



There are three reasons to hire a consultant:

1. You don't have the time
2. You don't have the expertise
3. You need a neutral or external perspective

## How to Hire a Consultant

OPG's long-term relationships with satisfied clients begin with the first phone call. A client who chooses OPG based on a solid selection process has better consultation outcomes.

To that end, OPG offers the following advice on how to choose and work with a consultant.

If your organization is considering consulting services, you may be grappling with a difficult and perhaps long-term situation. You may not know where to begin and if you've thought through multiple solutions, there may not seem to be any "good" ones. That's why you're looking for advice and assistance.

The good news is that an external consultant can provide you with expertise, assistance, time, and wisdom to help you deal with the problem. They can provide counsel and objectivity for dealing with tough issues.

The bad news is that an external consultant cannot work miracles. They cannot solve your problems for you. Resolving long-term, systemic problems often requires firm action and tough-mindedness. Obviously, this requires a trusting relationship between you and the consultant you select, so **getting the right consultant on board is critical to success.**

### BEFORE CONTACTING A CONSULTANT

In the long run, it pays to take the time to define the outcomes you want by becoming clear on the following:

- ❖ What you want to accomplish
- ❖ How you perceive the issue at hand
- ❖ What you would like the consultant to do

Before contacting a consultant, make sure that you can answer the following questions:

- *Do you have a clear understanding of what you want to accomplish?*  
A consulting assignment without specific, measurable targets usually results in disappointment. Clarify in your own mind what you want to accomplish along with the reasons why it is important.



*The targets for your consulting project should be **specific and measurable** – it will help your organization clarify what it is trying to achieve and also avoid any misunderstandings about goals between you and your consultant.*



- *How should the organization be different after the consultant leaves?*  
If nothing major will change, your problem is an irritation, not something that requires an outside consultant.
- *What role do you want the consultant to play?*  
Are you looking for direct intervention? Do you want the consultant to advise you? Design solutions? Implement them?
- *What is it worth to you and your organization to solve this problem?*  
By determining the financial and psychological costs of this problem to your organization, you will be able to better determine if the cost of a consultant is worth the benefit.
- *What's your time frame?*  
No matter how well-qualified the consultant and no matter how perfect a match, do not go forward if they are not available to do the work within your time frame.
- *Who in the organization needs to participate in choosing the consultant?*  
Major stakeholders within the organization who are directly involved with the desired change should participate in choosing the consultant.



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*Your consultant's availability for the project **must match** your desired timeframe.*

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## INTERVIEWING CONSULTANTS

We recommend interviewing at least two consultants and asking the same questions of each. This allows you to better compare their experience and qualifications to your needs in a fair manner.

We recommend these steps for conducting the initial meeting:

1. Describe what will happen during the interview
2. Describe your situation
3. Conduct the interview
4. Ask for a proposal and references
5. Outline next steps and time frames

### **Describe what will happen during the interview**

Let the consultant know how you would like to proceed at this initial meeting; that is, that you will provide an overview of the problems and then ask some specific questions about their experience.



## Describe the situation

Continue by providing a general review of the problems that you are experiencing or the issue at hand. Describe the kind of assistance that you would like from the consultant. Allow for questions from the consultant, but remember that you also need to interview that person to assess their ability to meet your department's needs.

## Conduct the interview

Pay attention not only to the content of answers, but also to the consultant's personal manner and professional style. Is it a match for your organization? Here are some questions that we suggest you cover:



- ❖ *How would you describe the challenges we face from the limited amount you now know about us?*
- ❖ *Please describe similar consulting projects with other groups facing problems similar to ours*
- ❖ *What did you learn from the experience?*
- ❖ *What would you do differently if you could repeat the experience?*
- ❖ *Based on past experience what problems do you anticipate as we begin to work together?*
- ❖ *How can we best address these problems early on?*
- ❖ *Describe your consulting process. How would you propose working with me and our staff?*
- ❖ *What strengths do you possess that will prove particularly helpful in connection with this project?*
- ❖ *Are there other members of your consulting team who would be working with us? Who are they? Who will be the lead for our project?*
- ❖ *Will you be using other consultants?*
- ❖ *How would you propose to divide up the tasks among your team members?*
- ❖ *When can we interview them?*
- ❖ *How can we evaluate your success in solving our problem?*
- ❖ *What is your availability to complete this project within our time frame?*
- ❖ *If possible, can you tell us approximately how much this will cost?*
- ❖ *What else should we be asking you?*

## Ask for a proposal and references

It is common practice to request a proposal that outlines time frames, work process and what products and services will be delivered. If a consultant asks for payment for a proposal, this is only considered an acceptable practice if the proposal phase requires data analysis, site visits, or other significant time investments.

You should also ask for references to ascertain the consultant's ability to address your specific needs. We suggest that you ask for the name of the person who supervised the consultant's work directly. You might also ask for samples of their work.

The proposal will include estimated fees.



## Financial Arrangements

Discussing the fees in the proposal early on paves the way to open discussions in the future. Consultants typically charge a daily or hourly rate; sometimes a fixed rate is agreed upon for completion of an entire project.

- Do not agree to an open-ended fee.
- Make sure you discuss potentially hidden expenses from the beginning, such as travel costs, mileage, lodging, printing, etc.

All items are negotiable but they are more easily resolved when discussed in advance. For large projects or a project that will be conducted in phases, we do not recommend paying the consultant everything up front. A deposit is standard practice but not full payment.

*Phased payments, tied to milestones, are the best way to compensate an outside consultant.*

## Next Steps and Timeframes

Let the consultant know your next steps in the process and when you will next contact them. After you've completed your interviews, please follow-up and let each individual know whether or not they have received the assignment. Consultants are dedicated professionals who might be colleagues in other settings in the future.

## MAKING THE SELECTION DECISION

*The following steps will guide you through the selection decision-making process:*

1. Reviewing Proposals
2. Checking References
3. Final Decision
4. Writing the Contract

*Make sure you establish milestones tied to payment of fees – it is highly recommended to agree upon a set rate and not an open-ended fee.*

## Reviewing Proposals

A proposal mirrors how the consultant will present his or her work. Here are some criteria for evaluating the proposal:

- Demonstrated understanding of your problem or need
- Clear and succinct presentation of the ways in which they think they can solve the problem or meet your needs
- Specific overall goals including measurable objectives, "deliverables," and timeframes
- Estimated costs including method of payment and other financial terms
- Who will do the work and how much of it – although some consultants work alone, others belong to a consulting firm or bring in other consultants for specific aspects of the work. If other consultants will be brought in, what are their qualifications and experience?



## Checking References

Here's a process with questions to use with references:

❖ *Begin with an open-ended question.*

We're thinking about hiring Consultant X to (describe general nature of work). I understand they did some similar work for you. How did that work out?

❖ *Verify information.*

What was the kind of problem that the consultant addressed? What were his or her duties? How long did the project last?

❖ *Dig for more information on the quality of the work.*

Did the work achieve the desired results? Was the work completed on time and within budget? Under what conditions would you hire this consultant again? Do you have any recommendations for working effectively with this consultant?

Complete the interview with a last open-ended question.

❖ *Is there anything else you would like to tell me?*



## Final Decision

You've determined that a consultant has the right credentials. You've called all the references and they are glowing. What can go wrong? The best determination of whether a consultant will be successful is how comfortable you feel with that person and the degree to which you think there will be a personal fit with the organization. Since a good client-consultant relationship is ultimately based on trust, you need to have a good personal fit. Individuals within your organization will need to speak candidly with the consultant, if there is to be improvement. You must also be able to speak openly and candidly with that individual – a lack of openness compromises outcomes.

## Writing the Contract

After reviewing the proposal, make sure that you have all agreements in writing. Never rely on oral agreements – put everything in writing to make sure that expectations are clear.

In addition to the content covered within the proposal, make sure that the following items are included in the final contract:

- Schedule of deliverables and agreement on how changes to the contract will be handled
- Whether there are financial incentives for accelerated completion or penalties for delays
- Termination of the contract and terms for either or both parties terminating should be discussed and included in any agreement
- How much notice must be given and how compensation would be affected by a canceled agreement
- The form in which you will receive the recommendation from the consultant; it is strongly recommended that you require a written final report



## WORKING EFFECTIVELY WITH A CONSULTANT

Now that you've hired a consultant, it is in your best interest to take all the necessary steps to ensure a successful project. In many ways working with a consultant requires the same good managerial skills that you use with your regular employees. However, we do recommend the following additional steps:

- ❖ *Prepare your organization for the consultant's arrival in advance*  
People may be threatened by the arrival of an external consultant, so minimize reactions by introducing the consultant and explaining the project.
- ❖ *Schedule regular briefings and request progress reports*  
Maintain open communication so that the consultant is free to share any problems or issues that arise without fear of retaliation. The objective is to get the job done and this requires cooperation, open communication, and early recognition of any difficulties or problems.
- ❖ *Provide quick feedback to the consultant, both positive and negative*  
You are wasting time and resources if you do not give them guidance. Throughout the relationship, you must be frank and forthcoming about the problems that face your organization. Though it may be difficult, you must put aside your embarrassment and fears – and tell your consultant the entire story.

## BRINGING THE PROJECT TO A CLOSURE

### Review the project or intervention

As soon as the project is finished, take time to evaluate it. Will you implement the consultant's recommendations? What went well? What should have been done differently? This may be your first experience working with a consultant, but it's unlikely to be your last. Give the consultant as much honest feedback as you can. It's as important to him or her as the fee. Don't hesitate to call weeks or months later if you have a question. You can't expect the consultant to provide more service without an additional fee, but he or she should be willing to answer questions on what's been completed and paid for indefinitely.

### Written Report

In some situations you will have required a final written report from the consultant. The report should include:

- Goals and objectives
- What the consultant did to meet those goals and objectives
- Problems encountered and how they were addressed
- Results of project, specifically related to the goals and objectives
- Conclusions and recommendations





## Ending Relationships

Sometimes a consultant simply does not work out. Never hesitate to cut your losses if you're profoundly dissatisfied with what's going on or if there's obviously a bad fit between you, the consultant, and the organization. Whatever the reason, you have a responsibility to end the relationship as soon as you're convinced that it will not succeed. Negotiate payment for what's been done, triage the problems, and get someone else. The lifeblood of a consultant's practice is their reputation; they have everything to gain by making the termination as painless and private as possible.

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*If a consultant is not working out, **find a better match** between you and your organization and work with your current consultant to terminate the relationship as quickly as possible.*

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