Clarity Before the Spend

How to prepare before you hire a partner, and get the best match

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Why I wrote this

I spent eighteen years in the strategic-creative consulting services space (aka “the agency side”), building and leading teams whose job was to create value for the companies that hired us. Somewhere in there I stopped believing the biggest problem was on my side of the table.

We could bring our absolute best and still watch a project fail or drift, because the client did not frame their problem correctly or know how to work with a firm like ours. Not through any fault of character. They had simply never been taught, and nobody had written it down.

The single biggest determinant of a project’s success is the buying company’s own understanding of how to prepare for, hire, and work with an outside partner. Everything in this guide follows from that.

If part of your job is hiring designers, strategists, engineers or brand people, this guide is for you.

01

The buyer is the bottleneck

The constraint on great work is rarely the maker. It is almost always the buyer.

That is not a criticism. It is a structural fact, and it has gotten more true rather than less. As the tools get faster at producing options, the bottleneck moves further upstream, toward the judgment about which option matters and the organizational nerve to carry it through. A consulting partner firm can only deliver what your company is prepared to receive.

The good news in that sentence is the word *prepared*. It is within your control, and most of it can be done before you talk to anybody.

02

What failure or drift looks like

Projects rarely fail all at once. They fail by degrees, and the patterns repeat.

The work never ships. You bought something you cannot use. A total write off.

It ships unrecognizably. So many hands touched it between conception and release that the intent is gone. The nuance went first. Looking back, you would have run the project differently, or not at all.

The relationship sours and someone pulls the plug. Money is wasted, but the real cost is that you are no closer to the thing you needed.

It gets you halfway. Your partner met the terms of the agreement and you still have months of work left, with no budget and no people to do it.

You got the wrong answer. The market zigged, you zagged. Customers see it and scowl.

You solved the wrong problem. Resources went to the wrong part of the system and the real obstacle is still standing.

Most projects that disappoint do not implode. They just take longer, cost more, and land softer than you hoped. That is the common case and it is the one worth preventing.

03

What a good partnership does for you

It gives you a capability you do not have, immediately. You could build it internally. That takes time you may not have. A good partner has already done the thing several times.

It tears down the walls your org chart built. Outside firms get called in to unstick things that have been stuck for months: competing factions, exhausted leadership, an initiative that has become an albatross. Outsiders can build coalitions that insiders cannot, because they are not affected by biases and internal politics.

It brings rigor. Agencies live on time and materials, so process discipline is survival rather than virtue. Detailed plans, defined roles, schedules people keep. Dropped into an organization used to churn, that alone changes the pace. The best clients raise their own game to match it.

It tells you the truth. Inside a company, opinions herd toward what leadership seems to want. That is rational career behavior. An outside partner is not playing the same long game, and can say your process is broken.

It brings what I think of as the alien factor. We may not know your industry or your language, and that is part of the value. Your ironclad assumptions are not ironclad to us. The best new ideas usually sit right next to an old unremarkable one, and an outsider can see the adjacency because they are not standing in the shadow of habit.

The trick is holding two things at once: familiar enough to be trusted, novel enough to be worth paying for. Firms that only offer one of those are either comfortable or unusable. AI is driving the world to high familiarity, low novelty (statistically safe, distinctively empty).

04

The first decision: capacity or capability

This is the question that sends everything else in the right or wrong direction, and it is easy to get wrong because the pressure usually pushes one way.

Capacity means you know what to do and need more hands. Images cropped, copy produced, a known process run at volume. If you have a clear plan and people to direct the work, hire contractors or a staffing firm. Keep it simple, time and materials, no elaborate statement of work.

Capability means you do not know how to do the thing. Here a contractor will not save you, because you would be directing work you cannot evaluate. What you need is a partner who helps define the problem rather than only solving it, who can bring recommendations and sometimes direct your own people and break new ground together.

What has changed, and it changed recently. Capacity is now cheap. A great deal of the work that used to justify extra hands is automated or nearly so, which means the honest answer to “do we need more people” is more often no than it was five years ago. The value has moved almost entirely to capability, judgment, and taste. If you are buying hands in a market where hands are abundant, you are paying for the wrong thing.

Staff augmentation, done badly and done well. Placing bodies on your team to use as you like looks like the easy button. Designers and engineers rarely love it, because they joined a firm to do the harder work, and a GPU cluster ends up running spreadsheets. That is the common case and it is worth avoiding.

Done well it is a different thing, and in practice it has a different name: an embedded team. Senior people who chose this model rather than tolerating it. Working inside your engineering or product organization rather than parked beside it. Accountable for an outcome rather than for hours. The difference is not the contract structure, which looks similar either way. It is whether the people arriving have signed up for this kind of work, and whether you have given them somewhere real to stand.

This is often the right shape when you need capability now and intend to build the permanent team deliberately. You get senior judgment immediately, your own hiring stays on your timeline rather than the project's, and you are not carrying a team after the problem it solved has gone.

Two questions to ask any firm proposing it. **Did these specific people choose this kind of engagement, or were they assigned to it?** And **who owns the outcome, us or you?** A firm that answers the second one with "you do" is selling you hands, which we established a moment ago is the thing you least need to buy.

Before you hire anyone, ask what your current team could do with better leadership, better tools, or less bureaucracy. Sometimes the answer is a lot. Throwing people at a problem that is actually a process problem makes the process problem more expensive.

And the golden rule, which deserves its own line.

IF YOU LET EXPERTS BE EXPERTS, EVERYONE WINS.

Having knowledge and no freedom to deploy it is uniquely dispiriting. If you hired someone because they know something you do not, prescribing their method removes the reason you hired them.

05

Do you need an outside partner at all?

Worth asking, because the answer is sometimes no, or not the kind of partner you thought.

Doing it yourself may be the better move when the capability is central to your long term strategy, when you have internal champions with the time and authority to build it, and when leadership will accept a realistic timeline. Institutional knowledge you build stays. Knowledge you rent leaves.

Outsourcing becomes a risk when it delays you from developing something you will need forever, or when it is chosen because it is politically safer than the internal fight.

Watch for pressure from above. Urgency is sometimes real. It is also sometimes the visible symptom of bad planning, and hiring a firm to absorb it converts a planning problem into a budget problem.

Six questions worth answering out loud:

- Do we have internal champions with the knowhow, time and authority to build this?
- Is this capability essential to our long term strategy?
- Will outsourcing delay us from developing knowledge we will need?
- Is the urgency real, or is bad planning the real problem?
- Are we hiring outside because it is smarter, or because it is safer?
- Will leadership fund training and accept a reasonable timeline?

06

Key questions to answer before you brief anyone

These are the ones that change what you should buy.

Vision and intent

1. **Do you already have the right answer?** If you do, you need execution. If you do not, and you brief as though you do, you have bought the wrong engagement.
2. **Can you paint the picture of where you are going?** If not, that is the first thing to buy.
3. **Is there consensus internally on what you are trying to accomplish?** Absence of consensus does not stop a project. It surfaces late, expensively.

Project type and risk

1. **Is this innovation, or is it improvement?** They need different partners, different timelines and different tolerance.
2. **What is your actual tolerance for risk?** Not your stated one.
3. **Is there prior experience to build on, or is this the first attempt?**

Skills and systems

1. **Do you have the specialized skills to deliver, once the thinking is done?** Strategy you cannot execute is a document.
2. **Can your teams play together, or do you need a conductor?**

Internal dynamics

1. **How do senior leaders need to be involved?** Decide before, not during.
2. **How will you protect your partner from red tape and swirl?** This is a real job and it needs an owner.
3. **Where is internal collaboration essential to success?** Name the teams now.

07

The mistake almost everyone makes to some degree

Skipping definition and transparency.

Most briefs are undercooked, and the people writing them are usually the last to know. Clients rate their own briefs far higher than the firms receiving them do, and almost nobody closes that gap before the money is committed. That gap is not a communication problem. It is the single most expensive habit in this industry.

Definition is the work of establishing what the problem actually is, what is driving it, what constraints are real, and what success would look like. It is unglamorous and it is where the money is saved.

Five reasons companies skip it, all of them understandable:

Impatience. Output gets mistaken for progress. A deck arriving feels like movement.

False confidence in the framing. Deep familiarity with your own business is not the same as clarity about the problem. It is often the obstacle to it.

Misunderstanding what design is. It is not decoration applied late. It is how a thing works and whether a person will accept it.

Fear of what definition surfaces. Ask hard questions early and you may find the project is not the project, or that a colleague disagrees more than anyone admitted.

Budget anxiety. Trying to hit a number, companies trim the cheapest looking phase. It is the one that determines whether the rest is spent well.

08

Prescriptive briefs, and why they backfire

A brief sometimes arrives with phases, activities, deliverables and a staffing plan already specified, usually so proposals can be compared side by side.

The problem is that good firms solve the same problem differently, and asking one to adopt your assumptions instead of their method makes it much harder for them to stand behind the result.

It is like hiring a builder and handing them the schedule. Electricians in week two, plaster in week three, inspection on the Friday. They know why that order does not work. If they follow it anyway because they want the job, you will pay for the rework, and it will be your sequence that caused it.

A firm facing an inflexible client has to decide whether it wants the project at all, what the inflexibility will cost, and how to price it. The good ones sometimes walk. The alternative is a partner privately thinking: I do not believe in this approach, we have never worked this way, and I cannot afford to say no. That is not who you want in the room.

It almost never needs to be this way. A brief that states the problem clearly, gives context on what is driving it, and names the must-haves of the partnership model will produce proposals you can compare easily and fairly.

And a note on procurement. Buying expertise the way you buy office supplies, lowest price wins, is a category error. One proposal being ten percent higher because it includes testing with real users is not more expensive. It is differently scoped, and possibly the cheaper of the two.

09

Defining success before anyone starts

Creative teams cannot aim at a target nobody agreed on. Use both halves: numbers and picture.

NUMBERS

Pick the few that matter rather than the many you can measure. Task success and time on task. Error rates. Adoption and onboarding completion. Conversion and where people drop out. Accessibility against a real standard. A short list people actually watch beats a dashboard nobody opens.

And watch for adjacent metrics that will kill your project without anyone announcing it. Work can clear every stated requirement and still die late, because manufacturing is measured on cost per unit, or support on ticket volume, and nobody thought to mention it.

So ask early: what do manufacturing, engineering, support and legal care about, and what incentives drive them? **If your partner does not ask that question, ask it yourself.**

PICTURE

Three tools that work better than they sound.

A north star. Describe the ideal outcome in vivid, concrete terms and write it down. Peter Senge calls the effect creative tension, an elastic band pulling people toward the goal. It also surfaces disagreement early, which is the point.

Futurecasting. Two years out, the project is a triumph. Now it is a disaster. Explore the drivers of both. Write the five star review and the one star review. The gap between them is your risk register.

Prototype the story. Before prototyping the product, make the fake marketing page. Headline, value proposition, three bullets, a user quote. If you cannot write a compelling version, the idea needs more work. The draft doubles as an alignment tool.

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Align your own team before you hire anyone

Ed Catmull at Pixar said that getting the team right is the necessary precursor to getting the ideas right. The same is true of money.

The most common cause of wasted spend is not a bad partner. It is that the people who would inherit the work were not in the room when it was shaped.

This happens because outside firms are usually hired to cut across the org chart. They are brought in to challenge assumptions and break silos, and that is exactly what makes them useful. It is also what makes them easy to reject.

They do not follow your org chart and they do not know your unwritten rules. If you have not brought your own teams along, especially the ones who will own implementation, you have arranged a collision.

Ask who inherits what your partner will create. Ask what they will need. Then bring them in as collaborators rather than as reviewers. Early input is almost always welcomed. Late input arrives as a veto.

A CHECKLIST FOR THE TWO WEEKS BEFORE YOU BRIEF

Describe the initiative. A short written description: objectives, outcomes, the metrics, known risks, and what changes from current practice. Name dependencies in legal, technical, manufacturing, marketing.

Map stakeholders and dependencies. Everyone affected, directly or indirectly. Where you depend on people outside your team. Constraints they will introduce.

Sort them by involvement. Not impacted. Keep informed. Input or approval needed. Deep collaboration. Co-defining the project. Most mistakes here are putting someone one level too low.

Meet them and listen. Share the working brief, the goals, the metrics, the open questions. Ask for risks, dependencies and ideas. Note any incentives that conflict with yours, because those are the ones that surface last.

Build the collaboration plan. Roles across the virtual team. A cadence people can keep. When and how feedback will be requested. Where your partner will need access or cover.

Confirm alignment. Summarize what you heard, adjust, resolve what is open. Then brief.

11

One more thing about who you hire

No single firm covers the whole lifecycle well. Brand, research, prototyping, detailed design, engineering, validation, launch, growth. The full service promise is largely finished, and most large companies already work with several partners because of it.

Which means the real skill is not picking a firm. It is knowing which capability is right for which phase, what each partner needs to walk into, and how to sequence the work so each one is set up to succeed.

When it works, a partner delivers something they could not have delivered elsewhere. Not because they got better. Because the conditions got better. The brief was real. The organization had the nerve. The right kind of work was asked for at the right moment.

That is the whole argument of this guide, and it is almost entirely in your hands.

What to do now

You are ready to brief when you can answer four things without hedging.

What problem are we actually solving, and how do we know that is the problem.

What does success look like, in numbers and in a picture.

Who inherits this work, and have they shaped it.

Are we buying capacity, capability, or clarity.

If any of those is soft, that is the next piece of work, and it is cheaper to do now than to discover later.

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