

Finding the “Right” Consultant

5 valuable ideas to find the most qualified and “best fit” communications consultant for your organization

by **Tiffany Meyer, president of Numa Marketing**

Over the past year, I’ve spoken with many organizations about their consultant hiring experiences, and I was surprised by how many of them have had a negative story to tell. When resources are tight, you certainly want to be sure your consultant investment has positive results for your organization.

So how do you successfully meander your way through the thousands of communication and marketing consultants to find the one that will deliver? Here are several tried and true tips I encourage you to employ.

Over the past 15 years, I’ve served as consultant, employee and supervisor — participating in the hiring, management, and yes, even the “letting go” of communication consultants in a variety of capacities. Truth be told ... hiring a consultant can be intimidating, and finding the best fit for your professional working style is just as important as the consultant’s qualifications and fee structure. Follow these tips to support a much more successful consultant experience ...

Tip #1: Have realistic expectations

While your communication consultant is here to help you meet your business goals and ultimately make your job easier, many organizations can underestimate the time commitment needed when working with a consultant. It’s important to keep your expectations realistic.

Ask for clarity up front — ask the consultant how much time you will need to allocate to the project during your consultant interview. That way, you can go into the project knowing how much time you’ll be required to invest. Remember — just because one consultant requires less of your involvement doesn’t always mean he’s the better consultant. Partner this question with questions like: What methods do you employ to help us get necessary approvals and buy-in? If I’d prefer to be more hands-off and just let you get the job done, does that work for you? Or, how do you ensure we stay on budget and schedule while allowing us ultimate ownership throughout the process?

Tip #2: Have a budget in mind

If you’ve never hired a consultant before, determining your budget can feel like a shot in the dark. Some organizations keep the budget off of their RFP for fear that



they'll offer more money than is really necessary. The truth is, many firms and consultants simply won't respond to an RFP when a budget isn't included.

The trick is to do a little homework first. For instance, let's say you've been asked to create an RFP for graphic identity services — but you have no idea what the “going rate” for these services are. Call around to a few firms to ask for a very general ballpark of what they'd charge. Consider these price ranges with your own resources and determine a not-to-exceed consultant budget from there.

And absolutely include the budget in your RFP. Doing so will attract the consultants who can legitimately work with your budget. The step will help you avoid wasting your time, as well as the consultants who choose to apply.

Tip #3: Request — and contact — professional references

One of the most common methods organizations will use to find a consultant is through a recommendation from a colleague. Regardless of how you find your consultant, be sure to speak to at least two of their professional references for the opportunity to hear first hand what their experience was like.

Have your questions ready. Ask things like: how did you find the consultant; what services did they provide; did they meet deadlines and work within your project budget; have you worked with another consultant or firm before, and if so, how did the two experiences compare; what are a few aspects of this consultant experience that you found particularly valuable; and, what outcomes have you experienced as a result of their work?

Tip #4: Know what working style is important to you

Perhaps the most common — and often overlooked — aspect of a consultant/employer relationship gone awry is a difference in working styles, particularly in the level of involvement the client wishes to have (or not have) during the engagement. Sometimes we get so caught up in determining the firm's qualifications and experience that we forget to determine if our working style and personalities are also a good fit.

Working style is a critically important aspect of a positive working relationship — and consultants are no different in this regard. Before you schedule your consultant interview, jot down a list of things that you find very important to you in a working relationship or work experience.

Maybe it's a sense of humor or a light-hearted personality. Maybe it's meticulous attention to detail, a self-starter, or someone who is very well organized. Or maybe it's a shared value around starting meetings on time and finishing within the specified timeframe. Whatever your values and working style, determine in your consultant interview if these important elements are shared.

Tip #5: Determine deliverables up-front

Another common complaint I've heard from organizations about their consultant experience is that what they received and what they expected from the consultant were two different things.

The best protection from either incompetence or miscommunication is a service agreement or contract that clearly identifies all deliverables you will receive from the

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contractor. It is ultimately up to the employer organization to identify all items you want to receive in the written agreement.

Avoid assumptions — a stationary package for instance doesn't always include mailing labels, thank you cards, and notepads. Some designers are willing to provide native design files to you once the job has been sent to the printer, while others are not, depending on their internal policy regarding intellectual property ownership. If the deliverable isn't listed in the contract, your consultant may not be responsible for delivering it.

Follow these tips to make your next consultant hiring experience as positive as possible. Remember — it takes a bit of homework, clarity up-front, a sound service agreement, and open and honest communication.

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