



What Should I Ask My Consultant?

How to Get What Your Business Needs

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Bringing in outside expertise can help significantly when you have limited time or capability. Consulting help can be most beneficial when you are getting ready to enter a new market, a new business strategy, work in an area where you have limited expertise, or you just need to try something new. A fresh set of ideas from the outside can be particularly helpful. Additionally, consultants can contribute significantly when times are tough and you have limited resources to spend.

But how do you know you are getting what you are paying for? How can you be confident that the consultant is competent? There are many so called consultants in the market, and when economic times are tough, consultant can also be another word for unemployed. On the other hand, a consultant can be worth many times what you pay for their expertise and advice.

How to Prepare

What is your need? Why are you bringing in the expert? We frequently receive calls asking for consulting expertise, and helping people understand their own needs is often part of the process. Whether it is accounting software selection, paperless implementation, technology assessments, business continuity assessments or one of the other services our organization supplies, we will ask the Rudyard Kipling questions. His short poem outlines a set of questions that are universally applicable and cover most issues:

I keep six honest serving men
(They taught me all I knew);
Their names are What and Why and When
And How and Where and Who.

There are many reasons why this questions work to probe needs, and you should be prepared to answer them for your project. Even more clarity is possible if you consider preparing in the following way.

- Create a list of the top 10-15 things you want to accomplish. Place these items in priority or ranked order.
- Additionally create a list of 5-7 things you don't want to lose or harm when this project is completed. This priority list will help provide constraint.
- Consider the budget you are willing to spend on the project. Include your best estimate of capital, internal resources, and time so you can consider what you are willing to spend. Remember to include hardware, software, training, and dollars for outside labor. Consulting fees are likely to be just a portion of this crude budget. Double this number as a safety factor, and ask yourself if you still have this money to spend.
- Consider the benefits to the organization. List both tangible and intangible benefits. Place a value on the tangible benefits. Cut this number in half. If you only receive this much value, is the project still a good risk?

- Gather background information that an outsider will need to understand your organization. If this is an IT project, have a list of existing hardware, software, personnel resources, and locations available.
- Finally, describe what you are looking for in a consultant. Use your circle of business associates inside and outside the company, industry associations, and Internet research to find experts in the area that you need help. Consider existing consultants for continuity and safety. Consider new consultants for fresh ideas and approaches. Narrow the list based on qualifications of the consultant that match what you thought you were looking for. Keep an open mind.

What to Ask

Now that you are prepared to ask a consultant questions with your own needs in mind, consider some of the following questions. If it is clear the consultant will not work for your organization, stop at any time, thank them for their time and effort. If you know they won't work out, you can choose to tell them on the spot, or simply say that you will be back in touch with them. If a consultant is not selected, a short email or message to let them know that you appreciate their time and that you have selected someone else builds good will and reputation for your company, and preserves the probability that you could work together in the future.

- **Could you please tell me about your background and experience?** You are looking for comparable past experience and watching and listening for how you can interact with this person and their company. You want the consultant to speak first about their background so they don't filter the information to be what they think you want to hear.
- Describe your business and a little about your needs. Then ask the question: **What projects have you done that are similar?** You need to hear what has been done in the past by this person or group. One human resource interview technique and concept that is quite useful is that past behavior predicts future behavior. Asking questions about what has been done in the past often predicts what will happen in the future given similar circumstances.
- **Please describe a project where you were contracted that went wrong. How did you respond?** Listen for the technique used to resolve the issue. If your project doesn't go well, what response can you expect?
- **How would you manage our project to stay on budget and meet our timeframe?** You may need to discuss your expectations on dollars and schedule, or it is all right to state that you don't have an idea what your project requires. You are primarily looking for the style of management and controls for the project.
- **Given our situation, are there recommendations you would make?** You can learn something from everyone, and good consultants are generous with their knowledge. If the consultant is reticent to speak freely now, they probably lack depth and will be harder to work with during your project.
- **What team would be assigned to my project?** You need to know that are going to get an experienced team, and possibly the person you are interviewing. If you are speaking to a sales professional, it is wise to ask if you can speak to the person in that organization who will be involved in your project. You could ask similar questions of that person.

If you need a proposal response, explain what you would intend to do. Have a document explaining your needs ready to send, and confirm the timeframe you can expect a response. If the consultant misses this initial deadline, there is probability they will miss future deadlines.

Cautions

Beware of false experts. One of my greatest aggravations is “supposed experts” that turn out to be incompetent. Monitor your project closely, and make sure that you have the ability to disengage from an incompetent consultant. Review any document you intend to sign. If the scale of the project is larger, have your legal counsel review the document. You need the ability to get out of a bad engagement, and in some cases you will need recourse for lack of performance.

If it is possible, define steps and deliverables breaking your project into discrete pieces. It is better, but sometimes not possible to do this before the engagement is signed. Define the time frames and dollars for each step. Adjust these as necessary, and use them to manage progress. Review the progress at least once/week, and consider any missed reporting or variance from schedule an actionable item. Don't let a missed deadline slip more than one time, or you may be inviting future problems.

Reputable consultants can make a huge difference in your performance, and poor consultants can be a drain on resources. Great consultants will give you ideas and advice that you could never come up with on your own. In the final analysis, however, the responsibility for project success is yours.