

How To Choose A Consultant

Article by Peggy Hailstone

In the lifecycle of a non-profit it's almost certain there will come a time when the services of a consultant are required. Whether the requirement is for Human Resources, Public Relations, Information Technology or a needs analysis there's a number of key criteria that can help you get value for money and ensure an outcome that doesn't sit atop a bookshelf.

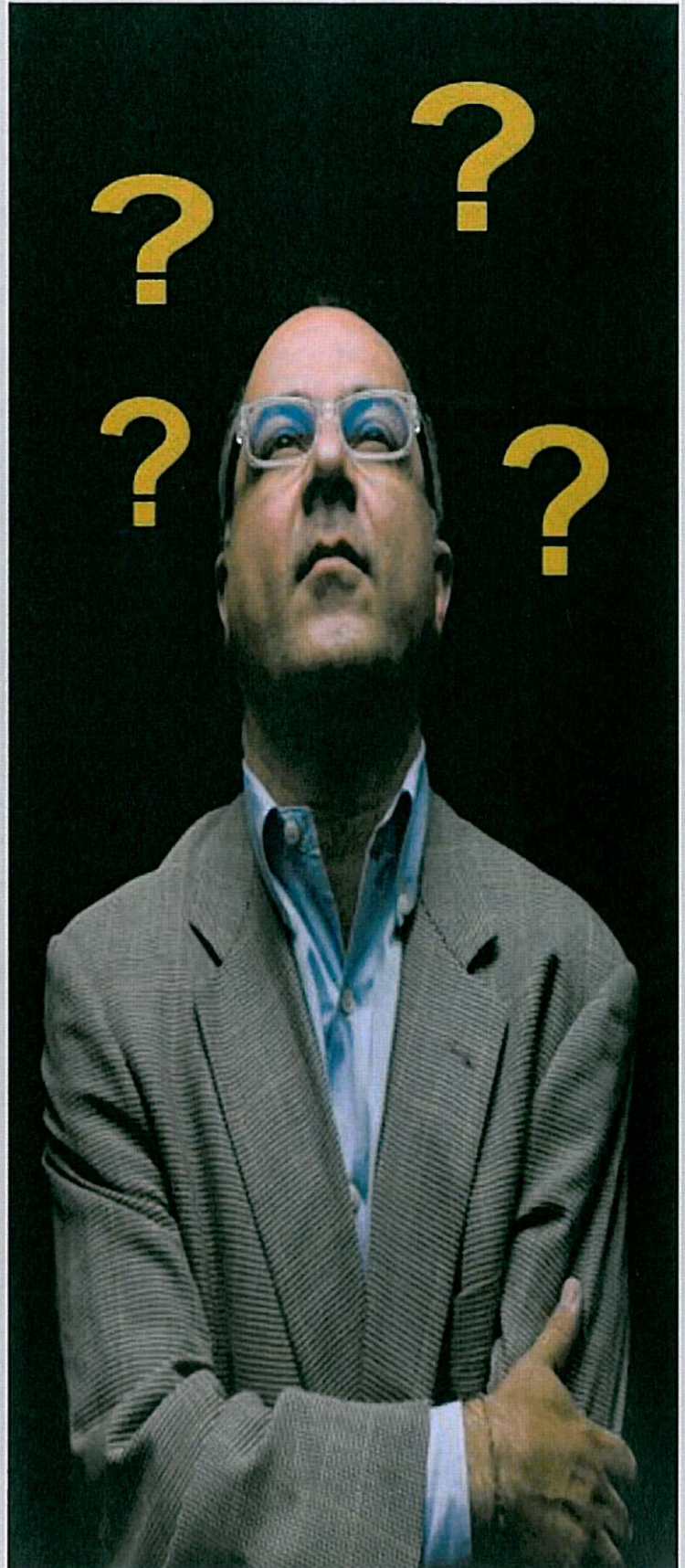
Up front, the best advice I've ever been given is that consultancy is a two-way interaction. So the first piece of guidance I'll offer is to steer clear of consultants who promise to do it all for you without your input (interference), and without consultation with other staff or stakeholders (intrusion).

My second point of guidance is to ask questions. Lots of them. Many of them. A ton of them. Don't be scared. None will be wasted. For example: What's the consultant's experience? Expertise? How many gigs have they had recently? In the past five years? Can you access one of their reports/outcomes? What similar organisations and industries have they aided?

The purpose of these questions is to move you (and them) beyond simple (and quite annoying) testimonials. Testimonials that may (or may not) be true, and may (or may not) be written by their husband's brother's wife.

Any consultant worth their street cred will eagerly answer questions. Questions are their forum and a consultant worth their money will be delighted to share information about their success, experience, knowledge, and client achievements. I know I would (and do). If, in contrast, questions are met with superiority or defensiveness—or if they tell you they're too busy, that it's the big picture that really matters—move on immediately. Consultants operating at this level are in it for themselves rather than to creatively and genuinely affect change.

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Back in 1969, before consulting became a profession in its own right, academic theorist Ed Schein identified three ways to work with client systems: expert role, pair of hands role, or a collaborative role. It's a kind of irony that sometimes we think we need a consultant when really we just need an extra pair of hands. Forty years has seen some incredible changes, yet some of the basics haven't changed much at all.

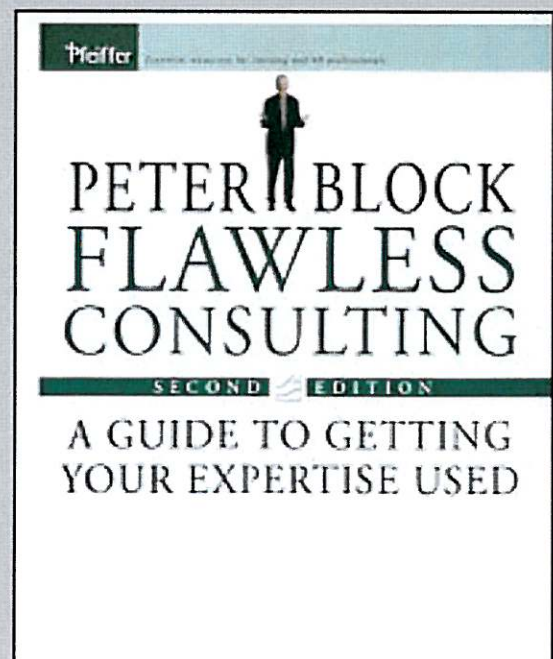
Don't forget that your local library or bookshop offers valuable and inexpensive resources. My top three consulting books are: 1) *Flawless Consulting* by Peter Block, 2) *The Business of Consulting: The Basics & Beyond* by Elaine Beich, and 3) *How to Succeed as an Independent Consultant* by Herman R Holtz & David Zhan. If you fancy something more academic, look out for *The Consulting Process in Action* by Gordon and Ronald Lippitt.

Armed with this basic knowledge I wish you many happy and successful consultancies. May your choices be wisely premised on a variety of questions, and may the results of your labour prove highly transformative for your organisation and self.

Following the basic or formative questions - formative because you are forming an opinion on capability and fit—the next most important query is around the consulting model. What type of consulting model underlies their work? Is it based on an academic or commercial model? Who else uses/has used this model? What evidence exists to show this model works, and will work, for your organisation?

Most consulting models have a minimum of five steps up to a maximum of a dozen (anything over this gets a bit cumbersome to manage). Knowing what the model is, up front, allows you to plan, organise, and allocate time and resources. These practicalities go a long way to ensuring best-practice consultancy, which leads to best possible organisation outcomes. I also tend to think of the consultancy model as a road map. Regardless of whether the project is long or short, without a map it's impossible to know exactly where the destination is, and which route you'll take to get there.

Finally, before you engage that expensive, highly recommended handsome consultant who saved the soul of Organisation X down the road, make sure it's really a consultant you need.



Peter Block's (1981) *Flawless Consulting* has sold millions of copies worldwide and is considered the industry 'bible'.

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