Twelve questions to ask before *you sign*

They are not gotchas. They narrow the field in one meeting.

TIME NEEDED
One meeting, this page in hand

YOU LEAVE WITH
A scored firm, not an impression

FROM
bosio.digital AI consulting

BEFORE YOU START

Any firm worth hiring will welcome these.

These are the questions a buyer asks after an expensive mistake, or because they were thoughtful enough to avoid one.

They are not traps. A firm that has done this work at your size will have answers ready and will be glad you asked, because the answers are what separates them from the firm that will not. The field narrows quickly, which is the point.

How to listen, which matters more than what you ask

Count the sentences, not the content

On the success question, count how many sentences go to technical metrics and how many go to adoption and behavior. The ratio tells you more than anything either of you says.

Ask the follow-up once, then stop

When an answer stays general, ask for a concrete example from a recent engagement at your size. Then say nothing. What happens to the specificity of the second answer is the real data.

Two questions cannot be answered from sales mode

Question 3 and question 12. A firm in pure sales mode will reframe both. Watch for the reframe rather than the answer.

WHAT THIS DOES NOT COVER

The arithmetic of what an engagement costs across year one is a separate document, the AI Budget Worksheet. This one is about the firm. That one is about your budget.

QUESTIONS 1 TO 3

Who is actually doing the work.

1 **Who specifically will do the work once we sign, and can I meet them before we sign?**

At large firms, partners sell and analysts deliver, with one senior person across four to seven active engagements. The right answer names the person running discovery, the person leading implementation, and offers an introduction before the contract.

Red flag: "senior oversight" and "partner involvement at key milestones" are not senior delivery

2 **Can you connect me with a mid-market company you worked with in the last 18 months?**

Not an enterprise logo. Under 500 people, roughly your industry, a similar implementation, inside 18 months. The tools and the organizational problems from three years ago do not transfer.

Red flag: reasons why references are difficult to share

3 **What would you specifically not recommend for us right now?**

The intellectual honesty test. A firm thinking about your outcome will name an option they would advise against and say why, specific to your situation. A firm thinking about its revenue will find a way to make every option viable.

Red flag: "it really depends on your needs", or a pivot back to capabilities

QUESTIONS 4 TO 6

What the work actually is.

4 **What do the first four weeks look like? Show me the deliverable list, with a date on each.**

Discovery is the phase most likely to run indefinitely without a deliverable gate. A prioritized roadmap, a risk register, named champions and the first pilot scoped is a different four weeks from a presentation.

Red flag: "deliverables depend on what we find in discovery"

5 **How do you measure success, across all three dimensions?**

Technical performance, business impact, and user adoption. Most firms speak fluently to the first, many to the second with prompting, few have a method for the third, which is where mid-market implementations actually fall short.

Red flag: one dimension described well means two failure modes are invisible to them

6 **What is your specific methodology for the human side?**

Anthropic's study of 81,000 people found the top employee concerns are unreliability at 26.7%, job displacement at 22.3%, loss of autonomy at 21.9%, and cognitive atrophy at 16.3%. Not one is a technical problem. At 200 people you cannot absorb 20% resistance the way an enterprise can.

Red flag: "we take a people-first approach", with no process behind it

QUESTIONS 7 TO 9

When it gets hard.

7 How do you handle it when our data is not ready?

Data unreadiness is the standard condition, not the exception. Gartner found 63% of organizations do not have, or are unsure they have, the right data practices for AI. A Cloudera and Harvard Business Review study in March 2026 put the share of enterprises whose data is completely ready at 7%.

Red flag: "we work through data issues as they arise" means your budget absorbs their learning

8 Describe your handoff. After the engagement ends, what are you still accountable for?

Many engagements are scoped as strategy and pilot: the firm validates a concept, produces a roadmap, and leaves. Your team, which does not yet have the skills or context to execute it, owns the next phase. "Nothing, we are complete at handoff" is an honest answer, and it is significant information.

Red flag: no answer at all, which means it has not come up before

9 Is the scope locked in writing before the fee?

The fee is a function of the scope. A firm that sets the fee first preserves its optionality at your expense: the scope drifts to fit the number, and the work that mattered gets squeezed out at the end.

Red flag: a fee quoted before anyone has written down what is being bought

QUESTIONS 10 TO 12

Money, and what you actually own.

10 What is not in this price?

The consulting fee is the most visible cost and almost never the largest. Platform and licence spend, your own people's hours, and the adoption work all arrive whether or not they were in the scope. Ask for them to be named, not estimated.

Red flag: an answer that treats the fee as the budget

11 What do we pay every year after you leave?

The run rate is the number that decides whether this was a project or an operating change. It is also the number least likely to appear in a proposal. If nobody in the room can answer it, that is the finding.

Red flag: the run rate has not been calculated, only the engagement

12 What do we own when this ends, deliverable by deliverable?

List it: documented architecture, working systems running on your own accounts, trained internal owners, decision criteria your team can apply, a written off-ramp. If the answer is a set of files your team can read, edit and operate without them, that is architecture work. If it is a dependency, you have bought a subscription to your own knowledge.

Red flag: the most expensive engagement is the one that ends with a deck and a relationship

AFTER THE MEETING

Score it while it is still fresh.

Fill this in within an hour of the call, before the impression of the room replaces what was actually said. Two firms rarely feel different. They usually score differently.

QUESTION	SPECIFIC ANSWER	GENERAL ANSWER	REFRAMED THE QUESTION
1. Who does the work, can I meet them			
2. Mid-market reference, last 18 months			
3. What they would not recommend			
4. First four weeks, dated deliverables			
5. Success across three dimensions			
6. Method for the human side			
7. When the data is not ready			
8. Handoff, and what they still own			
9. Scope locked before the fee			
10. What is not in the price			
11. The annual run rate after they leave			
12. What we own, deliverable by deliverable			

READING IT

Specific answers on 3 and 12 matter more than the other ten combined, because those are the two a firm in sales mode cannot produce. A firm with two or more in the third column is telling you how the engagement will go.

WHAT TO DO NEXT

Ask three, not twelve, if that is all you get.

If the meeting is short

Questions 1, 3 and 12. Who is doing the work, what they would advise against, and what you own at the end. Those three separate the field faster than the other nine.

If you are comparing two firms

Use the same twelve on both, in the same order, and fill the grid within the hour. Comparing impressions a week later is how the better presenter wins.

If you are already mid-engagement

Questions 8, 11 and 12 still work, and they go differently while there is still budget left.

THE TEST WE HOLD OURSELVES TO

Apply question 12 to us as well. VISUAL FACILITATORS, a Hamburg firm working worldwide, runs the system we built on its own European storage, maintains and extends it without us, and cut proposal drafting from 90 minutes to 30. If an engagement does not end with your team operating the thing without the firm that built it, it was not ownership work.

Other guides in this set: the AI Budget Worksheet, the arithmetic of year one. Where to Put Your First AI Agent. The Context Files.

IF YOU WANT A READ ON THE ANSWERS YOU GOT

Send us the notes, or take 30 minutes. If we are not the right fit, we will say so and point you somewhere better.

bosio.digital/contact

Sources: Anthropic's study of 81,000 people on employee AI concerns. Gartner on AI data readiness and project abandonment. Cloudera with Harvard Business Review, March 2026. Budgeting rules from the published bosio.digital cost guide. Client figures as published at bosio.digital/clients.