

## What Am I Getting Into?

### **Finding and Hiring a Business Technology Consultant**

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### Introduction

Today, business & industry face a dizzying array of technical choices. Often the only people that are available to help make decisions in this critical area are sales representatives for the products under consideration. This leaves the organization without any objective party to look out for their interests.

More and more frequently, as in-house resources become scarcer and impartiality is required, organizations are turning to consultants to get the job done. The larger and more complex the project, the greater the degree of sophistication, the more limited the availability of internal staff experienced in projects of the magnitude being undertaken, and the greater the concern about vendor objectivity and effective system design/ implementation, the greater the need for expert, experienced, consulting support. Obviously the decision to utilize independent consultants can be a prudent one -- one that can provide significant tangible value to a business, large or small.

Hiring a consultant for the first time can be a little intimidating. This “white paper” provides basic information that will help your organization find and make the best use of consultants.

### Do You Really Need A Consultant?

No you don't. And you don't need to take driving lessons to learn how to operate your car. Just get behind the wheel and stomp on the accelerator. Sooner or later, you'll get the hang of it. (Hopefully sooner!)

### Can We Do It Ourselves?

Perhaps internal staff can successfully do the work that needs to be done. The answer lies in the identification and evaluation of a number of variables that exist within every organization for every project contemplated. Here's a short checklist to help assess whether it might be possible to use in-house talent.

- Have the company managers and executives had a chance to look at the job to see if your organization has the skills required?
- Do you and others in the organization think that the organization would be able to do the job?
- Could you re-assign staff to work on the project?

If you answered yes to all these questions, your organization could probably handle the job. If you feel your organization can't do the job on its own, the next step is to look at other sources of help.

### What Other Sources Of Help (Other Than Consultants) Are Available?

- **Vendors**

Most of us are familiar with the companies that make computers and software. However, these companies are not equipped to provide detailed, customized assistance for every type of computing question. Rather, these companies provide support for their unique products. If you need assistance with making a product work in the context of a network or large-scale computing environment, vendors may quickly run short of the expertise to solve your problem.

- **Resellers**

The resellers who sell PCs, software and networks to organizations are often the first "experts" contacted when problems arise. Unfortunately, many of these resellers have more expertise in selling computers than in strategizing business processes. Maintaining technical skills and having the business savvy to manage vendor relationships is a constant challenge for these firms.

- **Community / Moonlighters**

Ask your peers, friends and relatives "in the business" about their experiences. By comparing notes, you can find out how they approached a job or problem, learn how to avoid problems or difficulties before they happen, and get other useful ideas for your own project.

## **Making The Decision**

Vendors and resellers are good resources for fixing what's broken...to a point. But when translating business goals and strategy into technology infrastructure or building a very sophisticated system, it may be time to call in a consultant.

In contrast to vendors and resellers, consultants focus on the application of technology rather than on the in-depth knowledge required to troubleshoot one family of products. Consultants may even be certified in one or more products, but will concentrate on helping you define what needs to be done and choosing the right tools for the job.

After looking at what you have in-house, and the kind of help you can get from outside sources, you may decide that you need the services of a consultant. Basically, you should hire a consultant if:

- no one in the organization has the time or expertise to do the job
- you tried previously to do the job (or a similar one), and failed to achieve the desired results
- the Board or owner is likely to value a consultant's recommendations or solution more than its own
- you need specialized help and advice

If you decide to hire a consultant, your next job is to find and choose the right one.

## **Finding the Right Consultant**

Here are some ways to find consultants:

- Ask around — word of mouth across organizations and peers is still the best way to get information on many things, including which consultants have done good work in the past.
- Rehire a known consultant who has done a similar or equally difficult job or ask a consultant you trust for a referral.
- Use lists of qualified experts — you can get these from professional organizations, such as Institute of Management Consultants, Project Management Institute, Information Systems Audit and Control Association, among others.
- Contact consulting companies — look in the yellow pages of the phone book under management consultants or business consultants.
- Advertise in local or regional newspapers — briefly outline the job you want done, and ask consultants to reply if they are interested.

- Keep a file of resumes from people who have expressed interest in working with your organization. You never know when another situation may arise that finds you looking again.

## Ask Questions

A good consultant asks lots of questions. So too will good clients:

- How long have you been in business?
- What is your level and availability of both business and technical expertise and assistance?
- How many and what types of similar projects have you completed?
- How would you approach knowledge transfer with our staff?
- What benefits have other clients received from engaging you?
- Are references available?
- What warranty of work do you provide?

There may be additional questions specific to your project or organization.

## Coming to Terms

- **Define your needs.** Outline your specific goals. Be able to describe your vision for how the tools, environment or product will work at the end of the project in clear, non-jargon terms. Use proper terms for the technologies to be used. Become an informed consumer of the relevant technologies through your own or your potential consultant's resources.
- **Be selective.** The consulting industry is highly competitive. If a potential consulting resource won't meet your needs, keep looking. There is a wide variety of consulting services available in every price range with expertise in every kind of project imaginable. Look for certifications and specialized education to validate technical and business skills.
- **Ask for referrals and check references.** Seek out other organizations that have utilized consultants and ask for referrals. Be thorough in verifying the expertise and experience of potential resources, including certifications, reference letters and project descriptions. Ask for as much information as you feel you need to make informed comparisons, and don't be reluctant to call: Most consulting firms are happy to provide information-and even advice-over the phone without commitment.
- **Define the relationship.** Be aware of the kind of employment relationship you may be establishing-you may want to seek legal and/or tax advice before finalizing a contract, even though legal review is not necessary for a work agreement to be legally binding. Ask for detailed descriptions in writing of exactly what work will be performed and how it relates to your stated goals. Insist on clarity and "when in doubt, spell it out."
- **Be assertive in communicating your needs.** Don't assume that the consultant understands the purpose behind your project. Communicate often about your goals and ask for a re-statement of your desires in the consultant's own words. Detail your financial or knowledge limitations and clearly describe your expectations.

- **Negotiate.** Consulting firms rely on busy consultants for revenue and are always looking for ways to balance cash flow. Ask for discounts based on your financial constraints, limited utilization or partial payment in advance.
- **Stay involved in the project.** Accept ownership for the parts of the project you are capable of implementing and make it your responsibility to ensure that you understand on a conceptual level what is being done.
- **Keep the future in mind.** Remember, when the consultants are gone, your employees and management team will still be there. Ask about options for ongoing support, retainers, follow-up or future expansion before you begin your project. Make sure the consultants understand your future plans so they can design easily upgraded or expanded solutions.

### **Did You Get Your Money's Worth?**

When the consultants have finished their work for you, it is very useful to review the whole experience (lessons-learned). Look at both the accomplishments and problem areas.

- Did the consultant fully honor the contract?
- Did the consultant's work contribute to organization growth, development and independence?
- Did the project achieve its goals?
- Did the consultant come up with reasonable findings, conclusions and recommendations?
- Did the plans work out as hoped?
- Was the report, documentation or other deliverable clear and helpful?
- Did the project go smoothly, without misunderstandings?
- Were expectations realistic?
- Did you and the consultant work well together?
- Did you allow enough money in the contract to complete the project?
- Did the consultant provide useful information or teach skills to staff members?
- Would you hire this consultant again?
- Would you recommend this consultant to other organizations?

**The bottom line is:** did the consultant help your organization solve the problem? Is your organization better off as a result of the services of your chosen consultant?

### **Conclusion**

Choose consultants carefully and you'll usually get the kind of end result you need. Always say exactly what you want. Supervise the work performed. Be demanding — but fair — about the final services and deliverables you accept.

**Value Management Partners, LLC**  
Improving Project, Process and Business Performance

“Value Management Partners helps organizations reduce costs and increase productivity by improving business, project and process performance. Collaborating with your own internal resources in reviewing the projects and processes critical to your success, we provide practical and tactical recommendations for your improvement.”

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