

## Consultants: Well-Chosen They're a Boon to Organizations

By Judith G. Lindenberger

In the September 2003 issue of *My Business Magazine*, one of the top five ways to find more time is ... outsource human resources. Hiring a consultant doesn't have to be scary, expensive or lots of work. I know, because I have both hired consultants and work as one. If you want to learn how to find good consultants who will help you get the results you need, read on.

In my experience, there are 5 essential steps to take when choosing and using consultants.

1. Discern your needs
2. Give yourself permission
3. Pick the best
4. Manage the process
5. Assess the value

### 1. Discern Your Needs

First, ask yourself, what is the problem that needs to be addressed?

Answering this question helps you clearly state what needs to be done. Only when this is accomplished can you proceed.

Your reasons for hiring a consultant could include:

- You don't know how. A consultant offers *skills and expertise you don't have* in house.
- You don't have the time. A consultant, guided by experience and expertise, can *get the job done more quickly*.
- You can't assign it to anyone in-house. A consultant can work on *confidential projects* (such as hiring or firing).
- You need an outside perspective. You might need a consultant when you are looking for someone to *see the situation objectively*, without the filters and preconceived notions that internal people may have (i.e., designing, conducting and presenting results of an employee survey).
- You need everyone to participate. Using a consultant will enable all staff to fully participate in a process such as strategic planning, without one of them having to *wear a facilitator's or coordinator's hat* too.
- You need to learn best practices. Because they have a breadth of experiences from different organizations, a consultant can ask the right questions, *moving your organization to greater learning and success*.

### 2. Give Yourself Permission

We all face difficult times when there is no new input, no objective analysis, no one to talk to, no one to share ideas with, and no one who can give advice based on experience and objective observation.

It is exactly those times when we need we need a guide, who has been there; done that, to help us make the best decisions and lead us reach our goals.

### 3. Pick the Best

Cast a wide net. The best ways to find a good consultant include:

1. Ask around – word of mouth is still *the best way* to get information on which consultants have done good work in the past.
2. Rehire a known consultant who has done a similar or equally difficult job or ask a consultant you trust for a referral.
3. Use lists of qualified experts – you can get these from professional organizations or by doing a search on the Internet.

Request proposals. A proposal should outline both how the consultant would meet your organization's goals and objectives and the cost.

Choose a *short list* of the best people or firms from those who send in proposals. Interview the short-list. Ask the consultant:

1. Who have you worked with?
2. What have you done?
3. What were the results?
4. What is your specific expertise?
5. What don't you do well?

Just the answers to those 5 questions will give you a pretty good idea of what you can expect from a consultant.

Decide who the best candidate is by evaluating each person on the three C's:

1. *Competence* — Can he/she do the job?
2. *Compatibility* — Can he/she do the job here in this organization?
3. *Chemistry* — Will he/she and the team work well together?

Check references. The best references come from people and organizations for which the consultants have worked.

#### **4. Manage the Process**

Make sure you have a contract with the consultant. A contract clearly states who is responsible for what. A contract is a two-way street. You expect the consultant to do a good job, produce acceptable results, and complete the work on schedule. The consultant expects to be paid on time for the work he or she does.

Choose a project leader to manage the project. The project leader and the consultant should meet regularly to review progress and keep track of expenses. The project leader should also meet regularly with members of your organization to let them know how things are going.

In order to make the consulting experience a success remember these two rules of thumb:

- Talk over your expectations with the consultant to ensure that they are reasonable and achievable.
- Anticipate and provide the resources your consultant will need such as time, information and access.

#### **5. Assess the Value**

When the consultant has finished his/her work for you, it is useful to review the whole experience. Look at both the accomplishments and problem areas.

The bottom line is: Did the consultant help the organization solve the problem? Is your organization better off as a result of the services of the consultant? Has the organization learned a new skill?

In conclusion, set your expectations at a realistic level. A consultant is simply another human being with experience different from yours.

Don't expect miracles. Expect that over the long term, advice from a good consultant will help you make the right decisions more times than not; will help you take short cuts rather than reinventing the wheel; will improve your chances for success; and will make your job much easier.

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