# The PR Agency Readiness Checklist

## *For Tech Companies in the Retail Ecosystem*

Are you ready to hire a communications agency?
This checklist outlines five steps to consider before bringing on an ideal partner.

By Aster Agency, formerly Ketner Group Communications

ASTER AGENCY

### A NOTE ON OUR NAME

You may know us as Ketner Group, now we're Aster Agency, a Hawke Media company. We're the same team you've trusted for decades, simply evolved to reflect our new chapter.



# Are You Ready to Master a Strategic Communications Program?

Every industry is experiencing rapid evolution with the rise of AI. But if you're part of a technology company that's transforming how people buy, you know that opportunity is particularly ripe in your ecosystem.

According to McKinsey, building up digital and AI capabilities adds real value:

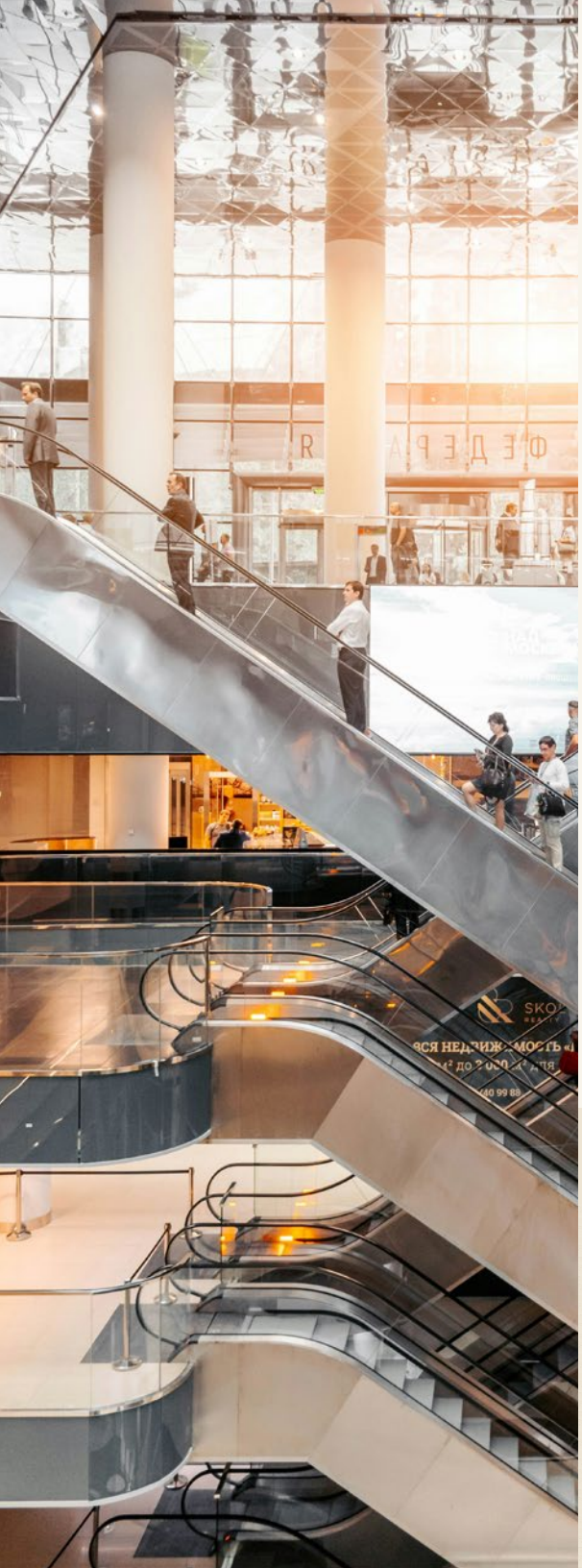
**CPG and retail leaders in digital and AI perform three times better than their peers.**

And the investment is accelerating: the share of retailers actively deploying AI jumped from 42% to 58% from 2025 to 2026, with 89% saying it's already lifting revenue (NVIDIA).

To keep pace with the competition, retail technology companies need to gain exposure in their areas of expertise and expand their share of the market.

How?

With a robust communications strategy that builds recognition, earns validation and drives sales.



# *What's the role of communications in an overall business strategy?*

Communications programs deliver three kinds of value to tech companies:

### RECOGNITION

PR is a top-of-the-funnel tactic that amplifies your voice where buyers are now making decisions. Today, twice as many buyers named generative AI or conversational search as their most meaningful research source (Forrester), and earned media makes up 84% of the sources AI tools cite (Muck Rack) — so consistent PR is what gets you named in the AI answers your prospects trust.

### VALIDATION

PR affirms the technology in the media, among peers and from analysts, and gives board members confidence. In fact, 95% of B2B hidden buyers (or those who influence the buying decision behind the scenes) say strong thought leadership makes them more receptive to a vendor's sales and marketing outreach (Edelman-LinkedIn).

### SALES

PR that clearly demonstrates a tech company's value can generate leads and support long sales cycles. It pays off in the pipeline, too: 79% of hidden buyers say they're more likely to advocate for a vendor during the RFP process when that company consistently publishes strong thought leadership (Edelman-LinkedIn).

**KNOW THE RISKS OF SKIPPING THE CHECKLIST**

It doesn't pay to rush into any relationship, and PR is no different. This checklist is designed to help you find the right partner and build a
long-term relationship.

Skipping steps in the checklist can create unnecessary bumps in the road by:

- Setting unrealistic expectations.
- Losing C-level executive support.
- Driving gaps in communication.



## *How does PR impact different types of companies?*

Ahead of the checklist, understand that all tech companies might be on different PR paths. For example, consider these two companies:

**EARLY-STAGE INNOVATOR**

A startup with computer-vision technology needs PR to increase awareness and validate the solution. The company has a website but no blog content, and it needs to build momentum through content creation and recognition in the media.

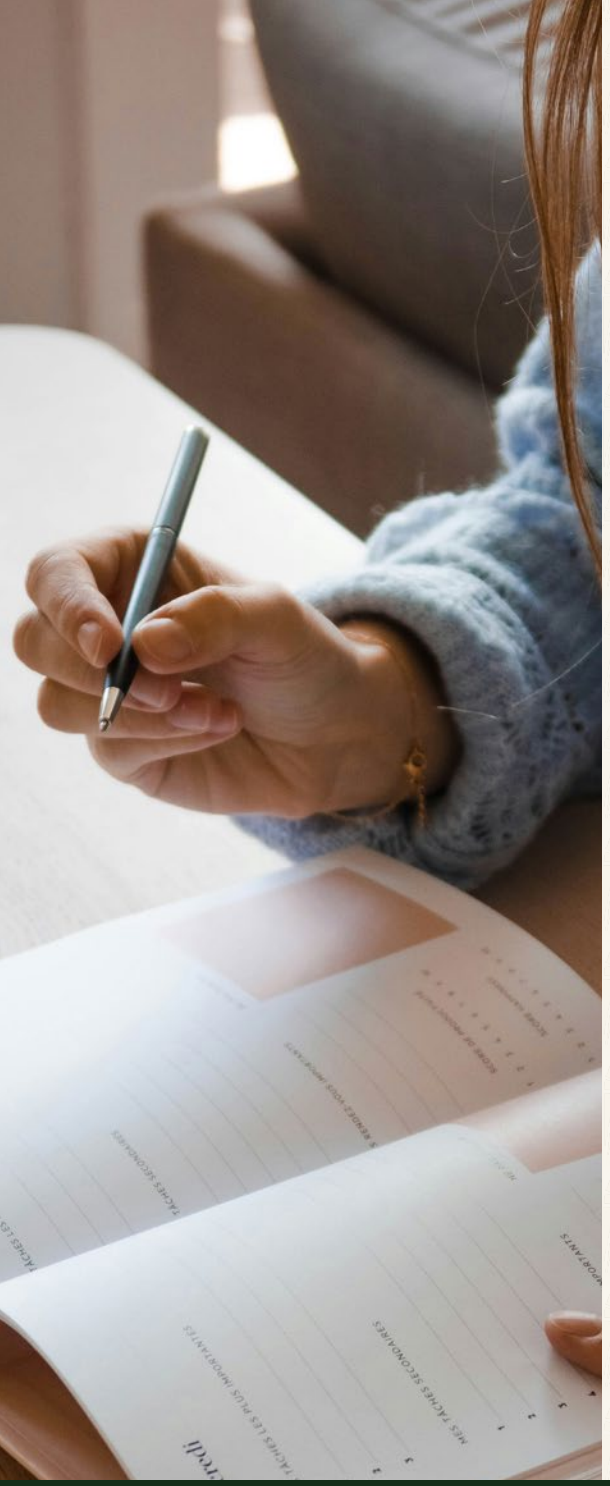
**ESTABLISHED SOLUTION**

A company with a long-running SaaS platform for supply chain efficiency is looking to be acquired. The company has a fully developed marketing arm, including an in-house communications team, but wants to amplify its voice further among analysts and on conference panels.

Whether you're an established provider or an early-stage innovator, it's important to know how you're positioned in the market, and then follow the checklist to see if you're ready for a full-scale PR program.

**IF YOU'RE NOT READY FOR PR YET, YOU CAN STILL START PREPARING.**

If you don't meet every item on the checklist, PR can be outsourced in the short term to help meet specific needs. The Early-Stage Innovator may want to first build a content library before investing in PR. Outsourcing content to a communications agency helps them first build their resources and then evolve into a broader PR retainer.



# The PR Agency Readiness Checklist

Before you launch a strategic communications program, you need to see where you are. We have created a short PR Agency Readiness Checklist to guide you through the process.

Here are the five steps we recommend to prepare for a true partnership:

**STEP 1**
Finalize Your Marketing Strategy and Team

**STEP 2**
Identify PR-Specific Goals

**STEP 3**
Receive Executive Buy-In

**STEP 4**
Confirm the Budget

**STEP 5**
Define the Qualities of an Ideal PR Partner

STEP ONE:

# Finalize Your Marketing Strategy and Team

The first — and arguably most important — step is pulling together a marketing strategy and assigning a team to work with an agency.

**Without a marketing plan, you don't know where PR fits in.**

**Without a marketing team, you can't direct a PR agency.**

It sounds simple, but many companies fall short in overall marketing planning before slotting in a strategic communications program.

A company needs to define its overall goals (lead generation, brand awareness, thought leadership, etc.) and outline all the various efforts it will deploy to get there (demand generation programs, paid sponsorships or trade shows, etc.).

A strategic communications agency won't need every detail of the plan, or to know everyone on the team, but it does need to know you're prepared and thinking about the story you want to tell. It's best if a marketing team can come to an agency with resources, reports, sell sheets and a fleshed-out marketing calendar to work from.

Then the PR team can help write your story.

**CONSIDER YOUR NARRATIVE IN THIS WAY**

- First, identify your brand and style guidelines.
- Second, list topics and themes that you want to be considered an expert on.
- Third, clarify your opinions on key issues by building out a detailed messaging document.
- Finally, strategize how your powerful ideas might get implemented into content and PR.



STEP ONE:

# Finalize Your Marketing Strategy and Team

## *Assign Marketing Roles*

Before getting started, you'll need to identify your key players in a strategic communications partnership:

**LEAD PARTNER**

Often, an agency will say they need a point of contact (POC), but a communications relationship needs more than "just a contact" to foster growth for the client; it needs a true partner. This lead collaborator, typically a marketing or communications leader, should be someone who can facilitate strategy, build a quarterly marketing calendar and act as a liaison between the PR agency, the CEO and subject matter experts (SMEs). The ideal lead partner is decisive and empowered to direct the PR relationship. Note: A CEO cannot be a POC, as they don't have time to dedicate to an agency!

**SMEs**

Gather leaders within the organization who can be experts on topics. The SMEs must have time available for reviewing articles, responding to quick media opportunities and completing exploratory phone calls on topics and ideas.

**SPOKESPEOPLE**

SMEs arm PR teams with thought leadership to bring to the media, and they can often be spokespeople. If not, companies need to dedicate media-trained spokespeople to get in front of reporters and cameras.



STEP TWO:

# Identify PR-Specific Goals

Now that you've finalized your marketing plan and team, it's time to translate your business goals to communications goals.

An agency can help define the right metrics and KPIs, while setting expectations, as PR can be a long game. Getting this right matters — 69% of communications pros say producing measurable results is the single best way to prove PR's value to leadership (Muck Rack, State of PR 2026).

For example, let's consider our companies:

### EARLY-STAGE INNOVATOR

Since building momentum is key, the Innovator may want to create a goal to increase thought leadership within publications that reach prospects. They can set a goal for how many pieces they publish quarterly, as well as measure speaking opportunities and award wins for the CEO.

### ESTABLISHED SOLUTION

For a company looking to be acquired, the Established Solution might focus on increasing its share of voice (SOV) against key competitors. The company will want a leadership position in SOV to be seen as an industry driver.




"Technically, PR is considered top of the funnel in the sales and marketing world. However, if used as part of an integrated marketing plan, it can be an influencing factor in turning the heads of just the right prospect at the right time." —Looking for PR to drive leads? Read this blog for more.

STEP TWO:

# Identify PR-Specific Goals

## *Consider a First Year of Partnership: NIQ*

NIQ (NielsenIQ) is the world's leading consumer intelligence company. When we first spoke in 2024, the brand was globally recognized for its data but needed a North American communications program to turn that data into consistent, measurable coverage across six verticals.

We built the full infrastructure in the first year, incorporating media relations, a byline program, press releases, event coordination and a media newsletter. Our results included:

- **200+ media mentions** in 2025
- A **20% increase in share of voice** against key competitors
- **750+ media relationships** built across the U.S. and Canada
- Inbound requests from **Bloomberg, The Wall Street Journal, Forbes, Today,** and **CNBC** — as many as 20 per week
- A media newsletter grown from scratch to an 85%+ open rate



"From the beginning, Aster Agency has been an impressive, strategic and thoughtful partner. We have a massively complex business that relies heavily on content and thought leadership to break through. They helped us craft and execute a strategy that translated our thought-leadership investments into meaningful gains in both the quantity and quality of our media coverage."

— Kenny Juskowiak, Global Head of Product Marketing at NielsenIQ (NIQ)

STEP THREE:

# Receive Executive Buy-In



Too often marketing teams do the groundwork and are ready to onboard a PR agency, only to receive a last minute request from a senior executive to not move forward with the scope of work.

Reasons for this situation can include:

- The executive had previously been burned by a PR relationship.
- They're not comfortable dedicating a budget to a strategic communications program.
- The leader doesn't fully embrace the influence PR can have on a business.

After building a plan and defining goals, it is now a good time for a marketing leader to present PR as a valuable piece of the marketing team and get the green light from a top-level executive.

**GK SOFTWARE: HOW EXECUTIVE COMMITMENT DRIVES BUSINESS RESULTS**

GK Software had built a world-class, cloud-based retail technology suite and a strong track record in Europe, but nearly 10 years ago, in North America, it was unknown. GK selected Aster Agency as its outsourced North American communications support, and we built the program from the ground up. GK is now a wholly owned subsidiary of Fujitsu, which valued the GK brand so highly it preserved the name.

**AFTER NEARLY A DECADE, GK IS THE NO. 1 NEW POS PROVIDER GLOBALLY AND CAPTURED:**

- **27.8% revenue growth**, the fastest among major POS vendors.
- **~200 pieces of coverage** in recent years, plus **12+ bylines** annually.
- **20+ analyst briefings** per year, contributing to leadership recognition from Datos Insights, IHL Group, IDC and Forrester.

STEP FOUR:

# Confirm the Budget

Having received the executive team's blessing to seek a PR agency, a marketing leader next looks at where PR fits within the budget. The marketing lead may also be earmarking funds for various tactics such as:

- Sales support: conference attendance or print
- Freelancers and agencies: graphic designers, SEO support, etc.
- Demand gen: paid advertising programs or ABM

**EARLY-STAGE INNOVATOR**

A young startup may not have the resources for a full-scale PR program, so maybe a marketing team needs to present a smaller option just to build out blogs and content, then grow the PR relationship to include media and analyst relations.

**ESTABLISHED SOLUTION**

Wanting to stay top-of-mind and maintain a valuable leadership position for board members, the established company launches a fully backed monthly retainer that deploys all tactics in the PR toolbox.

## *Find the Right Match*

The reality is that budgets vary dramatically from tech company to tech company.

Identifying the right agency for you is about finding an agency partner that serves companies with the budget you've outlined.

It's also helpful to set aside a fixed monthly retainer as PR requires an investment in time, building relationships, pitching and staying in front of journalists. Make sure the budget matches the goals you set earlier.



**Planning a content-focused partnership?**

**TIPS TO KNOW**

- Create a tone document with keywords for SEO/GEO.
- Identify reports or internal research to feed content.
- Spread the content across tactics (social, newsletters, sales team emails, etc.).

For more tips, read this blog on how to upgrade your B2B content.

STEP FIVE:

# Define the Qualities of an Ideal PR Partner

With goals and budget in mind, let's find a match. What qualities are you looking for? As in any relationship, a company has certain values and preferences that it will seek in a partner.

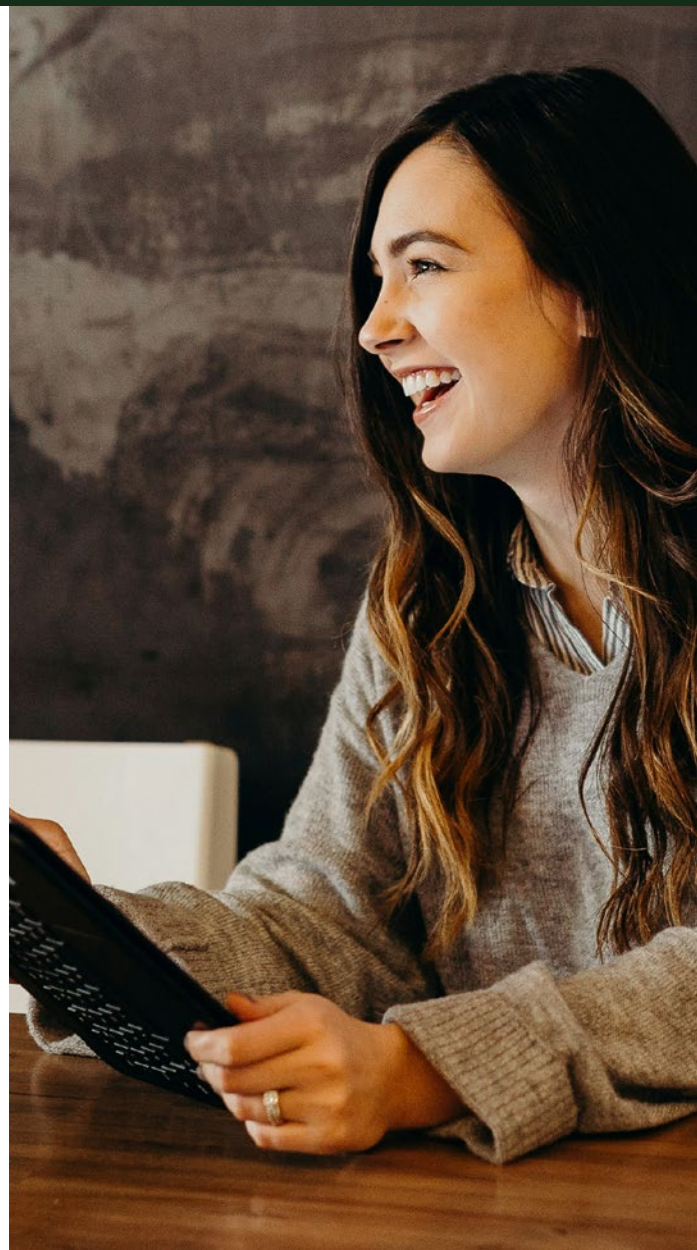
Here are a few things to consider when looking at a cultural fit:

**EXPERTISE**
Are you looking for a specialized agency? For example, at Aster Agency, we have specialized in retail technology for more than two decades.

**LOCATION**
Do you want an agency that's local to you or with remote offices around the country?

**SKILL SET**
What do you need most, an agency that produces great content or one with more top-tier media contacts for broadcast coverage? Or a combination of the two?

**SIZE**
Are you seeking a large company that has clients in all areas and teams across the country, or a smaller boutique agency that deeply understands your industry? Even smaller than that, maybe you want a single freelance PR person to assist the company.



STEP FIVE:

# Define the Qualities of an Ideal PR Partner

Let’s consider our two companies again:

### EARLY-STAGE INNOVATOR

Being a startup with an eye on coverage, an early-stage company might seek an agency to initiate an effective PR strategy, mixing content, awards and speaking opportunities to ramp up its awareness in the industry.

### ESTABLISHED SOLUTION

Working alongside its own corporate communications department, the established platform may want an agency to execute a full-scale communications plan that wins ownership of SOV. The company might seek an agency with top-tier media connections, analyst relations and content that cements the company’s place as a market leader.

## Consider a Specialist Agency

Companies can benefit from agencies that focus on one category like retail tech, as they have built up connections to influencers and analysts in the sector.

Those relationships matter more than ever: 71% of communications pros cite low journalist response rates as a top challenge and 61% point to shrinking media lists, with just 2% saying earned media hasn’t gotten harder to secure (Muck Rack, State of PR 2026).

An agency with established relationships cuts through that.

See this blog on why to hire a retail-tech focused agency.



# Extra Tips for Selecting a Partner

**Give it time:** Know that a search can take weeks, so budget plenty of time from search to your ideal start date with a PR agency.

**Avoid waiting to hire until you have an announcement:** A common mistake is waiting until the last minute to hire a PR agency to help promote a big company announcement. This fire-drill approach doesn't give a communications firm proper support or ample runway, and the announcement never reaches its full potential.

**Consider when you'd like to see results:** As a search begins, it can be useful to keep in mind when you'd like to ultimately see results from an agency partner. You can use that as an indicator to help you plan out enough time to do a proper search. Remember, once you find an agency you like, results don't happen overnight. For example, want a thought-leadership post in a publication? The time it takes to: pitch a topic, interview an SME, write, review, edit, submit to an editor and then wait for a publication to go-live with a piece could be up to three months.



# Are You Ready to Find Your Ideal Partner?

Congratulations! With all the boxes checked and a firm idea of what you're looking for in a PR agency, you can begin your search for the perfect PR partner.

No matter the life stage of your company — early-stage innovator, established solution providers or a company in between — come prepared and find your match.

This checklist is designed to prepare you for upcoming calls and give you confidence when meeting initial agencies.

Above all, the key to a successful program is finding the right team to tell your story.



> "Aster Agency understands the complexity of global supply chains, and they know how to position us as go-to resources for media covering the biggest stories today, like AI and tariffs. They're not just another vendor — they are a true part of our team."
>
> — Mark Burstein, SVP Americas at Inspectorio

# How Aster Agency Helps You Grow Your Business

The Aster Agency is the only communications agency with 30 years of expertise in technology that powers the buying experience. We work as part of your team, building real relationships, smart strategy and sustainable growth through what is undoubtedly the biggest technological shift of our time.

Our clients describe us as strategic partners, not vendors. Many of our client relationships span more than a decade. In fact, client contacts often bring us to their next company. That longevity reflects consistent delivery, genuine relationships and the kind of trust that only builds over time.

Whether you're breaking into the U.S. market, preparing for a funding round or building ongoing visibility, we'd love to hear about your goals.



## *Let's Talk*


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