

# Dental Marketing Agency Due Diligence Checklist

A practical scorecard for dental practice owners comparing marketing agencies, website providers, Google Ads specialists or full-service growth partners.

Created by Wise Agency. Use this to assess any dental marketing agency, including Wise. Score based on proof, not confidence.

## How to score agencies

Give each area a score from 0 to 5 based on evidence. Ask for proof such as dental case studies, sample reports, landing pages, CRM workflows, speed results, creative examples and lead quality tracking.

Score	Meaning
0	No answer, no proof, or the agency avoids the question.
1	Very weak. The answer is generic and could apply to any industry.
2	Basic. They understand the idea, but cannot show much relevant evidence.
3	Acceptable. They can explain the approach and show some relevant examples.
4	Strong. They have a clear process, relevant examples and sensible reporting.
5	Excellent. They can show proven dental-specific work and connect it to enquiries, lead quality and revenue.

## Agency scorecard

Criterion	Score 0-1	Score 2-3	Score 4-5	Your score
<b>Dental-only experience</b>	No dental examples, or only vague claims.	Some dental work, but limited depth or proof.	Clear dental specialism with examples, results and sector understanding.	/5
<b>Treatment-specific campaigns</b>	Same strategy for every treatment.	Some treatment awareness, but limited campaign detail.	Can explain different strategies for implants, Invisalign, cosmetic and general dentistry.	/5
<b>Website speed</b>	No speed focus or no mobile performance discussion.	Basic optimisation, but no clear speed standards.	Builds fast-loading, mobile-first sites and understands how speed affects conversion.	/5
<b>Landing pages</b>	Sends most campaign traffic to the homepage.	Uses some landing pages, but they are basic or generic.	Builds dedicated landing pages by treatment, audience and campaign intent.	/5
<b>CRM integration</b>	Leads go into an inbox with little follow-up visibility.	Basic form capture or call tracking.	Connects forms, calls, CRM workflows and follow-up reporting properly.	/5
<b>Reporting quality</b>	Reports mainly clicks, impressions or traffic.	Reports enquiries, but limited commercial context.	Reports enquiries, cost per lead, lead quality, booked consultations and recommended actions.	/5
<b>Lead quality tracking</b>	Counts every enquiry as equal.	Some lead notes or basic feedback.	Tracks source, treatment interest, quality, outcome and wasted spend.	/5
<b>Creative quality</b>	Relies on stock images or basic templates.	Can create acceptable graphics, but little testing or treatment focus.	Produces credible dental creative for ads, landing pages and treatment campaigns.	/5

<b>Criterion</b>	<b>Score 0-1</b>	<b>Score 2-3</b>	<b>Score 4-5</b>	<b>Your score</b>
<b>Compliance awareness</b>	Makes bold claims without caution.	Basic awareness of responsible messaging.	Understands dental advertising risks around claims, images, pricing, finance and consent.	/5
<b>Commercial strategy</b>	Talks about clicks, not revenue.	Understands lead generation, but not the wider practice model.	Connects campaigns to treatment value, chair capacity, conversion rates and growth goals.	/5

## Questions to ask before signing

#	Question	Notes
1	How many dental practices have you worked with?	
2	Can you show examples of dental websites, landing pages or campaigns?	
3	Do you specialise in dental, or do you work across many industries?	
4	How would you market implants differently from Invisalign?	
5	Do you build separate landing pages for campaigns?	
6	How do you track calls, forms and WhatsApp enquiries?	
7	Can you integrate leads with our CRM or follow-up process?	
8	How do you measure lead quality?	
9	What does your monthly reporting include?	
10	Who writes the copy?	
11	Who creates the ads and campaign creative?	
12	Who builds the website or landing pages?	
13	How quickly do your websites and landing pages load?	
14	What happens if leads are poor quality?	
15	How do you optimise campaigns after launch?	
16	How do you approach dental advertising compliance?	
17	What do you need from our team?	
18	How often will we speak?	
19	What are the contract terms?	
20	What would make us a bad fit for your agency?	

## Red flags

#	Red flag	Seen?
1	Cannot show dental-specific examples or explain dental patient journeys.	
2	Promises guaranteed patients or guaranteed results without context.	
3	Focuses only on impressions, clicks, traffic or reach.	
4	Sends all paid advert traffic to your homepage.	
5	Does not track phone calls or lead sources properly.	
6	Does not ask about treatment value, capacity or commercial goals.	
7	Ignores reception follow-up, CRM usage or enquiry handling.	
8	Celebrates lead volume without checking lead quality.	
9	Uses generic stock images and template ads.	
10	Cannot show an example report.	
11	Locks you into long contracts without clear performance visibility.	
12	Uses the same campaign structure for every treatment.	
13	Avoids questions about commercial return.	

## Final decision notes

Question	Notes
What did the agency explain well?	
What felt unclear?	
What proof did they provide?	
What risks remain?	
Would we trust them with high-value treatment campaigns?	
Overall score	/50

### Need help reviewing an agency proposal?

Wise can review your current website, ads or marketing proposal against this checklist. WhatsApp Wise: [https://api.whatsapp.com/send/?phone=447508555106&type;=phone\\_number&app;\\_absent=0](https://api.whatsapp.com/send/?phone=447508555106&type;=phone_number&app;_absent=0)