

START WITH THE BUSINESS DECISION

WordPress agency evaluation scorecard

Compare evidence, clarify ownership and prepare a useful agency-selection conversation. Use a separate copy for each agency.

Business / website: _____

Agency evaluated: _____

Meeting date and reviewers: _____

Budget range and decision date: _____

Proposed engagement: Project / Discovery or consulting / Ongoing partnership

The three customer tasks that matter most

Describe the observed problem and consequence before choosing a solution.

Customer task	Current problem and business consequence	Systems involved	Current owner
1.			
2.			
3.			

What would success make possible? _____

What must continue working? _____

Agree on must-haves before scoring

A high total cannot compensate for an essential requirement. Examples: a necessary integration, a real deadline, delivery capacity, or acceptable access and handover. Set requirements for your situation.

Must-have	Evidence or agreement needed	Confirmed / open / not met	Owner and next step

Keep an open requirement open until resolved. Record a deliberate tradeoff if leadership changes it.

SCORE THE EVIDENCE

Evaluate the evidence

Scores express your team's judgment. Use the same criteria for each agency, circle one value and record the evidence behind it.

0 - Inadequate

Missing an essential element, unsuitable for your need, or an unacceptable gap.

1 - Partial

Relevant evidence or a plausible approach exists, but specifics or material questions remain open.

2 - Substantiated

Specific, relevant evidence and a clear proposed owner or approach address your need.

U - Unassessed

Not enough information to rate. U is not zero and is not counted as assessed.

1. Business understanding

CIRCLE 0 1 2 U

Ask: A summary of your three customer tasks, current constraints and intended outcomes. A strong answer: The agency understands the website's job and identifies what still needs discovery.

Evidence / source: _____

Why score / open question: _____

Next action / owner / date: _____

2. Relevant WordPress experience

CIRCLE 0 1 2 U

Ask: A comparable project walkthrough with exact platform and agency scope. A strong answer: Experience matches your complexity; WordPress and WooCommerce claims are specifically supported when relevant.

Evidence / source: _____

Why score / open question: _____

Next action / owner / date: _____

3. Team and capacity

CIRCLE 0 1 2 U

Ask: Names or defined roles, availability, cover and specialist arrangements. A strong answer: Required disciplines have an owner; delivery and coordination responsibilities are clear.

Evidence / source: _____

Why score / open question: _____

Next action / owner / date: _____

4. Technical judgment

CIRCLE 0 1 2 U

Ask: A reasoned approach to one representative requirement. A strong answer: Recommendations address requirements, dependencies and maintainability; unexplored details are identified.

Evidence / source: _____

Why score / open question: _____

Next action / owner / date: _____

5. Design and content

CIRCLE 0 1 2 U

Ask: A relevant customer journey or design/content example. A strong answer: Clarity, usability and content connect to a customer task; the client's contribution is explained.

Evidence / source: _____

Why score / open question: _____

Next action / owner / date: _____

COMPLETE THE COMPARISON

Ownership, delivery and scope

Keep evidence and uncertainty beside each judgment. Unresolved must-haves remain separate from the total.

6. Integration and handoff ownership

CIRCLE

0 1 2 U

Ask: A data-flow or responsibility example, such as a form reaching the CRM and sales owner. A strong answer: Responsibility crosses system boundaries, including testing and exception handling.

Evidence / source: _____

Why score / open question: _____

Next action / owner / date: _____

7. Delivery and communication

CIRCLE

0 1 2 U

Ask: A redacted work list and progress update. A strong answer: Priorities, owners, dependencies, decisions, response expectations and escalation are clear.

Evidence / source: _____

Why score / open question: _____

Next action / owner / date: _____

8. Testing and release

CIRCLE

0 1 2 U

Ask: Acceptance criteria and verification for a comparable completed change. A strong answer: Important journeys are checked; approval, release and recovery responsibilities are explicit.

Evidence / source: _____

Why score / open question: _____

Next action / owner / date: _____

9. Measurement and learning

CIRCLE

0 1 2 U

Ask: A report connecting work to an agreed business measure. A strong answer: Activity, outcomes and attribution stay distinct; tracking limits and the next decision are clear.

Evidence / source: _____

Why score / open question: _____

Next action / owner / date: _____

10. Commercial scope and continuity

CIRCLE

0 1 2 U

Ask: Inclusions, exclusions, client duties, change process, access and handover terms. A strong answer: You understand what you are buying, remaining responsibilities and how work continues or ends.

Evidence / source: _____

Why score / open question: _____

Next action / owner / date: _____

Assessed criteria: ____ of 10 Points: ____ of ____ possible (assessed count x 2) _____

Unassessed criteria / unresolved must-haves: _____

This original worksheet is not a validated predictor of agency performance. There is no recommended pass score. Do not compare raw totals for incomplete assessments. Compare evidence across the same criteria and resolve material gaps. Technical capability alone does not establish fit for your scope, operating style or budget.

DEFINE WHO OWNS THE OUTCOME

Responsibility checklist

Complete this together. Name one accountable owner for each applicable responsibility, even when several people do the work. Identify client approvals, other providers and exclusions explicitly.

Responsibility	Accountable owner	Who does the work?	Client approval / input	External provider / exclusion
Business priorities and budget				
Work planning and progress reporting				
Brand, design and customer experience				
Copy, subject expertise and content approval				
WordPress development and configuration				
SEO and important URL/content changes				
Integrations and data-flow exceptions				
Form delivery, CRM routing and sales follow-up				
Analytics definitions and event verification				
Testing, release approval and recovery				
Routine WordPress, theme and plugin updates				
Hosting, backups and restore coordination				
Specialist security escalation, if applicable				
Licenses, accounts and access administration				
Documentation, handover and end-of-engagement work				

Routine website work, hosting and specialist cybersecurity may belong to different providers. The purpose is clear coordination; one agency does not need to supply every service.

Ownership gaps to resolve: _____

Decision owner and next review: _____

CLARIFY THE AGREEMENT

Compare the scope and decide

Use this page to turn remaining questions into an explicit next step.

Item	Proposed arrangement	Clarification needed
Project outcome or ongoing objectives		
Deliverables or delivery capacity		
Initial priorities and prerequisites		
Price, payment and third-party costs		
Client input and approval expectations		
Routine response and urgent escalation		
Additional work and priority changes		
Acceptance, handover and continuing access		
Review points and end-of-engagement arrangements		

Illustrative evidence note, not a client example: Criterion 7 scores 1 when a weekly update is useful but urgent-issue ownership and staff-absence cover remain undefined. Next action: request escalation and cover arrangements. A polished presentation does not resolve those gaps.

A short exercise for the meeting

Hypothetical situation: A customer submits a quote form. The site displays success, but sales cannot find the inquiry. Ask who owns the investigation and next update, how the failed handoff is located, which providers are involved, how receipt by sales will be verified, and what documentation or monitoring would help identify a recurrence.

Evaluate reasoning and ownership. This is not a request to diagnose an unseen system or guarantee a resolution time.

Record the decision

Decision: Continue evaluation / Request revised scope / Shortlist / Do not proceed

Reasons supported by evidence: _____

Remaining conditions: _____

Next meeting / decision owner and date: _____

Bring the completed worksheet to a conversation about your website.

[Explore AV Social's WordPress services](#) | [Start a website conversation](#)