

# Choosing a Consultant: How to Find the Right Expert

BY MICHELE D. NEWHOUSE

**C**ongratulations! You've finally been successful in getting a nominal amount of funding to hire a consultant. Now what do you do? Where do you start? Given the limited time and manpower you can devote to this assignment, you decide to shuffle through the business cards you've collected from consultants over the years. Smart move, at least in the initial stages of the project. The right resource will drastically shorten the time you need to complete the project. And if you make your selection carefully, you can be sure to have a consultant that will leave the methodology with you, avoiding costly re-engagements later!

## BUT WHY ARE YOU CONSIDERING A CONSULTANT?

The purpose of this column is to help you develop a strategy for choosing a consultant. Factors related to experience, expertise, effectiveness, and efficiency will be discussed in detail. However, the reason why you are bringing in an outside expert will influence the criteria you use in your selection process. Before you write your RFP (Request for Proposal), before you discuss a plan with your boss, and even before you take your next coffee break, determine your goal and write it down to help you stay focused!

## AN EXAMPLE SCENARIO

For the sake of this discussion, let's assume you're a telecom manager. You work for a thriving retail sales operation that does extensive mail-order business by phone and through the Internet. You love your job but can't sleep at night because you know that revenue could take an enormous hit should the phone lines or other data centers be down for any significant period of time.

Although the budgeted amount may not be enough to put in place the preventive

measures you feel are necessary, it might be enough to put together a Preliminary Business Impact Analysis (BIA).

You recognize the value of a well-done BIA. Besides scaring reluctant management into action on future project segments, it can also help you measure the risks to the core business in dollars and prioritize corrective/preventive measures that can be put in place. Then you will be able to see specifically where your systems and procedures are vulnerable as well as the probability of various interruptions to the business. Equally important, a well-prepared BIA will articulate these exposures to your boss. In short, one of your goals of bringing in an outside resource is to draw on his technical expertise. The second is to "sell the technology" to management.

Your hope then is a meaningful BIA. Your hope is to use the BIA as a means of justifying some of those protective measures (such as an uninterruptible power supply [UPS]) that you have been recommending. You can consider this portion of your project as the first step phase.

Now that you are properly focused, let's move on to screening those consultants!

## GETTING THE "SCOOP" ON A PROSPECTIVE CONSULTANT

Experience, expertise, effectiveness, and efficiency. Once you've determined your goal (which you've written down by now, right!?) and compared your candidates in these areas, you will be able to select the one best suited for your cause. Making the comparison is the difficult part because you generally aren't "comparing apples to apples." Each consulting firm will have its own unique track record and strengths. Generally, a consulting company's marketing

literature is a good start, but don't depend solely on it. Remember, your enterprise has its own unique needs and circumstances. Thus, as you look into the background of your candidates, be sure to cover the experience of both the consulting firm and the key players for your company's project. Beware of companies that offer "fill-in-the-blanks" prepackaged solutions. If that is all you need, surely you can find an inexpensive guidebook or prepackaged software to help you do it yourself. If you are unsure of who the good consultants are, consider issuing an RFP.

A well-prepared RFP can be a worthwhile tool for selecting the most qualified consultant. Personal interviews of the resulting "short list" of potential resources are generally in order as well. For example, some questions in an RFP may be worth repeating in a face-to-face interview in order to confirm the accuracy and completeness of the written response. A personal interview will also be critical in your final selection because it can help you gauge how well you and the consultant communicate. If a consultant can communicate well on paper but can't communicate well in person, you stand to lose a great deal. Your chosen resource needs to be particularly skilled at understanding your business needs. Your ultimate choice must also be someone with whom upper management can relate and to whom they will listen. Also, pay close attention to the responses you receive. You want to be certain your prospects understand your goal(s) and the scope of the project.

## COMPANY'S TRACK RECORD

Knowing a consulting firm has been in business for 57 years is not enough. Perhaps it was an entirely different line of

work even as recent as one year ago. Ask lots of questions and remember to read between the lines!

- ◆ How many years has the firm been in business? Has management changed?
- ◆ What type of consulting work is offered? Are other services or products offered?
- ◆ Does the company have a “specialty” area? Has that always been the case?
- ◆ Is the company “independent?” Does it receive any incentives (monetary or otherwise) for recommending certain products or services?
- ◆ What percentage of the consultant’s work is done for clients in my industry?

### PROJECT LEADERSHIP

Be sure to request a biography of the individual(s) who would be working on the project. And, before you hire, be sure you are given the opportunity to address questions directly to the proposed project manager(s). Many of the previous questions are appropriate for the project leader, but don’t overlook the following:

- ◆ What similar projects have you been in charge of?
- ◆ Who else will be working with you? What percentage of each person’s time can we expect?
- ◆ What do you feel is your area of personal expertise?
- ◆ Are there areas where you might want to draw on another’s expertise?
- ◆ Would you consider yourself a technologist? Please elaborate on your knowledge.
- ◆ How do you stay current on emerging technologies?

### LOOK FOR EFFECTIVENESS

Remember your goals! Will the consultant be able to communicate to your management about which preventive/corrective actions are necessary? Your chosen resource should be able to help you prioritize the

recommended solutions as well as teach your people the methodologies.

### PROVEN AND ACCEPTED METHODOLOGY

Ask about the company’s techniques and general approach to the project. Ask why they think their particular methodology works. One method of measuring the effectiveness of an approach is by determining how much public scrutiny the methodologies have undergone. For example:

- ◆ Have your procedures and techniques been published or presented in some public forum?
- ◆ Has anyone with the company authored books or articles covering BIA methodologies?
- ◆ Do you or other individuals from the company lead seminars, speak, or otherwise train others on “conducting an effective BIA?”
- ◆ How do you plan to find out about our company’s business and technology needs?
- ◆ How do you go about gathering information? With what level of management do you generally work?

### USABILITY OF FINAL REPORT

Obviously, even the most timely, all-encompassing report is of no use if it is not presented in a usable format. And report findings are not useful unless given with meaningful, concrete recommendations. Be sure you will be happy with the end product(s). For example:

- ◆ Will recommendations be prioritized? Will cost estimates be given?
- ◆ Are “briefings” generally done at the completion of the project? If so, how many and for whom?
- ◆ What has been your past experience with regard to the briefings and recommendations you have made? Has there been a general consensus and willingness to take action?
- ◆ What sort of deliverable can be expected? (Ask to see a sample.) What will you be able to do with it?

- ◆ Is the document easy to scan? (Remember some managers will only want the “bottom line” while others will want all the nitty-gritty details. Look for “user friendly” charts, cross references, and summaries.)

### SEEK EFFICIENCY

No matter what you spend, if the consultant can’t produce your final deliverable in a timely fashion the project can lose all meaning. Consider all the “vaporware” currently on the market — all promises and nothing to show for it. On the other hand, a good finished product delivered with a hefty, over-budget invoice can wipe out resources you planned to use for implementing the recommendations! Fees and timeliness should both be considered in your evaluation of a consultant’s efficiency. Don’t overlook basic questions such as:

- ◆ How many interviews do you anticipate in the information gathering mode? Who will you be interviewing?
- ◆ When can our company expect to have the final deliverable?
- ◆ What interim feedback can we expect?
- ◆ Have you historically met projected deadlines for similar projects?

### ON A FINAL NOTE

Take the time to ask all the appropriate questions and to scrutinize the responses. Remember that the initial time spent in choosing the right resource will easily pay for itself over the course of the project. But don’t let your company fall into an “eternal procrastination” mode. Set a target date for making the final selection so that your project can get off the ground. Be sure to ask basic questions such as the following:

- ◆ Can you provide reliable references?
- ◆ Have you had much “call back” work? (Additional work beyond the original contract.) If a client liked the consultant well enough to give him additional projects, that’s a good sign! On the other hand, the “call back” work may have been a re-engagement or extension of the original project due to the consultant’s failure to fulfill its original obligations. Probe for details.

General catch-all questions give the consultant an opportunity to “sell his strong points.” The answers can be very enlightening. Ask some open-ended questions to allow your prospects the chance to tell you why you should pick them. (Be prepared though. You might want to have your assistant beep you at a predetermined time. Then you could politely excuse yourself from a long-winded monologue if necessary!)

- ◆ What do you feel you can offer that other consultants might not?
- ◆ Is there anything else you can tell our company that might assist us in choosing a consultant?
- ◆ What criteria would you use in selecting a consultant for this job? What other questions would you ask?

selection process. Consider what criteria will be most meaningful in helping you achieve your unique goal(s). Then, methodically uncover the pertinent experience and expertise each of your prospective consultants has as well as how effective and efficient each is. With diligence, you can find just the right consultant for your project. Good luck! 



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#### **HAPPY HUNTING!**

In summary, start with a clear understanding of the reason(s) you are seeking an outside expert before you begin the

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