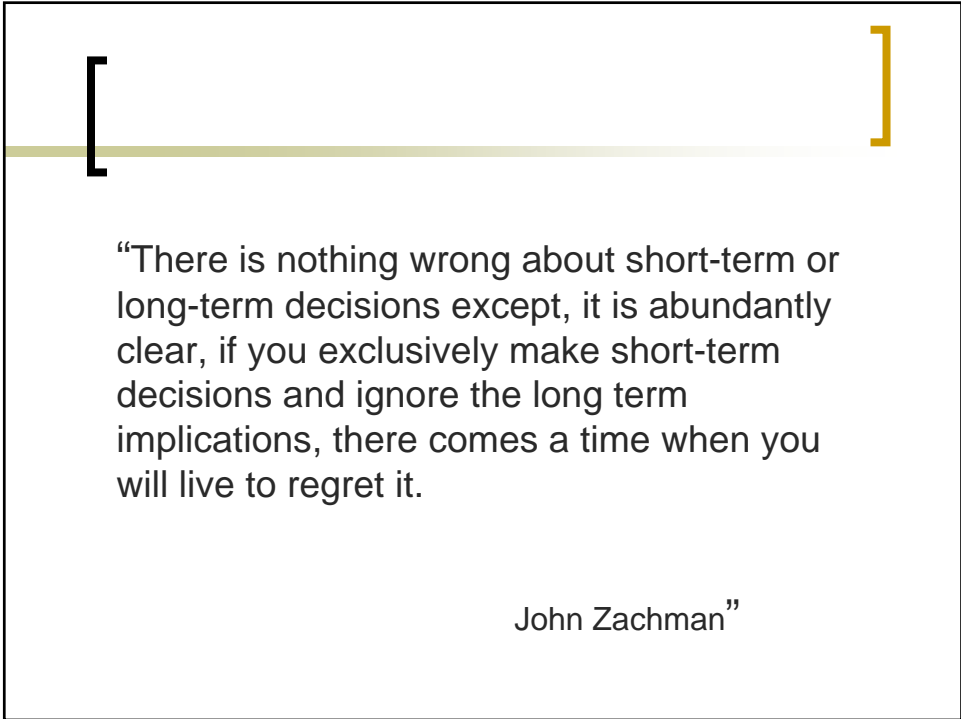




How to Choose a Consultant

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“There is nothing wrong about short-term or long-term decisions except, it is abundantly clear, if you exclusively make short-term decisions and ignore the long term implications, there comes a time when you will live to regret it.

John Zachman”

Why Hire a Consultant?

- There is a need for organizational changes or a crisis
- When there is a need for special expertise
- There is a need for an objective point of view
- The organization does not want to hire or utilize permanent staff to handle the project
- Assured confidentiality
- Results

Know What You Want

- Expectation (What is needed)
- What needs to be accomplished (End Product)
- Know what skills or expertise are needed
- Know who will be your Internal contacts and team leader(s)
- Directional approach-Internal/External
- Have a time frame

Do's & Don'ts

- Do know what you want
- Do utilize staff expertise
- Check on the consultant(s) to see if they meet your needs
- Do not give a vendor/consultant partial information. Have the work or needs defined
- Never let the vendor determine your needs

Types of Consultant Independent

- Has no ties or allegiance to a manufacturer or contractor
- Employed by your organization to work for you to provide advice for specific needs
- Independent consultants can be an individual or small/large firm

Types of Consultant Vendor / Product

- Represents or is affiliated to/with a manufacturer or contractor
- Employed by your organization to work, recommend or give the best advice on a product or help make a decision for your specific need

Independent/Individual Consultant PRO'S

- Specialized in their field
- Personal/Individualized attention to the project
- Informed on all aspects of the project
- Easier to form a long term relationships
- Negotiations and changes may not require levels of approval

[Independent/Individual Consultant CON'S]

- Specialized
- May be limited in number of things that can be covered in a project
- Financial Limitations (expenses/charges)
- Possible staff limitation due to the number of clients.

[Vendor/Product Consultant PRO'S]

- Specialized Teams with cumulative expertise
- Financial Resources
- More staff coverage
- Structured Processes

Vendor/Product Consultant CON'S

- Have a “Sales Team” then the team that implements the project
- Structured processes are not necessarily flexible
- Smaller clients/budgets may receive less attention
- Possibility of more analysis then insight
- Project can be arranged to suit the product

Choosing the Consultant

- Compile a checklist for short listing consultants
- Determine whether you want to interview and obtain an independent proposal or an RFP has to be written
- Meet with the consultant(s)

Choosing the Consultant

- Set the interview process
 1. Who will initiate the interview
 2. Determine Internal staff/persons to be present for the interview
 3. Develop a list of questions
 4. Have an evaluation process

Choosing the Consultant

- Discuss Fees, Estimates
- Discuss Project Timeline
- Ask the same questions and supply the same information to all consultants/vendors

Major Questions to Ask

- Do you have the qualifications and expertise relevant to the project?
- Do you understand the project?
- What would be your work plan or process to complete this project?
- Can and do you and your staff have the time to meet our deadline?

General Inclusions for a Contract or RFP

- Include all Internal Organizational Requirements
- Work Plan (Scope of Work): tasks, timeline, expectations and outcome
- Workplace: Consultants administrative requirements; equipment; supplies, etc.
- Fees: hourly, daily, set fee; billing and invoice(s) due date
- Additional Costs: travel, phone, administrative, etc.
- Termination Clause (large or extended projects)
- Rights to Data: proprietary information or need for confidentiality

Final Considerations

- What you want is not always entirely achievable.
- Evaluate each proposal before comparing them.
- Narrow your list of proposals based on your greatest needs down to the least, in that order.
- Were the requirements met?
- The most inexpensive or expensive proposal is not always the best choice.
- Do you feel comfortable with your choice?

GOOD LUCK

QUESTIONS?????