

Selecting Consultants

A profile of a competent consultant

I am sure that, at this point, if you could, you would ask me one simple question: How do I know which consultants to engage and which to stay away from? The honest answer would be that the selection rules aren't clear-cut and aren't a sufficient protection from being taken advantage of later on. If the opposite was true, the best consultants would get all assignments and the rest would be knocked out.

Since we all know that's not the case, either the rules are not definite or employers don't put enough efforts and don't exercise enough caution when selecting consultants. It is possible that there are elements of both.

The Check List below asks some questions that could help you concentrate on finding the right answers on consultant's background:

Qualifications

Has the consultant the formal qualifications to do the job? Does he know how to do the job? Are his qualifications recognised in the industry as appropriate for this particular kind of project?

Experience

How relevant is the consultant's experience? How much experience does he have and how could you benefit from that experience?

Motivation

How motivated is the consultant? What motivates him – money, sense of achievement, praise, working conditions, a promise of future contracts? Is he a self-starter or does he need some supervision?

Communication skills

Can the candidate express himself in writing and in good grammatical form? Can he express himself in individual and group situations orally? Is he a good listener? Can he effectively communicate his ideas, explain and present solutions and proposals?

Maturity and emotional stability

Is he able to cope with stress and pressures that are likely to be encountered during the project? Is he mature and responsible person who can make decisions and assume responsibility? Is he emotionally stable and fair and consistent in his dealings with his peers and clients?

Things to look for in a consultant

- Professional qualifications and relevant experience in the required discipline
- The capacity to communicate important ideas, concepts in a clear and effective way.
- A reference list of satisfied clients
- A thorough understanding of your business and the industry you are in.
- The ability to find and implement innovative and effective solutions to challenging problems
- A genuine commitment to helping you achieve them

Evaluation and Selection

There are two basic criteria for selecting consultants

- They can and will do a good job for you
- They will justify your decision to hire them by their performance and achievements on the assignment.

Selecting a consultant that is best suited for the assignment is far from trivial. To the inexperienced eye and less proving mind of a typical client, the difference between the fundamental characteristic of competing consulting firms is not at all significant. Therefore, when choice has to be made, it is usually based on variations of marginal importance, such as the impact of consultants' presentations, the quality of proposals or the personal feelings of the client. Clients are not different from average consumers of other, more prosaic goods. Their choice isn't always conscious, deliberate or fully backed up by reason.

Interviewing Consultants

No matter how thoroughly you've analysed consultants' proposals and quotes, investigated firm's background and experience, and checked references with former clients, you would be making a cardinal mistake if you wouldn't meet them in person. Even telephone contacts won't suffice. Only in a face to face meeting you'll be able to evaluate them fully and make a wise and prudent decision about engaging them or giving a chance to someone else.

Asking the right questions at the right time is the essence of success in every selection process. To properly evaluate various aspects of consultants' background, knowledge, experience, expertise, personality and capability, a structured questioning plan will prove a productive and infallible tool in every client's hand. A properly devised questioning strategy can reveal a lot. It would give an interviewer a clear idea about which questions should be asked, in what order, how and why.

Consultants who can talk well about themselves, their experience, education and past achievements, who can project (I didn't say possess) integrity, sincerity and the real interest in clients, are the ones who get assignments. The others, often more experienced, intelligent and hard working individuals and firms, who are not as good in marketing their services and selling themselves to prospective clients, more often than not don't get what they deserve – the plum jobs! What an irony!

Ask for specific, experience related examples. Don't be satisfied with vague, theoretical or future oriented answers. Ask for specific examples from consultant's past experience. Each case should address all three basic aspects of any behavioural situation:

- The situation (problem) that existed or task that had to be performed;
- The specific action taken or not taken by a consultant (and why or why not);
- The results or consequences of the action (or the lack of it).

The Image test

One of the most revealing questions you may ask during the evaluation interview is "Tell us in a minute or two why we should hire you in preference to other consultants?" The answers to this question are always illustrative.

Enthusiasm and Challenge

There are one-story intellects, two-story intellects, and three-story intellects with skylights. All fact collectors, who have no aim beyond their facts, are one-story men. Two-story men compare, reason, generalise, using the labours of fact collectors as well as their own. Three-story men idealise, imagine, predict; their best illumination comes from above, through the skylight.

Oliver Wendell Holmes

One man's boring job is someone else's challenge. The same applies to consultants. Enthusiasm is a quality relatively hard to find. When you do, appreciate it. Hire it. Enthusiasm is worth paying for, because it produces results and gets the job done.

The right cultural and personal fit

In the past, consultants were hired for their ability to talk. Now they get selected for their ability to listen.

Companies think in various ways, they value different things differently and use different styles – leadership styles, problem solving styles, communicating styles, project management styles, decision making styles. A good match between a client organisation and a consulting team (or individual) is critically important for success.

Culture is a mixture of values, beliefs, rules, stereotypes, rituals and taboos. Culture defines the company's philosophy, the way it handles business, the way it treats its employees (including consultants) and the way it responds to change.

The bases for a successful client – consultant relationship is the consultant's understanding of the industry and the market that that particular client operates in, as well as their understanding and knowledge of client's business and corporate policies and objectives. Such understanding is necessary to ensure that consulting services are delivered in a way that is consistent with, not in contradiction to (as happens in many cases) client's values, practices and overall corporate philosophy.

Rapport between a client and a consultant may determine the outcome of the whole relationship. Clients would rather deal with consultants they like, trust and feel comfortable with, than with those they don't know, don't like or have doubts about. The price may be right, the proposal may be a masterpiece of modern literature and an example of consulting craft and mastery, but if the chemistry between the two is not right, the whole relationship will end before it actually began and no contract will be signed.

Don't mistake likability with capability. Understand that the best qualified consultant is not necessarily the one you like or the one you are friends with.

Experience

Experience is the name everyone gives to his mistakes.

Oscar Wilde, Lady Windermere's Fan

There are three basic concerns for clients:

Can a consultant do a job?

This question evaluates their expertise, knowledge and experience. Are they capable of performing tasks you want them to perform? Have they done it before? How well did they do it and how successful were the outcomes of their past efforts.

Will the consultant do the job?

This question raises the issue of intent and goal. What is consultant's aim? Are they committed to finding solutions to problems and producing results for you, or just making a best effort and going through the motions (trying)? Are they after a contract simply to keep themselves busy over the quiet period or are they really dedicated to your cause?

Will the consultant fit into the organisation?

This is a question of compatibility between a consultant and client. How experienced are they in working with people from various backgrounds and with different attitudes and work methods? Will they be able to operate at an optimum level, or will their performance be hindered by the client's inefficiencies, fears, habits, culture?

The problem with evaluating capability and experience is that consultants judge themselves by what they feel capable of doing, while clients judge them by what they have already done.

Reference checking

It is hard to believe that a man is telling the truth when you know that you would lie if you were in his place.

H. L. Mencken

Telephone reference checks are very revealing. When you talk to the consultant's previous clients, look for a reluctance or hesitancy on the referee's part. It is much more difficult to praise people in person than in a written form.

The name of the referee will always be given to you by consultants. By choosing loyal referees consultants try to increase their chances of passing the reference checks. This is all nice and well, by all means talk to nominated clients. If you know of any other clients the consultant in question has worked for, you should get in touch with them, too. By using this strategy you can get a "second opinion", which is usually more realistic and less favourable, due to the fact that a second referee wasn't selected by the consultants themselves.

When you speak of previous clients of a consultant you want to employ, use some of the following "hard" questions:

Smart Reference Checking Questions

- Would you engage them again without hesitation?
- The assignment we are recruiting for is very challenging. It needs a consultant with strong _____ skills. Do you really think they have what it takes?
- What did they achieve while working for you? Did they meet the criteria required for the job?
- How do they compare with other firms in this field?
- Did you feel comfortable working with them? How did they fit into your company?
- Did they finish the project on time and within budget? What methods, techniques and solutions were used?
- Where would you say their strengths and weaknesses are?
- Are there any other particular issues that we should be aware of?

There are further issues to be discussed in this area which we will cover in our next Tech Briefs.