

How to choose a consultant?

By Mary Kate Scott

Do you have several proposals from strategy consultants? These questions are designed to help you make the right selection for your project and team.

A client recently asked me how he might select between different consultants and their firms. The simple answer would be to say “pick my firm”; but in fact that may not be the right answer. The sooner the client and the consultant know they have the right match between a client’s challenge and the consultant’s expertise and approach – the better for both parties.

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Consultants can offer three types of value to your organization: capacity, expertise, and independence... what is critical for your specific challenge and team?

your specific challenge and team? Understanding why you want a consulting firm and how you anticipate the consultant(s) will add value is a useful lens to view different consultants.

expertise, and independence (sometimes called voice). Usually consultants are engaged for all three reasons. What is critical for

What is most needed? Do you have the expertise and solutions in house but need an additional team member to deliver a project? Consultants might not always like to acknowledge that clients simply need additional short-term capacity, but this can be the case. Or do you need new thinking, industry expertise in an area, abilities such as strategic innovation or workshop facilitation or new business development? Or do you need independence from the situation? You may need an independent intermediary, someone who can view your situation with fresh eyes and who can also serve as a neutral conduit for feedback from within the organization.

Experienced executives know the first set of core questions to ask the prospective consultant. The consultant’s early behaviors and responses can provide some guidance on how they would solve your problem, work with you and your team and how they might manage the project.

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1. Probe actual experience on successful projects.

Go beyond a simple listing of past projects with the potential consultant.

Request a list of what they consider their most successful projects. Understand why they think these projects were successful.

Instead, request a list of what they consider their most successful projects. Understand why they think these projects were successful. What specific results do they discuss? What is success to this consultant? Ask them how they made tradeoffs during a project to reach success.

Probe on client acceptance and implementation of their successful projects. Ask about timelines and resources and how they made tradeoffs to reach success.

Finally probe on the solutions created in terms of imagination and uniqueness of the final recommendations, the practicality of solutions, and how the

Probe on the solutions created in terms of imagination and uniqueness of the final recommendations

consultants leveraged the clients' strengths and overcame limitations in order to achieve the success.

2. Assess ability to create unique solutions.

Does this firm focus on custom or packaged solutions (if that is critical to your problem or opportunity).

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Experience in the industry does not always equate to a uniquely appropriate answer for your organization.

3. Consider cultural compatibility.

Is this person the right fit for you? You will need to be able to have honest and tough conversations with the consultant(s) to get to the right solutions. Be willing to discuss your company and/or team characteristics: do you have committee decision-making or do you "win in the meeting and yet lose in corridor" or a tendency for shared or individual credit? Ask the consultant(s) how s/he would manage your situation.

4. Gauge client skills

Determine approach and flexibility by asking about a particularly tricky client relations problem and how the consultant handled it. How does this consultant manage reticent clients, or intense disagreement, or a dominant personality in a workshop -- ask how they were able to reach a good outcome.

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Ensure you know if the consultant will spend time on site, or work remotely; understand how often and how they

will engage with your team.

Some consultants suggest a need to be continuously on site which may or may not match your team and situation.

Make sure who you know who will lead the team and how much time will this leader will spend on the project, with you, your team and their own team.

5. Assess pace. Do you share the same pace as your consultant – will they try to move so quickly that your team will not buy into solutions or do you sense a penchant for “over-diagnosis” or excessive time spent on creating presentations versus finding and assessing solutions?

You might ask how your proposed project could be done in half the time and what and what you might lose. Or what would you gain if you allowed double the time (or resources); what additional value you would receive.

Ask how the proposed project could be done in half the time and what you'd lose. Or what you'd gain if you allowed double the time?

Asking these questions as part of the early interview process, will help you assess and create a relationship and a project contract that will deliver strong results.

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