

Successful Outsourcing

A Guide to When, Why, and How to Hire
a Content Development Agency

by Val Swisher



Successful Outsourcing

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You've been asked to do the impossible.

Perhaps it's releasing a new content deliverable to your customer base in a very short time. Maybe it's creating specialized content that exceeds your team's knowledge.

At one time or another, every manager I know has been tasked with producing miracle content. Sometimes, other priorities must take a back seat or even get canceled. Often, we just need to find a way to get the job done.

This eBook was created to help you decide:

- When to use an outsourced resource
- Why you should use an agency, rather than hire an individual
- How to find a superior agency

I've also included two checklists to help you in the process:

- Information to think about before you call an agency
- Questions to ask when discussing a project with an agency

I've learned a lot about working with outsourced resources over the 25+ years I've owned a company dedicated to providing them. I'm sharing this information with you, so that you can be confident when you decide to outsource.

Outsourced resources go by many titles:

Consultant

Freelancer

Contractor



It doesn't matter what you call them. For simplicity, in this eBook I use the term **contractor** to mean an outsourced resource.

When to Use a Contractor

There are several situations that readily lend themselves to finding outside help for your content creation project. Here are a few.

Too Much Work, Not Enough Staff

By far, the reason most customers engage a contractor is that they have too much work and not enough staff to do it. Here are just a few examples of common circumstances:

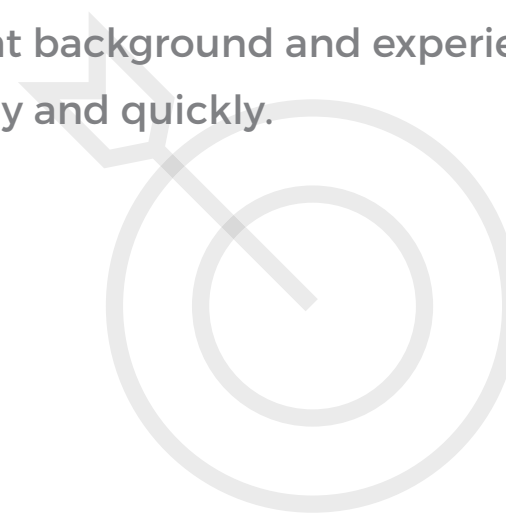
- ✓ An employee unexpectedly leaves the company in the middle of a project
- ✓ Management requests a new deliverable that isn't in your plan
- ✓ The actual workload exceeds your plan for any number of reasons
- ✓ Unexpected change requests have slowed your throughput

When you are in a position in which you simply don't have enough people to do the work, you need to find a qualified contractor – right away.

Specialized Knowledge

Sometimes, we need more than just another proverbial “pair of hands.” Perhaps your company is releasing a new product or service, and no one on your team has the background needed to do the job. Even if you have enough staff, there often isn't enough time to educate an employee while simultaneously creating content.

When this happens, your best option is to hire a contractor who has deep knowledge of the topic. In an ideal world, you hire someone who has written specifically about the topic in the past. At minimum, you hire someone who has the right background and experience to get the job done correctly and quickly.



When to Use a Contractor

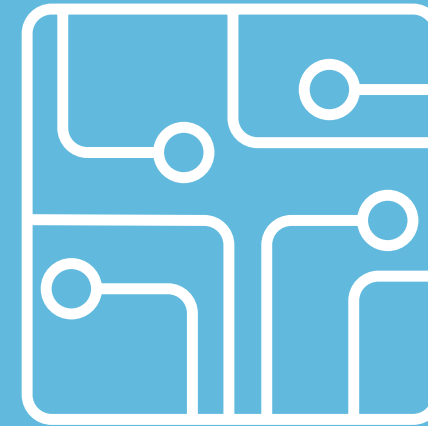
Specialized Skills

Maybe you don't need someone with deep knowledge of a particular subject matter. Maybe you need someone with expertise in a particular toolset, technology, or process.

I've had customers hire our experts to work in legacy tools until the customer has time to migrate the content into the new toolset. It does not make sense for the customer to train staff to use the legacy tool only to have the tool go away.

I've also had customers hire our experts to work in new toolsets while the staff completed a training program and phased adoption of the new system. In those cases, our experts often help train the staff on how to use the system and, more importantly, on the "tips 'n' tricks" of using it most effectively.

Case Study



I was working with a customer in the technology arena. They were about to release a new piece of hardware. This hardware was revolutionary and was sure to change computing as we knew it up to that point.

The technical documentation department was well staffed. There were about a dozen writers, each very busy working on two or more projects.

The customer could not afford the time it would take to pull an employee off their projects, backfill those projects with someone else (perhaps a contractor), and train the employee before the hardware would be released.

Instead, the customer hired us to build a team of experienced contractors (writers, editor, illustrator) to create the initial content for the product release. Once the product and associated documentation was released, and the immediate pressure was off, the contractors helped train the employees on the new product and technology. The staff took over future work on the documentation suite.

When the employees took over the new product content, the contracted team stayed on to maintain the legacy content through its end of life.

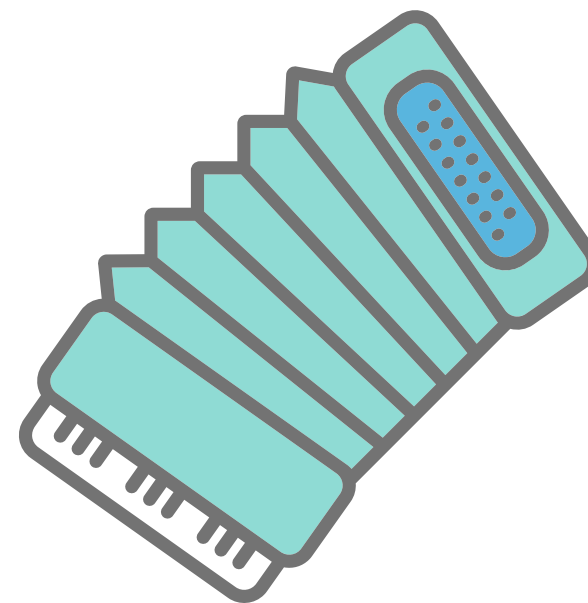
When to Use a Contractor

Here are some examples of the specialized skills we've provided to our customers in recent years:

- Structured authoring
- DITA XML
- Taxonomy and metadata
- Specific content management or authoring tools
- Content optimization
- Style guide creation or harmonization
- Template creation
- Content transformation
- Global English editing
- eLearning course development
- API documentation
- UX flows and navigation development
- UI string writing for Internet of Things devices

Need Is Short Term

One of the main benefits of working with contractors is that you only pay them when you need them. This makes working with contractors quite cost-effective, when compared to hiring full-time, fully burdened employees. You only pay for the time contractors work. Once the work is over, you're done paying.



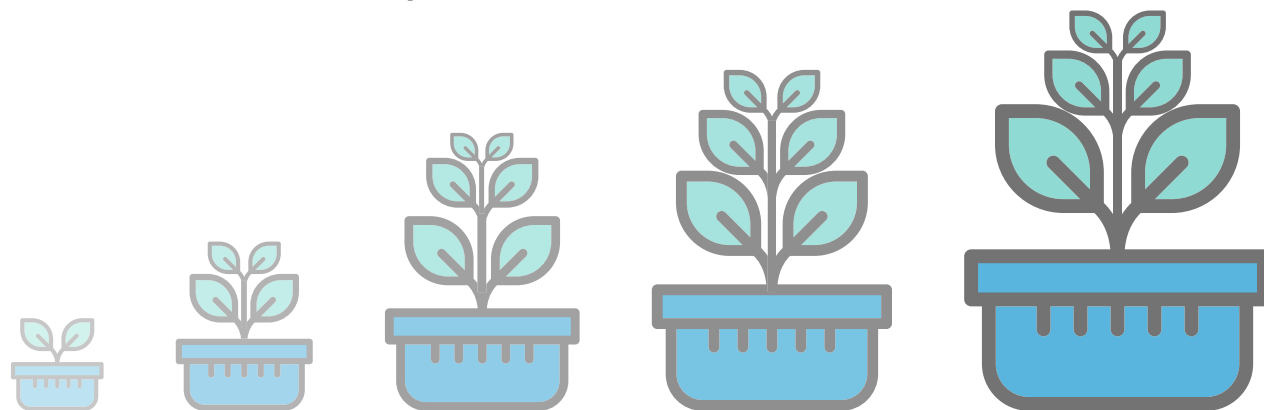
Think of contractors like an accordion. Your workforce expands when you need help and then it shrinks when you don't. The process for bringing on and letting go contractors is significantly easier and much less costly than for an employee. And it's expected – no guilt when the end of a project comes and the contractor needs to move on. While you're sure to miss the person, you are not responsible for finding them additional things to do.

When to Use a Contractor

(Almost) Infinite Scalability

Imagine an accordion that is so flexible that it just keeps expanding. In a lot of ways, a team of contractors is the same. It is much easier to scale-up using contractors, particularly when those contractors bring background knowledge and experience to the project.

Need a project done more quickly? Hire more contractors. Split the workload among them and get things done two or three times more quickly. Of course, not every project lends itself to a team, but you might be surprised how often a team approach works well and is super-efficient.



Case Study

A training group had dozens of instructional designers creating courses. The courses were created, reviewed, and released on a strict schedule. Sometimes, several courses needed to be edited all at once. Other times, there was a gap of a week or even month when there was no need for editing.



The customer considered hiring a staff editor. But they quickly realized that the person would either be completely overwhelmed with work or have nothing to do. There was no way to normalize the workload so that it was a steady stream.

Instead, the customer hired a contract team of four editors and a project manager. Whenever content needed to be edited, the instructional designer would contact the project manager. It was the project manager's job to disseminate the content to one or more of the team's editors. Because of this team approach, there was always an editor available to take on the work. And when the lulls between the bursts happened, the customer didn't have to pay for any editing at all.

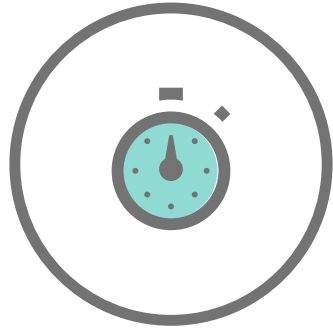
This flexibility proved to be the most cost-effective and efficient way to get all the editing done for the entire program.



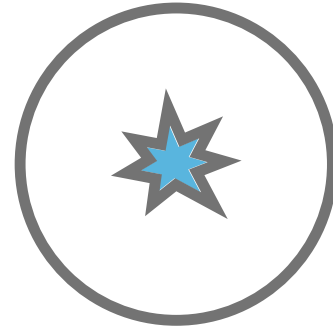
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Should You Engage an Individual or a Company?

As tempting as it is to engage an individual contractor when you have a need, there are many benefits from working through an agency instead. These include:



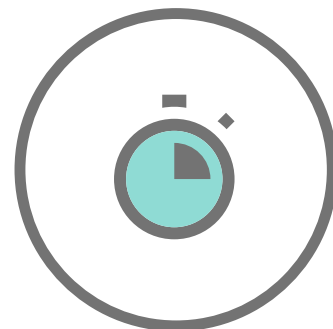
Speed and ease of sourcing



Mitigating risk



Scalability



**Meeting all your needs
over time**

Speed and Ease of Sourcing

Have you ever posted a job opening on a job board such as Indeed, Glassdoor, or Craig's List? If so, you've probably been inundated with résumés from people who simply aren't qualified to do the work. Often, people ignore the list of qualifications and experience you are looking for.

When you receive 200 (or 2,000) responses to an ad you've posted on a job board, sorting through those résumés is an arduous task. It is possible that you completely overlook the golden needle in the big haystack. Going it alone, directly to the contractor, is a time-consuming and frustrating task. All the while, you still have a full-time job that you are supposed to be doing.



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Should You Engage an Individual or a Company?

Pre-screening contractors

One of the main tasks of a qualified agency is to prescreen all candidates before a résumé ever crosses your desk. An agency should do the following before they send you a candidate:

- Interview the contractor
- Check samples
- Check references
- Do a background check



This is what you pay the agency to do.

The `A` list

If you work with an agency who has been in business for many years, it is likely that they have a pool of resources with whom they have worked repeatedly. Perhaps they have an “A” list – a group of people who they know will do an excellent job for you

because they have done so for other customers year after year. If you have found an agency with this type of resource pool, you’ve hit the jackpot. You can and should expect an awesome resource who has completed many projects for the agency over time. Imagine the time and money you save going through a well-established agency and working with one of the people on their A list.

Replacing a contractor

If you engage a contractor directly, and that person is not doing a good job for you, you must start over to find a replacement. This can be a tremendous waste of time, energy, money, and emotion. If you are unhappy with someone you have engaged through a vendor, it is the vendor’s responsibility to very quickly find a suitable replacement. It’s also the agency’s responsibility to tell the contractor that they are being released from the project. You get to leave the dirty work to them!

Case Study



Several years ago, I was working with a fabulous contract writer. He and I had been working together for many years. We knew each other well. One day, he called me and said that he needed to leave a project because one of his children was ill. He said he'd be gone for about six weeks and felt that he should resign from the project.

I urged him to stay on in a more consultative role instead of resigning. I found a second writer who could work under his tutelage. He reviewed everything the second writer wrote and made sure it was up to the client's very high standards.

In the end, the customer was delighted. We now had two available resources, the original writer and the second writer. Both were excellent. The project went on to be a great success.

Should You Engage an Individual or a Company?

Even the best contractors need to leave a project from time to time. Family emergencies happen. Illnesses happen. Again, it is the agency's responsibility to give you as much notice as possible and hopefully find a replacement before the contractor must go.

Mitigating risk

You incur a number of legal risks when you work directly with a contractor, rather than engaging them through an agency. These include:



Insurance



Level of separation



Common law rules

Should You Engage an Individual or a Company?



Insurance

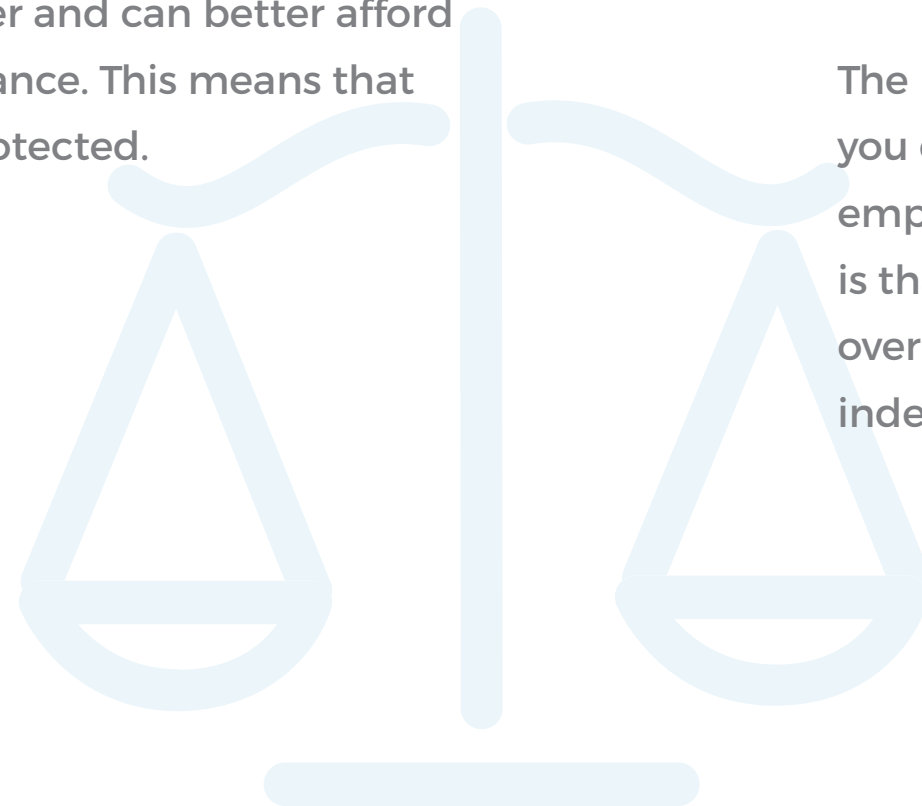
Most large companies have very high requirements for insurance coverage that the contractor needs to purchase. An example is Errors and Omissions insurance. Some companies require 3, 5, or even 7 million dollars of insurance. This insurance can be cost prohibitive for an individual and very few individuals carry such policies. An agency is larger and can better afford to carry prerequisite insurance. This means that your company is better protected.



Level of separation

When you engage an agency, your company is not paying the contractor directly. This provides a level of separation, should the contractor ever try to sue your company for employee benefits. Of course, this is only one of many things that the IRS looks at when determining if your contractor is really an employee in disguise.

The IRS.gov website contains information to help you determine if someone is a contractor or an employee. One core issue that the IRS examines is that of control. Does the customer have control over the working environment or is the contractor independent?



Should You Engage an Individual or a Company?



Common law rules

According to the IRS, facts that provide evidence of the degree of control and independence fall into three categories:

- 1. Behavioral:** Does the company control or have the right to control what the worker does and how the worker does his or her job?
- 2. Financial:** Are the business aspects of the worker's job controlled by the payer? Relevant control includes things like:
 - How the worker is paid
 - Whether expenses are reimbursed
 - Who provides tools/supplies
- 3. Type of Relationship:** Are there written contracts or employee type benefits? Employee type benefits are perks such as:
 - Pension plan
 - Insurance

- Vacation pay
- Expectation of ongoing employment
- The work performed is a key aspect of the business

State laws

In addition to the IRS rules, states can have additional criteria for the determination of whether a worker is a contractor or an employee. Some states use the Common Law test provided by the IRS. Other states use the ABC Test.

Under the ABC test, a worker is considered an employee and not an independent contractor, unless the hiring entity satisfies **all three** of the following conditions:

- The worker is free from the control and direction of the hiring entity in connection with the performance of the work, both under the contract for the performance of the work and in fact;



Should You Engage an Individual or a Company?

- The worker performs work that is outside the usual course of the hiring entity's business; **and**
- The worker is customarily engaged in an independently established trade, occupation, or business of the same nature as that involved in the work performed.

In 2018, the California Supreme Court wrote a particularly strict interpretation of this test, which was signed into law by the state governor in 2019. The resulting law included a number of exceptions, caveats, and “determined on an individual basis” grey areas. An agency keeps up on these sorts of changes to the law.

California is not the only state that uses the ABC Test. So do Colorado, Louisiana, New York, and about 20 others.

Any ambiguity about whether the individual is a contractor or an employee can become very costly very quickly. At a minimum, your company may be liable

for employment taxes, including Social Security and Medicare contributions, for every misclassified worker. There may be lawsuits and penalties involved.

It's much safer for everyone – including the contractors - when you hire contractors through a reputable agency.



Should You Engage an Individual or a Company?

Scalability

When you work with an individual contractor, that person can perform the services they do best. For example, a senior technical writer can write great technical documentation. Sometimes, you have needs that are not in the core skillset of the individual you have engaged.

When you work with an agency, you can get the best resource for any given task. Rather than asking a senior technical writer to draw illustrations, your agency can find you a top-notch technical illustrator. Rather than asking your top-notch illustrator to do editing, your agency can source a professional editor for you.

As your needs change, an agency can supply you with the best resource, at the right price point, for whatever task is on your priority list.

Case Study

One of our contract senior technical writers was creating documentation for a technology company. During the course of the project, the company realized they needed someone to do layout of their content. Their first instinct was to ask the technical writer if she could do the layout. Because they were working with an agency, they called us first.



When the customer called us, we told them that while the writer was capable of doing layout, we had other resources who specialize only in layout. And that those resources were less expensive than a senior technical writer.

In this way, we were able to provide a contractor whose focus was on layout and the customer was able to save money, too.

Should You Engage an Individual or a Company?

Meeting All Your Needs Over Time

The job of an agency is to find the perfect match for your project. By “perfect match,” I mean someone who has the background, experience, and temperament to work in your environment.

A good agency strives to cultivate a long-term relationship with you. The agency wants to be your “go to” place for all of your needs, all of the time. Your relationship with an agency should go beyond a single resource or a single project. In this way, your agency becomes an extension of your department, and is able to provide the best professionals at the best price point, each and every time.

I once had a customer describe my company as follows:



“Content Rules is like a kitchen cupboard. When I open the doors, I always find what I need. And the cupboard never runs out.”

This is the type of relationship you want to have with your agency.

How to Find a Superior Agency

A superior agency is a partner that is:



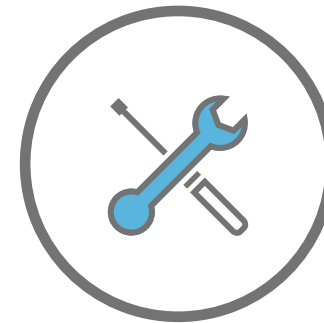
Trustworthy



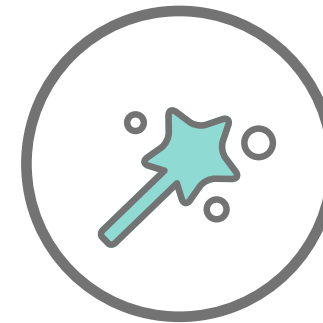
Reliable



Dependable

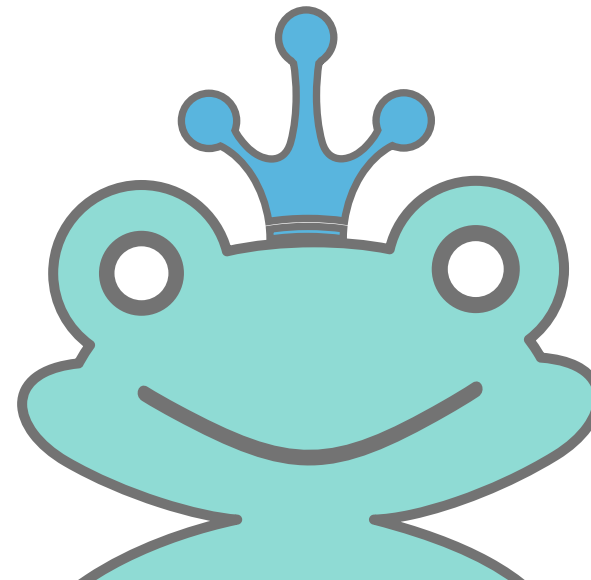


**Easy to
work with**



**Adaptable to
your needs**

Like finding anything superior, locating this type of agency can be time-consuming. Sometimes, you have to kiss a lot of agency frogs before you find your agency prince (or princess). Here are some things to look for when you search for the royalty of agency partners.

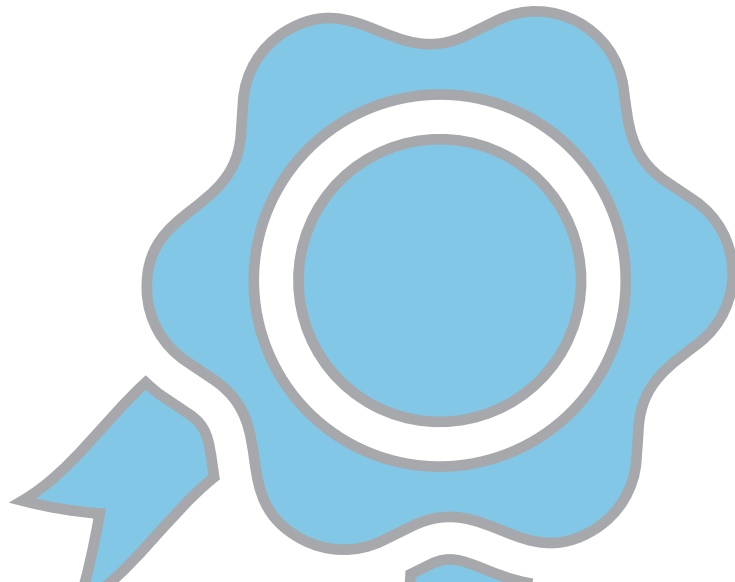


How to Find a Superior Agency

Reputation

The first place to look for a great agency is your network. Who do you know that owns an agency? No one? That's okay. Who do you know that has worked with an agency? Perhaps another group in your company has had great success with a particular vendor. Or perhaps you belong to a group of colleagues in your industry who you can go to for help.

The best way to find an awesome agency is to engage a company that is considered awesome by the people you most trust and respect. That way, the awesome goes around and comes around.



Longevity

Another thing you want to look for in a superior agency is longevity. Has the company withstood the test of time? How many recessions has it survived? Has it been around long enough to have “**been there, done that?**”

I can tell you that the contract agency space is both crowded and empty. What do I mean by that? Years ago, when I started my company, I had many competitors – other small companies who were competing for the same customers. Twenty plus years later, small companies in the contract content development space are harder to find. There are only a handful left.

What happened?

A few things.

How to Find a Superior Agency

First, the very large consulting firms conquered many large customers. These firms don't specialize in great content creators. Some specialize in IT infrastructure and "throw in" things like writing as a side project. Others specialize in other types of consulting. However, the ultra-large consulting firms have ultra-large contracts. They tend to become the vendor of choice because they are big, they are there, and their girth allows them to provide deeply discounted pricing.

Second, many of the smaller content creation agencies did not survive the great recession back in the 2000s.

As corporations tightened their budget belts, lots of smaller companies could not stay in business. I know former agency owners who became real estate agents.

Third, as more large companies send more work offshore, there are fewer opportunities for US-based contractors.

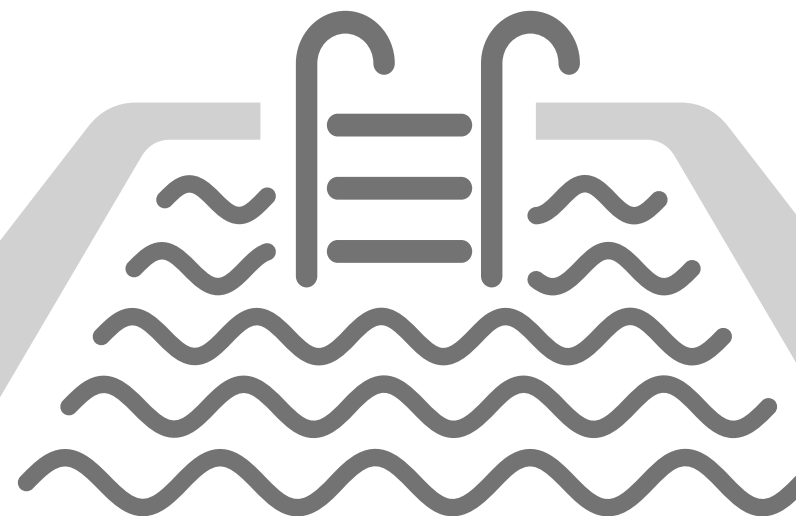
Fewer jobs to fill means fewer small businesses to fill them.

The content development agencies who remain are the ones who survived it all. Usually, they survived because of their reputation. Longevity and reputation are soulmates.

Depth of Pool and Experience

A superior agency has a pool of contractors who have a lot of experience. The pool of people is deep and the knowledge that the contractors bring to each project is equally deep.

Look for an agency that has a solid base of people who have the experience you need.



How to Find a Superior Agency

References

Like anyone that you hire, you should get references for your agency. The agency should be able to supply you with several customers for you to speak with. When you speak with the references, be sure to ask questions:

- ✓ Is the agency easy to work with?
- ✓ Do you trust them?
- ✓ How are the contract resources they provide?
- ✓ Did you have any issues with your project? If so, how did the agency make corrections and satisfy your needs?

Keep in mind that not every project goes according to plan. We are working with people, not machines. And people make mistakes. Even experienced people who have the best intentions make mistakes. It's not the mistake that matters. What matters is how the agency handled the issue and fixed the problem. How an agency addresses glitches exposes their core values.

Do You Click?

The final thing to look for in an agency is the click factor. The click factor is about how well you interact on a personal level with the people at the agency. Do they “get you?” Do you feel confident that they understand what you need – perhaps even better than you do? Does the advice they provide resonate with you? Do you feel comfortable with what they say?

Like any good relationship, you need to be able to speak freely with the agency and feel that they are listening to you. Sometimes, you can tell right away. Sometimes, it takes a few interactions. Be patient, but look for the magic. **Clicking with the people at the agency will give you comfort and peace of mind. You'll know that they always have your best interests at heart.**

The Elephants in the Room

There are a few topics that often seem off-limits in the contractor conversation. But they are important topics and need to be addressed:



Full-time onsite



Pricing



It's **not just the
résumé**

Full-time Onsite

There are no words that send a chill up the spine of an agency representative more than these:

Full-time Onsite

Yes, full-time onsite is the death knell phrase to most contractors and agencies.

Why? Why would this be such a bad thing?

Most professional independent contractors remain independent contractors for a reason. They value their independence. They have their own offices, set up the way they like. They have their own computers. They have professional environments that they have created to work in.

The Elephants in the Room

Simply put, if they wanted to work onsite all the time, they'd be employees.

Insisting that an independent contractor must be onsite all the time significantly limits the pool of people you have to choose from.

Contractors find that they are much more efficient working from their own offices. You can trust that the hours they spend on your project are used well. There is no “watercooler” chat. There are far fewer interruptions. They don't need to attend as many meetings.

A good, professional contractor attends in-person meetings when they need to. They make their presence on the team known. They are available when you need them to be. But, they do not want to work at your office all day, every day. People who do that are called employees.

In addition, if you look back at the IRS rules of engagement and the ABC Test, the biggest factor that distinguishes a contractor from an employee is control of the work. The more you control how, when, and where the work gets done, the more risk you insert into the relationship. By not insisting on full-time onsite, you remove what is perhaps the biggest IRS risk.

Pricing

Sometimes, there is an uncomfortable dance between the customer and the agency when it comes to the cost of the contractor. Let's be clear, agencies are in business to make money. They are not non-profits. If you want 100% of your funding to go to the contractor, then you should hire them directly. However, keep in mind the opportunity costs that I've outlined in this eBook.

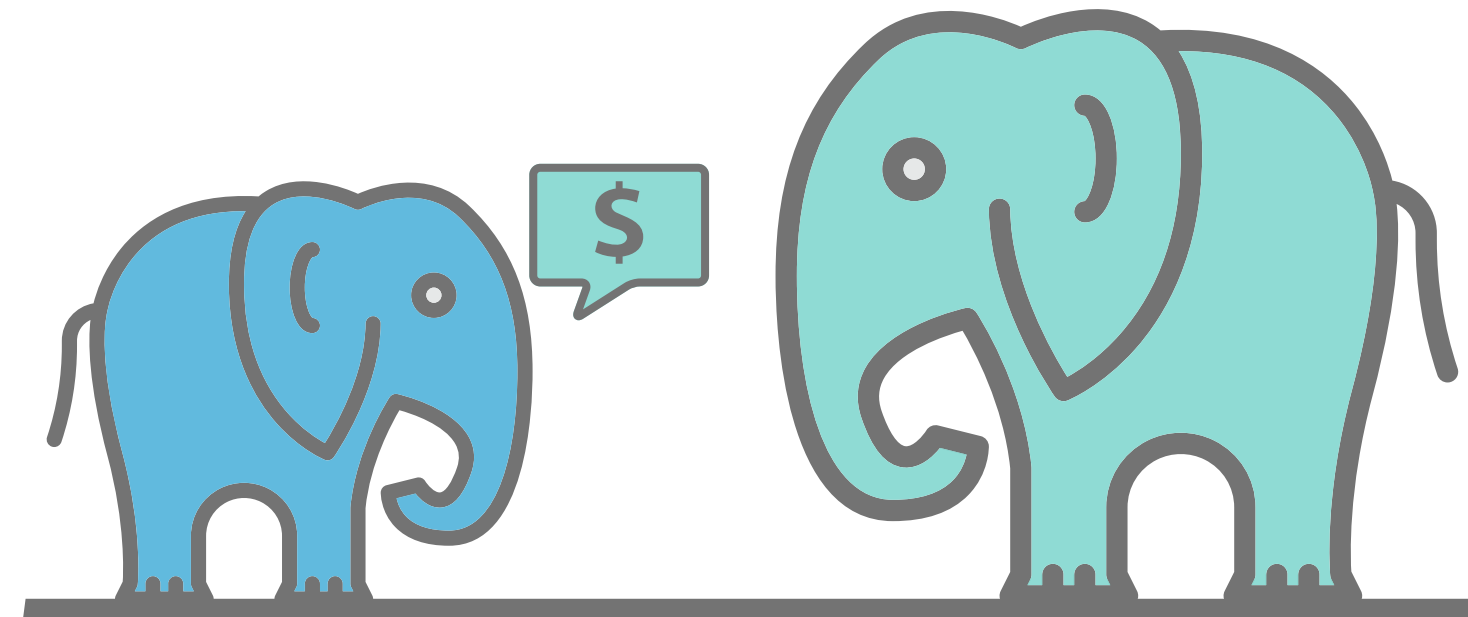
The Elephants in the Room

If you feel the agency is supplying you with quality people, saving you time and money by locating these people on your behalf, stepping in when there is an issue to resolve, guaranteeing the quality of the work performed, and more, then you should have no qualms about paying the fee charged by the agency.

Sometimes customers demand to know the markup they are paying the agency. This is unfair. After all, do your customers have the right to know the markup they pay for your product or service? Not usually. If they decide your product or service is the best choice for them, they pay the price. They don't have the luxury of negotiating your company's margin.

This is not to say that you cannot set your budget. You are the customer. You get to decide how much money you will spend for a contractor. The agency should respond by presenting resources that fit your budget. If the agency cannot find

someone in your budget, then you should find a different agency or modify your budget. You get what you pay for, and this goes for contract resources, too.



Case Study

Recently, we sat down with a large customer. We wanted to know how the project was going, how our resources were doing, and if the customer was happy.

In addition, the customer asked us to locate two additional writers for their team. They have very strict requirements and finding perfect matches for them was challenging.

During the conversation, we came to find out that there was a second agency supplying writers, as well. This is not unusual. But here is what the customer said:

“We have another agency. They have sent us 45 résumés. Out of those 45 resumes, we have hired 2 people. One of whom is not working out. You have sent us 6 résumés. Out of those 6 résumés, we have hired 3 people. They are all terrific.”

We were naturally delighted to hear this. They went on:

“However, our finance group prefers to work with the other agency.”

Surprised, we asked why. And here was the response:

“Because the other agency is cheaper.”

We suggested that perhaps the finance group was not taking all their expenses into consideration, especially the opportunity costs.

The Elephants in the Room

It's Not Just the Résumé

The final topic I'd like to discuss is an important aspect of your relationship with your agency:



If you have selected a superior agency, one that has a great reputation and has been in business for a long time, then it is in your best interest to let them do what they do best. And that is matching the best people to your project needs.

The Elephants in the Room

Your agency should know the contractors they work with extremely well. They should have a long-term working relationship with the people who do the work. Over the course of the relationship, the agency learns things about the contractor that simply cannot be captured in a résumé because these things are intangible, personal characteristics. For example, how well they get along with customers, if they work well under certain management styles (micro-managers or hands-off managers), if they learn new things quickly, and more.

If your agency tells you they have the perfect person for your project, you should feel comfortable trusting them. If you do not, you should switch agencies.

My customers are happiest when I find the perfect person for their project and they engage that person to do the work. It saves them countless hours reviewing résumés and interviewing people. It saves me countless hours looking for less-than-perfect people, when I already have the perfect match. And when my customer is happiest, I'm happiest. That's what it's all about.



Care and Feeding of Contractors

You have budget for your project, you have located a superior agency, and the agency has found you the perfect contractor or team. *Now what?*

The care and feeding of your contractor is an important step to ensure the success of your project. We have a few tips on how to make the most of your time together.

Communication

The key to working with your independent contractor is communication. You can't over communicate with them. The more you communicate about the project and expectations, the better. Ensure that communication happens before, during, and after your project is complete.

At Content Rules, we want our independent contractors involved as early as possible. We include them in the scoping phase. The more information they have about the project scope, the more comfortable they are about the work. The result is a successful project for you!

In my experience, the more feedback I receive from our client about the contractor assigned to a project, the more successful the end-result. If your contractor is not delivering what you expect based on the project scope, that needs to be shared during a project check-in call, or sooner. The earlier a problem is addressed, the better chance of correction. Of course, when the contractor is doing a fabulous job, we want to hear that feedback as well! Your feedback is always shared with the contractor so they can both improve their work product and feel confident in a job well done.

Care and Feeding of Contractors

Team SpiritResearch suggests there is a link between a worker's happiness and their productivity. **Happy employees can be between 12%-20% more productive.** These findings apply not just to your hired staff, but also to your contract staff. Like employees, contractors are more successful and happier when they feel that they are a part of your team.

Your contractor is an extension of your team. They are tackling someone's to-do list and allowing that person to accomplish another task. They are providing value to you and your team. They are more effective when given respect from your team.

That means that your team should be on board with accepting the contractor's role. They need to respond to queries, provide review comments in a timely manner, and do their best to enable the contractor to be successful.

Occasionally, an employee may feel threatened by the contractor's knowledge, skills, or presence on the project. Managers may need to step in to address concerns before a situation escalates and the contractor is unable to deliver. The good news is, in our experience, the team usually welcomes the contractor and values their contributions.

Sometimes, our customers really bring contractors into the fold, even inviting them to after-work happy hours and including them in team activities. Those projects tend to have the best results for the immediate project and for the long term. The relationships develop and the team can bring the contractor back for future projects with full confidence and no ramp-up time.

That said ... contractors are not employees.

Contractors are Not Employees

One of the biggest differences between the employees and contractors on your team is that you are not responsible for the contractor's daily schedule, professional development, or technical savvy. The contractor is there to provide expert services so that project milestones and goals can be achieved.

Employees have a role in the organization in addition to their regular jobs. Most organizations want to develop their employees and retain them for the long term. There are structures in place to help employees learn new skills, tackle workplace challenges, earn pay raises and promotions. Managers and employees set professional development goals for individuals and teams and evaluate performance against those goals.

Case Study

One of our senior contractors was hired for a three-month, half-time project with a clearly defined deliverable. This team did everything right - they communicated, they made the contractor feel part of the team, and they respected the contractor as a skilled professional.



Halfway into the first project, our customer asked us if they could extend the contract and have her work with another team that had a similar need. Near the end of that project, the original team asked if they could extend the contractor again, to work on a different project that required additional skills.

Meanwhile, our contractor told us that she loved working with this customer. She said she would adapt her own schedule and continue to expand her own skillsets as needed to continue working with them.



Care and Feeding of Contractors

Employees also participate in the “business of the business.” They may attend Town Halls, All-Hands, or “Ask an Executive” meetings where proprietary information is shared and roadmaps to the future are presented.

Contractors, on the other hand, are focused on projects. They work toward milestones and they provide deliverables.

That’s one reason the communication is so key – any changes to deliverables, milestones, or standards need to be communicated promptly and clearly in order for the contractor to work most effectively.

Of course, a contractor needs to be trained in the processes and systems unique to your team. But they should not need to be “managed.”

Case Study (Continued)

The original three-month contract has evolved into a long-term relationship. We’ve now worked with more than half a dozen teams at this customer, on a number of short-term and long-term projects. We’ve provided additional contractors who have formed their own relationships with their teams.

(P.S. If you’re one of our customers and you’re wondering if this is you ... it could be. Many of our long-term customers start out with a short project, fall in love with the contractors we provide, and continue calling on us whenever they have a need. It’s one of the reasons we’ve been in business so long and have the reputation we have.)



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Checklists

This section contains two checklists:

- Things to think about before you call an agency
- Questions to ask when discussing a project with an agency



Checklist of Things to Think About Before You Call an Agency

Describe the **project deliverables**.

What **background** should the contractor have?
(Technology, marketing, etc.)

What **tools and technologies** does the contractor need to know?

What is your **management style**? Do you prefer daily updates from the contractor or can they contact you with questions / issues / deliverables?

Describe the **people working on the project**:

- a. Other writers
- b. Editors
- c. Graphic artists
- d. Programmers
- e. Subject-matter experts (SMEs)
- f. Reviewers

Are the **deliverables** brand-new or based on existing content?

What **source material** is available?

Will the **SMEs** be available for consultation?

How long do you expect the project to take?

How much of the project time do you think needs to be spent **onsite at your office**?

Can the resource be **remote**?

Will you be **supplying** a computer? Network access?
A badge?

Do you have a **vendor approval process**?

What are your **payment terms**?

Ideally, when would you like the **project to begin**?

When are your **deliverables due**?

Make sure you know what your top priorities are and the order in which the priorities need to be addressed.



Questions to Ask When Discussing a Project with an Agency

What is the relevant background of the person you have in mind?

What are some successful projects that are similar to mine?

How many years of experience does the person have?

Does this person know the tools that are required for the project?

Does the contractor have their own equipment?

Does the contractor have upcoming vacation plans or other things that would interfere with their ability to complete the project on-time?

Can the contractor be onsite occasionally (if relevant)?

How does the contractor prefer to work? Do they like a lot of management contact or are they self-sufficient?

Does the contractor work well as part of a team (if relevant)?

Can I see samples?

Can I speak directly with the contractor?

What is the cost to engage the contractor?

When is the contractor available?



What We Do

At Content Rules, we combine strategy, optimization, and development to maximize the effectiveness of your content and meet your business needs.

We have more than two decades of experience. We pride ourselves on delivering complete, high-quality content services, on time, and on budget.

Let us help you tackle your next content challenge. Contact us.

info@contentrules.com

	Content Strategy	Global Content Strategy	Content Transformation	Content Development	Content Optimization
We Don't Have Enough Content.	✓		✓	✓	
We Don't Have Enough Time.	✓		✓	✓	✓
We Don't Have Enough People.	✓		✓	✓	
Our English Content is Not Right.	✓		✓		✓
Our English Content is Not Working.		✓	✓	✓	✓
We Spend Too Much Time on Content.	✓		✓		✓
Our Content is Inconsistent.	✓			✓	✓
We Need to Translate, but Don't Know Where to Begin.		✓			
Our Translations Cost Too Much.		✓			✓
Our Translations Aren't Working.		✓			



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