



# How to Choose the Right Consultant

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## I. Why Hire a Consultant

*Do you want to:*

**Increase your Productivity?**

Consultants increase the organization's productivity and efficiency by enabling it to address essential issues to which staff cannot effectively devote adequate time.

**Secure Objective Evaluation and Assessment?**

Outside consultants can recognize and voice matters that internal staff do not recognize or may be reluctant to discuss.

**Obtain Specialized Expertise?**

In highly-developed specialty areas such as marketing, technology, and board development, consultants can provide guidance and complete critical projects.

**Draw on Invaluable Experience?**

Since consultants work with many programs and institutions, they can broaden the range of options to consider, provide a seasoned perspective, and suggest which avenues are most promising to explore.

**Control Your Costs by Selective Investment?**

Cost-effective with a high success rate, consultants provide an attractive alternative to expanding the fixed costs of staffing.

## II. When to Hire a Consultant

*Do you need to:*

**Plan, initiate or execute special projects?**

**Undertake major new initiatives?**

**Evaluate or refresh current programs?**

**Transition from short-term to long-term planning?**

**Initiate strategic assessment and/or strategic planning?**

**Handle staff responsibilities on an interim basis during transitions?**



## **How to Choose the Right Consultant (continued)**

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### **III. Checklist for Choosing the Right Consultant**

- \_\_\_1. Clearly define the project(s) for which you need outside help.
  - ✓ Build Board and staff consensus on need to hire consultant.
  - ✓ Determine internal decision makers and selection process.
  - ✓ Out of many possible outcomes, what, specifically, do you want to achieve?
  
- \_\_\_2. Identify appropriate consultants to help you achieve your goals. Sources include:
  - ✓ *Directories*: ACN, for example, publishes an on-line directory by category.
  - ✓ *Referrals*: both personal and professional sources.
  - ✓ *Advertisements*: trade publications and/or yellow pages.
  - ✓ Determine arena and level of expertise required; confirm budget available.
  
- \_\_\_3. Screen prospect pool to top candidates.
  - ✓ Request basic information from all candidates, then select finalists to interview.
  - ✓ At least two is productive; three is plenty; more than four begins to be counterproductive.
  
- \_\_\_4. Schedule face-to-face meetings with your top prospects.
  - ✓ Allow at least one hour for each—anything less is not in your own best interest.
  - ✓ Provide appropriate organizational information to each prior to your meeting.
  - ✓ List your criteria and key questions, then use consistently for each presentation.
  
- \_\_\_5. Make sure that the consultant's philosophy and mission are compatible with your own.
  - ✓ Agreement on values, vision and personal compatibility are essential.
  
- \_\_\_6. Request proposals from your top candidates.
  - ✓ Ask them to specifically address what services they will provide, their cost and fees, a preliminary timeframe and the expected outcome.
  - ✓ Are there organization-specific questions for which you need an answer as well?
  
- \_\_\_7. Frame cost considerations in terms of net gain.
  - ✓ Experience shows that the lowest bid may not turn out to be the least expensive.
  - ✓ Meeting your net objective is the ultimate goal.
  
- \_\_\_8. Check references provided by consultant finalists.
  - ✓ Ask if former clients would hire the consultant again.
  
- \_\_\_9. Notify all candidates of your final decision in a timely manner.
  
- \_\_\_10. Request a detailed contract specifying:
  - ✓ Services
  - ✓ Schedule
  - ✓ Fees and Reimbursed Expenses
  - ✓ Termination Clauses
  - ✓ Personnel
  - ✓ Payment Terms
  - ✓ Location