observable, publicly available signals — not insider knowledge. VendorCue.ai does not have access to internal agency financials, client satisfaction data, or proprietary performance metrics.
- We do not have a commercial relationship with any of the agencies evaluated. No agency paid to be included, scored higher, or excluded. Independence is the product.
- Scores reflect fit probability, not absolute quality. An agency scoring 44 for Veloxa may be an excellent fit for a different company with different requirements. This assessment is specific to your brief.
- Conditions matter. Where conditions are listed, they are real requirements — not suggestions. A conditional shortlist without satisfied conditions should be treated as a non-shortlist.
- This report is a starting point, not a final decision. VendorCue.ai provides structured judgment under uncertainty. You bring information we cannot observe: chemistry, intuition, and internal constraints.

06

YOUR COMPLETE HIRING PLAYBOOK HOW TO RUN THE FINAL ASSESSMENT & PROTECT THE DECISION

VendorCue.ai · Ranked Decisions. Not Opinions.

The VendorCue.ai assessment tells you who is most likely to succeed. This section tells you how to verify that, protect yourself contractually, run the final evaluation process rigorously, and recognize early if the engagement is going wrong. Used together, these tools replace the need for an external consultant at every stage of the selection and onboarding process.

6.1 Key Questions for Each Shortlisted Agency

These are not generic interview questions. Each set is derived from the specific risk flags and conditional shortlist criteria identified in this assessment. The goal is not to trip agencies up — it is to give them a fair opportunity to address the concerns that could cause the engagement to fail. Their answers will tell you more than their pitch deck.

Ironclad Demand — #1 Ranked / Score: 71

Focus: Capacity confirmation and case study applicability at Veloxa's ARR stage.

Can you walk us through a client you've worked with in the \$25M–\$40M ARR range — specifically how you built pipeline for their outbound sales motion?	<i>Tests case study depth at Veloxa's actual stage. Vague answer = the \$50M+ cases are their real experience.</i>
How many active retainer clients do you currently have, and what is your current capacity for a new engagement?	<i>Directly addresses the capacity risk flag. Any hesitation or vagueness here is a yellow flag.</i>
Which senior team members would be assigned to our account? Can we meet them before signing?	<i>Tests whether you get the people who sold you or junior staff. Non-negotiable ask.</i>
Your methodology references SDR-to-AE handoff quality. How have you approached this when the client's sales team was resistant to the process?	<i>Tests real experience vs. theoretical positioning. Sales team friction is Veloxa's most likely internal obstacle.</i>
What does a client need to have in place internally for your engagement to succeed? What's your biggest cause of engagement failure?	<i>Agencies that answer this honestly are trustworthy. Agencies that say 'we haven't had failures' are not.</i>
How do you handle it if pipeline quality is high but pipeline volume is below target at 90 days?	<i>Tests accountability framework. You want specificity: revised ICP, channel mix adjustment, etc. — not reassurance.</i>

Elevate B2B — #2 Ranked / Score: 68

Focus: Ensuring sales-led team assignment, not brand team. ABM practitioner validation.

Which internal team or practice group would handle our account — your SaaS vertical team, your brand team, or a mix? Who specifically?	<i>The core risk with Elevate. A brand-team answer after you've specified sales-led is a disqualifier.</i>
Who is your ABM lead, and can we speak with them directly about 6sense and Demandbase implementation for a company at our stage?	<i>Tests practitioner depth vs. generalist capability. A confident, specific answer is reassuring.</i>
You work with companies from \$10M to \$200M ARR. How does your approach differ for a \$32M sales-led company vs. a \$150M PLG company?	<i>Tests whether they understand the GTM motion difference or treat all SaaS clients the same.</i>
What does your reporting structure look like? Who owns the pipeline number — you or our sales team?	<i>Elevate's breadth creates accountability diffusion risk. You want clarity on who owns what outcome.</i>

Give us an example of an engagement where you had to push back on a client's internal assumptions about their ICP. What happened?

Tests intellectual honesty and consulting courage — both necessary for an agency to be genuinely useful.

Apex Growth Co. — #3 Ranked / Score: 58 (Conditional)

Focus: Conditions must be satisfied before proceeding. These questions are qualifying gates.

Who specifically would be the senior lead on our account? What percentage of their time would be allocated to us vs. other accounts?

This is a qualifying gate, not just a question. Named senior lead + clear allocation is the condition for proceeding.

Can you provide a reference from a client you've worked with in the past 12 months at the \$20M–\$50M ARR stage?

Second qualifying gate. A hesitant or dated reference list is a condition failure.

You were founded in 2019. Walk us through your three or four most formative client engagements — including one that didn't go as planned.

Tests maturity and self-awareness. A young agency that can't discuss failure honestly is higher risk.

Your team is 28 people. If your lead on our account left mid-engagement, what's the backup plan?

Tests operational resilience. Small agencies often have key-person dependency that creates delivery risk.

Your case studies are primarily from 18–30 months ago. What have you done in the last 12 months that reflects your current capability?

Tests recency directly. A strong answer changes the risk profile. No strong answer confirms the flag.

6.2 What to Reveal About Veloxa — Your Disclosure Guide

Most companies under-disclose in agency briefings. They want to appear stronger than they are, or they worry about sharing sensitive information. This is a mistake. The right agency will use difficult information to build a better strategy. The wrong agency will overpromise regardless of what you tell them. Controlled disclosure separates the two.

The table below identifies what to share, what to withhold, and — critically — what an agency's reaction to your disclosure tells you about whether they're the right fit.

Topic	What to Share	What Their Reaction Tells You
Pipeline gap	Your exact pipeline coverage ratio today and the target gap. 'We need to 3x pipeline in 9 months from near zero outbound.'	Good: They ask about your current sales cycle length, ACV, and conversion rates before responding. Bad: They immediately tell you their 'proven framework' without absorbing the numbers.
Sales team friction	That your 18-person sales team has limited experience with marketing-sourced pipeline and may be skeptical. Be specific.	Good: They've handled this before and describe a specific alignment process. Bad: They minimize it or say 'that's the client's problem to solve.'
Marketing team capacity	That your internal marketing team of 4 is primarily product-focused with limited demand gen experience. They'll need hand-holding.	Good: They describe a clear onboarding and knowledge transfer process. Bad: They assume you have more infrastructure than you do.
Budget range	Give them an honest range: 'We're budgeting \$15K–\$25K/month for 12 months with a 3-month pilot.' Don't inflate or deflate.	Good: They tell you honestly what's achievable at that budget. Bad: They agree enthusiastically with anything you say.
Past agency failures	If you've worked with agencies before that didn't work out, say so. Briefly describe why.	Good: They probe to understand root cause and distinguish their approach. Bad: They immediately blame the prior agency without asking questions.
Timeline pressure	That your Series B investors expect pipeline progress by Q3 and you're behind. Be honest about the pressure.	Good: They set realistic expectations about what's achievable in that timeline. Bad: They promise pipeline results in 60 days without qualification.
What NOT to share	Specific investor names, term sheet details, internal compensation structures, or detailed competitive intelligence about your product roadmap.	None of this is relevant to marketing execution. Sharing it creates unnecessary exposure.

6.3 Early Warning System — What to Watch in Months 1–3

Most agency relationships that fail do so for reasons that were visible in the first 90 days — but the client either didn't know what to look for or felt it was too early to raise concerns. By month 6, you've sunk significant budget and the organizational cost of switching is high. The signals below are specific to the risk profiles of your shortlisted agencies.

Warning Signal	When	What to Do
The team you met in the sales process is not the team doing the work	Day 1–14	Invoke named-resource clause immediately. If they can't honor it within 2 weeks, trigger the 30-day exit clause.
No discovery questions in week 1 — they go straight to execution	Week 1–2	Pause and require a formal discovery session. An agency that skips discovery doesn't understand your business.
Reporting focuses on activity metrics (emails sent, posts published) not pipeline metrics	Month 1	Redirect immediately. Require pipeline-contribution reporting tied to your CRM within 30 days.
You haven't heard from the senior lead in 3+ weeks	Month 1–2	Schedule a formal check-in and raise it directly. Silence at this stage usually means your account has been deprioritized.
MQL volume is high but SQL conversion is low or unmeasured	Month 2	This is the classic agency vanity metric problem. Require SQL definition alignment with your sales team before month 3.
Strategy keeps changing without explanation	Month 2–3	Ask for a written rationale for each pivot. Frequent unexplained pivots signal the original strategy was guesswork.
They haven't asked to meet your sales team	Month 1–2	In a sales-led motion, an agency that doesn't engage your sales team cannot build good pipeline. Insist on a joint session.
90-day review reveals no pipeline attribution	Day 90	Trigger the exit clause review. Lack of attribution at 90 days in a sales-led motion is a structural failure, not a timing issue.

6.4 Contract & Scope Guidance

The contract is where good intentions become binding commitments. The clauses below are specifically relevant to the risk profiles identified in this assessment. We recommend having your legal counsel review and incorporate applicable terms — but these are the substantive positions to insist on, regardless of how they're drafted.

Named Resource Clause	Require that the specific senior team members presented in the pitch be named in the contract and assigned to your account for a minimum of 6 months. Any substitution requires written approval with 30 days notice.
3-Month Pilot Structure	Do not sign a 12-month retainer without a 3-month pilot period that includes defined success criteria. Pilot exit should be possible with 30 days written notice if criteria are not met.
Pipeline Attribution Requirements	Define 'marketing-sourced pipeline' in the contract before signing. Include: SQL definition, attribution window, CRM tracking method, and reporting cadence. Ambiguity here benefits the agency, not you.
Performance Milestone Checkpoints	Include 30-day, 60-day, and 90-day milestone reviews with defined minimum acceptable outputs. These don't need to be aggressive — they need to be agreed and written.
Reporting Requirements	Specify: weekly async update, bi-weekly live call, monthly written report with pipeline contribution data. Any report that doesn't include pipeline metrics is not an acceptable deliverable.
IP Ownership	All creative assets, campaign structures, audience lists, and strategic documents produced under the engagement are Veloxa's property upon payment. This is non-negotiable.
Exit Provision	Either party can terminate with 30 days written notice after the pilot period. During the pilot, exit requires 14 days notice. Ensure retainer fees are prorated on exit, not forfeited.
Non-Solicitation	The agency may not solicit your sales team, marketing team, or other key employees during the engagement and for 12 months after termination.
Confidentiality	Mutual NDA covering all business information, pipeline data, customer lists, and strategic plans shared during the engagement. Standard but often underdrafted — ensure it covers verbal disclosures.

6.5 The Standardized Briefing Document — What to Give Each Agency

Give every shortlisted agency the same document. Standardizing the brief eliminates the advantage that well-networked agencies get from informal conversations, and it gives you a true apples-to-apples comparison of how each agency processes and responds to identical information.

Send this document 5–7 business days before your capabilities briefing call. Tell each agency: "We will be meeting with multiple agencies. This document represents everything we'll share in advance. Please come prepared to discuss your specific approach to our situation — not a general capabilities presentation."

SECTION A: About Veloxa

- Company: Veloxa Software, Inc. — B2B SaaS, \$32M ARR, Series B, 120 employees
- Product: [Brief description of what Veloxa does and who it serves — 2–3 sentences]
- ICP: [Describe your ideal customer profile — company size, industry, job titles, pain points]
- Average Contract Value: [\$X — or range]
- Sales Cycle Length: [X weeks/months average]
- Current Win Rate: [X%]

SECTION B: Our Marketing Function Today

- Internal team: 4 people, primarily product-focused. Limited outbound demand gen experience.
- Current channels: [List what you're doing today and rough budget allocation]
- CRM: [Your CRM — e.g. Salesforce, HubSpot] — marketing attribution currently [describe state]
- Content assets: [Describe what exists — case studies, whitepapers, demo videos, etc.]
- What's working: [Be honest about 1–2 things that are generating any traction]
- What isn't working: [Be equally honest about gaps]

SECTION C: What We Need

- Primary goal: 3x pipeline coverage in 9 months to support scaling from 18 to 35 sales reps
- Motion: Sales-led. ABM capability required for enterprise accounts.
- Not needed: Brand awareness, content volume, social media management
- Timeline: Engagement start target [date]. Pilot period: 3 months.
- Budget: \$[X]K–\$[X]K per month retainer

SECTION D: What We're Looking For in Your Response

- Specific approach to our pipeline gap — not a general demand gen methodology
- Named team members who would work on our account and their relevant experience
- At least one reference from a comparable company (Series B, sales-led SaaS, \$20M–\$50M ARR)
- Honest assessment of what's achievable in the first 90 days given our current state
- Your definition of success and how you'd measure it in our CRM

6.6 Final Presentation Scoring Rubric

Use this rubric when each shortlisted agency presents. Score each criterion 1–5 during or immediately after the presentation. The weighting mirrors the VendorCue.ai scoring framework so your final selection is consistent with the methodology that produced the shortlist.

Criterion	Wt.	Strong Answer (4–5)	Weak Answer (1–2)
Do they understand our GTM motion?	30%	References our specific sales-led model, asks about SDR motion, understands the difference from PLG	Generic demand gen talk, references MQL volume, doesn't engage with our sales org structure
Do they have a credible execution plan?	25%	Specific channels, sequenced timeline, named tools, realistic 90-day milestones with caveats	Vague methodology, no timeline, 'we'll figure it out in discovery,' or overpromised results
Is their team credible for our account?	20%	Named senior people, directly relevant experience, clear ownership of our account day-to-day	Generic 'we have a team of experts,' different people than who sold you, no named account lead
Do they ask good questions?	15%	Probes current pipeline data, sales team dynamics, past agency failures, and internal constraints	Goes straight into pitch mode, asks no questions about our situation, one-size-fits-all presentation
Do they set honest expectations?	10%	Qualifies what's achievable in 90 days, identifies risks, acknowledges what they need from us	Promises results in 60 days, no caveats, agrees with everything, never pushes back

Multiply each criterion score (1–5) by its weight. A weighted total above 4.0 is a strong candidate. Below 3.0 is a significant concern regardless of how impressive the presentation felt in the room. The rubric exists precisely because presentations are designed to make you feel good.

6.7 Market Timing & Engagement Urgency Assessment

Given Veloxa's pipeline goals and the current agency market, here is our assessment of whether timing favors moving quickly or carefully.

Agency Capacity	MOVE QUICKLY	Quality B2B demand gen agencies at the \$15K–\$25K/month tier are currently at high capacity following a surge in Series B/C company formation. Ironclad Demand in particular shows enterprise account signals that may reduce their availability for a new mid-market retainer within the next 60 days. We recommend initiating contact with all three shortlisted agencies within the next 10 business days.
Agency Pricing	STABLE	Retainer pricing at this tier has been relatively stable. There is no current signal that prices will increase materially in the next 90 days. Budget-based urgency is not a significant factor in the timing decision.
Veloxa's Pipeline Timeline	HIGH URGENCY	Scaling from 18 to 35 sales reps requires pipeline to be in place before the new reps are fully ramped — typically 3–4 months post-hire. If Veloxa's hiring timeline is Q3, an agency engagement needs to start no later than early Q2 to have any measurable pipeline contribution by the time new reps need it. Every week of delay in agency selection is a week of ramp time lost.
Q4 / Year-End Considerations	NOT APPLICABLE	Current timing does not intersect with year-end budget freezes or Q4 procurement constraints. This is not a factor in the decision timeline.

6.8 Honest Assessment: Alternatives to Hiring an Agency

VendorCue.ai's job is to help you make the best decision — not necessarily to validate the decision to hire an agency. Here are the conditions under which you should consider an alternative to the agency path, specific to Veloxa's current situation.

Fractional CMO	Consider if your primary problem is marketing strategy and internal alignment, not execution capacity. If your 4-person team is capable but directionless, a fractional CMO at \$8K–\$15K/month may deliver more leverage than an agency. A fractional CMO can also help you define what an agency should be doing before you hire one — reducing misalignment risk significantly. VendorCue.ai's assessment suggests Veloxa has sufficient clarity on goals to skip this step, but it remains worth noting.
In-House Demand Gen Hire	Consider if you have 12+ months of runway to wait for ramp time and your primary need is channel ownership, not speed. A strong VP Demand Gen hire at \$150K–\$200K/year creates permanent institutional knowledge that no agency engagement does. The tradeoff: 4–6 month ramp, hiring risk, and no immediate output. Given Veloxa's Q3 pipeline urgency, this is not the right primary move — but hiring this role in parallel with an agency engagement is worth serious consideration.
Extend Your Current Approach	Consider if you have data showing that your current motion is working and needs optimization, not replacement. If current outbound is producing qualified pipeline at low volume, the answer may be more SDR headcount and tooling, not a marketing agency. Based on Veloxa's brief, this does not appear to be the case — but it is worth pressure-testing before committing to an agency retainer.
Do Nothing for 60 Days	Consider if you're not genuinely ready to onboard an agency. If your CRM is not set up for attribution, your ICP is not defined, or your sales team is not bought into marketing-sourced pipeline, an agency engagement started today will fail regardless of quality. The 60 days are better spent getting the foundation right. VendorCue.ai recommends doing this internal readiness assessment before signing any contract.

Ranked Decisions. Not Opinions.