

Choosing and Using Consultants

The following guidelines are for those wishing to employ management consultants. These “golden rules” are not prescriptive, but they should guide you towards making the most informed decisions resulting in successful completion of the project.

1. Clearly define the objectives that you hope to achieve.

- Describe the job you want done and specify the things you expect from the assignment.
- Understand precisely how you expect your business will benefit from the work.
- Decide on the timescale, scope and any constraints on the assignment.
- Clarify your own role, which key staff will be involved, and how their time will be made available.

2. Consult with others in your organisation to agree those objectives.

- Consult with appropriate fellow directors and managers on the nature of the problem.
- Jointly define your specific needs for the expertise you want. Is it a systems, human or skills problem?
- You may decide that you require regular "Executive Briefings" or Facilitated Sessions with the consultant rather than a prescribed assignment. Many clients obtain considerable value from scheduling assistance in this way - but make sure you still have a written fee quote and terms of reference.

3. Ensure the consultant provides a written proposal.

- Make sure you only ask a consultant to quote for the work who is qualified to carry it out.
- Invite the consultant to submit written proposals, which should typically include:
 - Their understanding of the problem
 - The brief
 - Names and CVs of the consultant(s) who will do the work
 - Experience of the firm
 - References
 - Other support provided by the firm
 - Work plan and timeshare - Reports and/or systems that will be supplied to you
 - Fees, expenses and schedules of payment
 - The inputs required from you

4. Brief the consultants properly.

- Prepare a concise brief which clearly defines the objectives, scope, timescale, reporting procedure and constraints of the project and agree it with others in your organisation that will have an influence on the outcome of the project.
- Remember that the fees of your preferred consultant may be negotiable.

5. See the individual consultant who will do the job and make sure that the 'chemistry' is right.

- Successful consultancy requires goodwill in human communications. Where possible, meet the consultant who will be doing the job and brief them well, using the written brief and any background information that you or they think necessary.

- Talk through the proposal with the consultant before making a final decision to ensure that you have any concerns answered. If you are not happy with any aspects of the proposal do not feel pressured into accepting them. Continue discussions with the consultant until full agreement on the proposal can be reached.

6. Review and agree a written contract before the assignment starts.

7. Be involved and in touch during the assignment.

- Using consultants effectively demands a commitment of time as well as money by clients.
- Remember that you must keep in touch with the progress of the assignment if you are to get the most from it. Consultants are likely to be most cost-effective when working to an agreed programme and timescale. Make sure there are regular progress meetings and that the consultant keeps you fully briefed on progress against the programme.
- To implement recommendations it is often most cost effective to involve the consultant together with your management.
- If you and your staff need to provide input, make sure that you do it within the agreed timescale. Extra costs may be incurred if you hold up the progress of the assignment. Consultancy requires an investment not only in fees but also in client time.
- Assignments are usually most effective when the work is done on the client's premises. Make sure you can provide suitable office space and administrative support for the consultants.
- You should aim to involve your staff in the assignment as early as possible so that they partly "own" the recommendations and have an interest in the results.
- Larger assignments are often most effective when run by a joint team of consultants and staff and when the contents of the consultant's report are agreed with the staff at a progress meeting.

8. Ensure that the consultant does not save surprises for the final report.

- The consultant's report is often his or her most tangible 'deliverable'; but it must be in a format which is beneficial to you. If necessary, ask the consultant to produce an early draft report so that you can discuss format, findings and recommendations with some of your colleagues before the final report is produced and issued.
- The final report should contain no surprises. If there are very confidential or contentious issues, ask for these to be put into a private letter rather than in the report itself. Make sure the report is written in a way you and your staff can understand and use. Tell the consultant as early as possible if you are not happy with it.
- Ask the consultant to make a presentation to you and your colleagues if this will help discussion on its conclusions. Visual and verbal presentation is often more concise and understandable if the final report is lengthy or complex.
- You should note, however, that some assignments will not result in a written report. If this is the case, make sure you understand what the deliverable will be before the assignment starts.

You may need to make arrangements for the management consultant to help with any implementation. This can be done cost-effectively by involving the consultant in regular progress meetings. Get a written fee quotation and proposal for any implementation work, even if it follows directly from an assignment

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