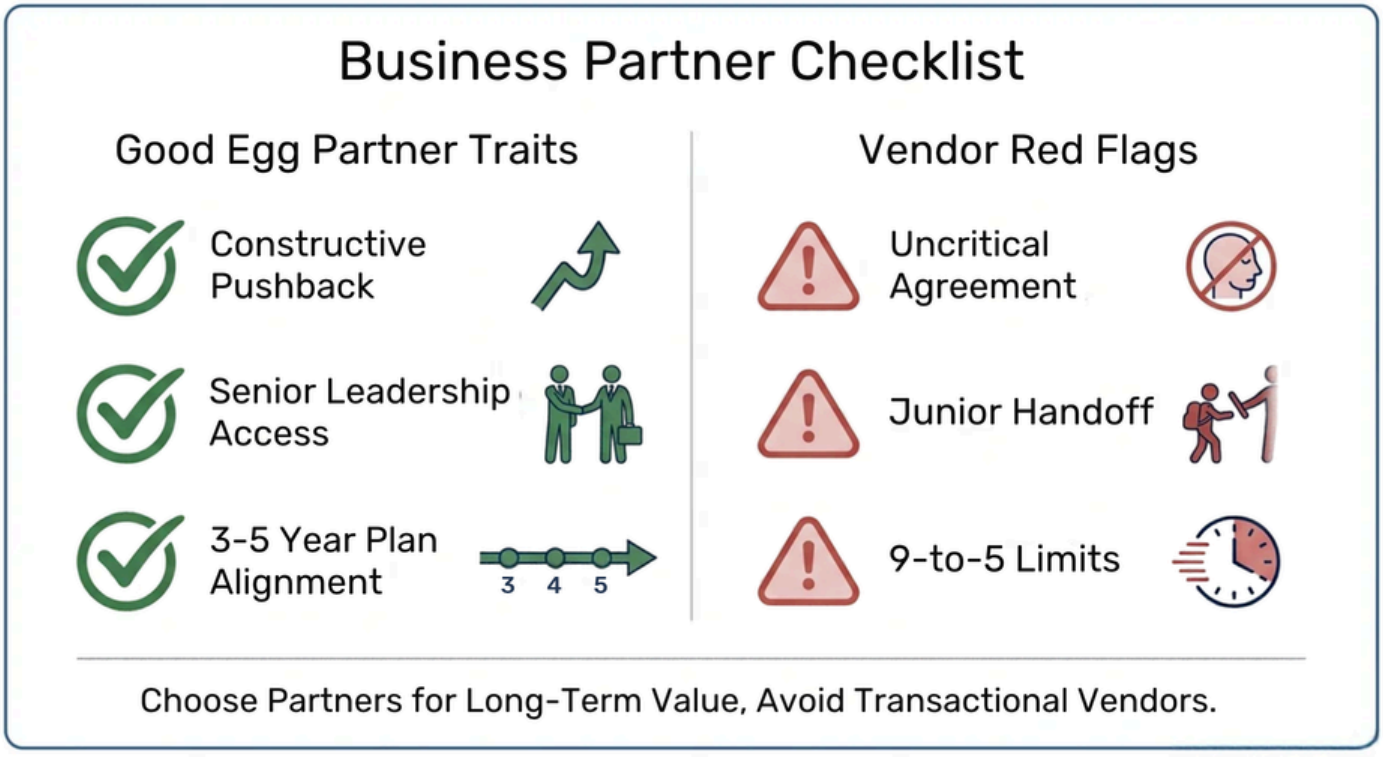
Boston BizTech
Business Technology Solutions

"Your Technology Should Be An Asset: Not A Ransom Note."

The IT Partner "Good Egg" White Paper



10 things every CEO should verify before hiring an IT consultant.
Plus, the red flags that mean you should keep looking

Introduction

Most IT projects that fail do not fail because the technology was wrong; they fail because the wrong firm was hired. This is rarely malicious, as most IT vendors are competent at what they are hired to do, but the problem is that their focus is often far narrower than what the business actually needs.

The CEO who needs a strategic technology partner hires a managed service provider (MSP). The business owner who needs enterprise architecture gets a generalist who configures what they're told to configure. The executive who needs someone to tell them the hard truth gets a team that bills for the hours and says nothing uncomfortable.

This whitepaper gives CEOs and business owners a practical framework for evaluating IT consulting partners, shifting the focus away from credentials and case studies presented in the sales process to the observable behaviors that separate true strategic partners from standard vendors.

KEY STATISTIC

According to Forbes, 70% of technology implementation projects fail. The most common causes are not technical: they stem from a misalignment between the deployed software and the business objectives it must serve, combined with insufficient depth in the team responsible for the execution.

Why This Is Harder Than It Looks

The challenge in evaluating IT partners is that the signals that matter most are invisible during the sales process. Websites, case studies, and reference calls are curated. The behaviors that distinguish a genuinely good partner from one that will collect fees while the project drifts (such as the willingness to push back, the discipline to resist scope creep, and the depth to actually evaluate the work rather than just manage a team) only become visible over time.

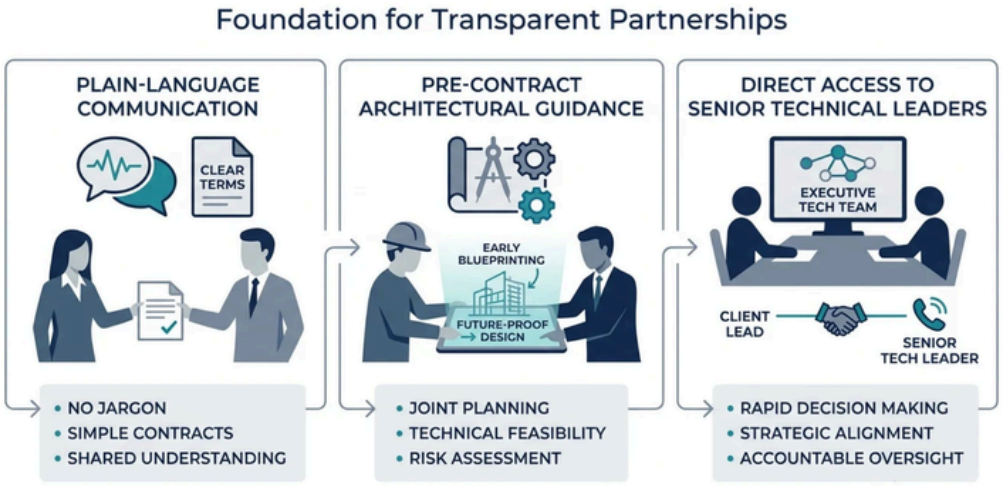
BOSTON BIZTECH CASE STUDY

A parts distribution company hired a development firm to build their e-commerce platform, paying them $100,000 per year for eight years. When Boston BizTech was brought in, the first week of investigation revealed that the development team had never built an actual database. Instead, they had built a flat file (essentially a massive spreadsheet) to search more than 60,000 parts. The CEO had no way of knowing this from the sales process, the invoices, or the relationship. He needed someone with the technical depth to look at the actual work and evaluate it honestly. Eight years and $800,000 later, he found one.

The checklist that follows is drawn from Brian Weekes' signature talk and it's accompanying lead magnet, a practical litmus test built from more than 30 years of IT experience on both sides of the client relationship. It is organized around the talk's three core principles, each delivering specific, observable criteria you can apply directly to your evaluation process.

Principle 1: Your Technology Should Serve YOU — Not the Other Way Around

The most important quality to look for in an IT partner is simple to describe and remarkably hard to find: they have your best interest at heart from the very beginning of the relationship, not just after you've signed a contract.



Checklist Item 1: Do they give useful advice before you've committed?

A firm with genuine expertise will share substantive, actionable insights in the initial conversation, long before any formal agreement is in place, and without withholding value to preserve commercial leverage. They provide information that is genuinely useful to your business regardless of whether you ultimately hire them.

In the first conversation, did they ask enough questions to understand your situation, or did they move quickly to describing their services? Did they offer any insight that changed how you were thinking about your problem? Did you leave the conversation with something useful, or just a proposal?

Checklist Item 2: Will they tell you if they're not the right fit?

A firm that honestly tells you when they are not the right solution, and points you toward a provider who is, demonstrates the exact integrity you want in a long-term technology partner. This level of transparency is nearly impossible to fake in the moment, and straightforward to verify through direct questioning.

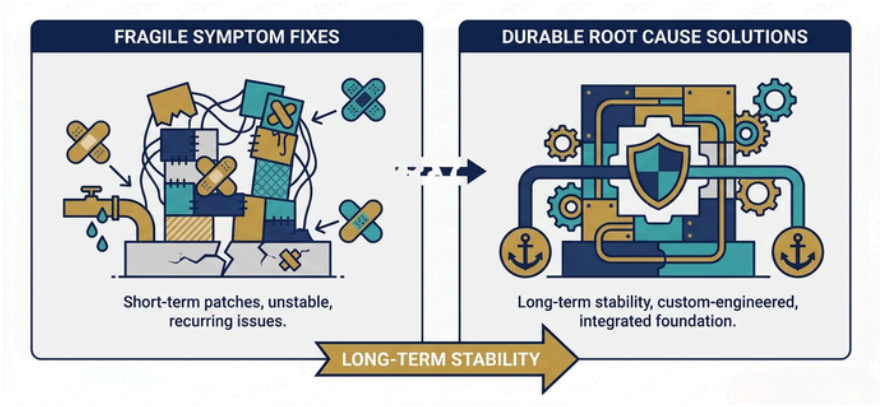
Ask them: tell me about a time you told a prospective client you weren't the right fit. The answer is revealing. If they cannot name a specific situation, that is information.

Checklist Item 3: Do they take your privacy and confidentiality seriously?

How a firm talks about other clients in the sales process tells you how they will talk about you to the next prospect. Be attentive to whether they share identifying details, specific financials, or confidential information about other clients as proof points. A firm that protects client confidentiality does so consistently, not selectively.

Principle 2: Don't Rely on the Band-aid Fix — Go for the House of Bricks

The second principle addresses one of the most expensive patterns in IT consulting: the firm that solves the immediate problem without addressing the underlying cause, leaving the client to return with an identical (and often more costly) version of the problem twelve months later.



Checklist Item 4: Are their solutions custom-tailored or off-the-shelf?

Generic solutions force your business to adapt to the tool. Conversely, the right technology partner designs a solution tailored to your business operations, workflows, and specific pain points, rather than forcing you into using a product they have implemented before and want to implement again. Ask them directly: how does the solution you're proposing account for [specific aspect of your operations]? If the answer is vague, the solution is likely off-the-shelf.

Checklist Item 5: Do they conduct proper due diligence before proposing a solution?

A doctor who prescribes treatment without conducting a proper diagnosis is dangerous. An IT consultant who proposes a solution before thoroughly understanding your business, your technology environment, and the root cause of the problem is making the same error.

Proper due diligence means: detailed technical reviews of your current environment, a clear understanding of how your technology integrates with your business processes, and the ability to make holistic, accurate risk assessments rather than addressing only the symptom that was presented.

How long is their discovery process? What does it involve? Do they want to speak to people beyond the IT department? Do they look at your business plan? If discovery is a 30-minute intake call followed by a proposal, that is not due diligence.

Checklist Item 6: Can they demonstrate proven results in environments like yours?

Not case studies on a website. Specific examples, described in enough detail to be verifiable, of problems comparable to yours being solved with measurable outcomes. Ask them to walk you through the discovery process, the challenges encountered, and the specific results achieved. The depth of the answer tells you whether the case study is owned experience or borrowed credibility.

Principle 3: Start with the Big Picture on the Lid — Don't Be That Amateur Kid

The third principle addresses the most common gap between good IT firms and great ones: the ability, and the discipline, to start every engagement with a comprehensive view of the business rather than focusing solely on the immediate technical problem in front of them.

The analogy from Brian's talk: imagine trying to complete a 10,000-piece jigsaw puzzle without the picture on the lid of the box. You might connect a few pieces, but you have no way of knowing how they fit into the whole. IT firms that address the problem they're handed without understanding the full context are building without blueprints. They are solving the piece in front of them without the lid.



Checklist Item 7: Do they start with your business plan?

The right technology partner wants to understand your 3-5 year business plan before proposing any solution. Technology decisions made without a clear roadmap of where the business is heading are frequently obsolete within two years. The firm that asks about your growth plans, market objectives, and operational ambitions before discussing technology is the firm that will build something that actually serves your future, rather than just your present.

Checklist Item 8: Do they think long-term, not just for today?

Ask directly: how do you ensure that the solutions you build today don't need to be rebuilt in three years? The answer will tell you whether they are building for your business's trajectory or for the immediate specification. Firms that think long-term will ask about your growth plans, your anticipated scale, and the business capabilities you'll need as you grow.

Checklist Item 9: Do they resist jumping to conclusions?

Good IT consultants ask more questions than they answer in an initial meeting. Rather than relying on assumptions, they refuse to propose solutions before completing a thorough discovery phase. They understand that a problem as initially described is rarely the only issue, and that the root cause may not be what it first appears to be.

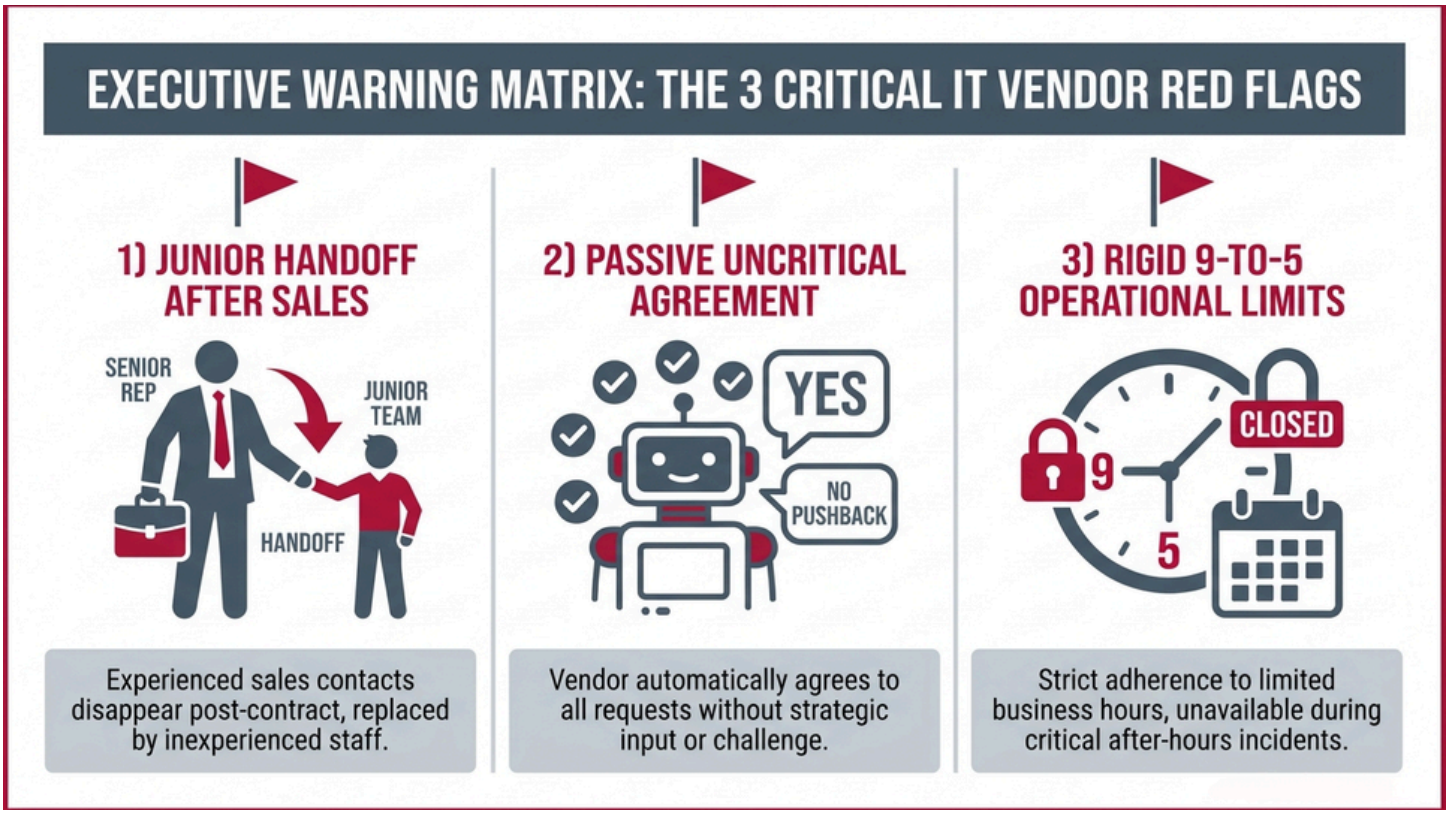
How many questions did they ask about your business in the first meeting? Did they propose a solution immediately, or did they describe a discovery process first? Did they acknowledge uncertainty, or did they project confidence about a problem they have not yet investigated?

Checklist Item 10: Can they communicate without jargon?

The last item on the list is, arguably, the most important. The ability to explain complex technology decisions in plain business language is rare, yet essential for a CEO who must make informed decisions about technology without relying on technical translation.

Do they actively listen and ask insightful follow-up questions? When you have questions, do they patiently explain the answers? Ultimately, do they treat you as a valued decision-maker or merely an obstacle to their technical work? The quality of that communication in the sales process provides the best available preview of the relationship you will experience once the project is underway and critical decisions must be made under pressure.

Download the Good Egg Checklist at bostonbiztech.com/top10



The Red Flags That Should End the Conversation

Beyond the checklist, there are specific behaviors in the evaluation process that should give any CEO significant pause.

They respond only to what they're asked

A technology partner who solves only the problem they're contracted to handle, while staying silent when they spot concerning issues outside their scope, is a vendor rather than a partner. To evaluate this, ask yourself: during the initial sales process, have they highlighted anything that suggests they are analyzing your business more broadly than the initial brief?

They agree with everything you say

A firm that never pushes back, never challenges an approach, and never suggests that your current thinking might be missing something is not exercising the judgment you are paying for. You do not need a firm that tells you what you want to hear. You need one that tells you what you need to hear.

The senior person sells but a junior team delivers

Ask directly: who will be doing the actual work? Will the person in this conversation be involved in the engagement, or will they hand off to a team? The standard agency model (where the senior person closes the deal and a junior team delivers) is the most common cause of the gap between what was sold and what was received.

Boston BizTech's principals, Brian and Colton, are the exact experts who execute your project. Brian brings over 30 years of enterprise IT experience, including a decade serving as a Fractional CIO. Colton delivers 18 years of specialized expertise, highlighted by 7 years as a University CIO. When you engage Boston BizTech, you get the veterans whose names are on the door, not a junior team assembled after the contract is signed.



Questions to Ask in the First Meeting

- Walk me through a time you told a client something they didn't want to hear. What happened?
- Tell me about a prospective client you told you weren't the right fit. Why, and what did you recommend instead?
- What's the first thing you'd want to understand about our business before recommending anything?
- How do you handle discovering a problem outside the scope of what you were hired to do?
- Who will actually be doing the work on our engagement, and will they be in this meeting?

> These questions are not designed to trip anyone up. They are designed to surface the behaviors that separate true strategic partners from standard vendors. A firm that passes this checklist has earned the right to a deeper evaluation. Conversely, a firm that struggles with these questions has already told you everything you need to know.

Conclusion

The right IT partner is not the one with the most impressive website, the largest team, or the longest client list. It is the one that tells you the truth about your situation, builds technology around your business rather than a product they want to sell, and is still accountable for the outcomes long after the project is completed.

Boston BizTech publishes this checklist because we are confident we pass it. Our policy is to step aside if we are not the right fit, and we strictly refuse to propose solutions before completing a thorough discovery phase. We pride ourselves on uncovering the hidden vulnerabilities you did not ask us to find, and, the experts present in your very first conversation will be the exact people executing the work.

