

How to Hire a Consultant

Guide to Engaging with Consultants

Provided by Junxion Strategies - a Vancouver Based Social Purpose Strategy Advisory Consultancy

Organizations need consultants. Whether for specific expertise, extra capacity, or both, adding consultants to your team is nearly inevitable. Do you know how to hire them?

We recently made a pitch for a piece of consulting business that was a perfect fit for our team—a combination of data analysis, narrative development, and public outreach, all in service of the client’s important civic engagement work.

The client had loved working with us on a previous, successful project, and invited us to apply for this job. We made the short list, interviewed for the project... and came second out of three. (It always sucks to come second: ‘Not first place, but worst place!’).

Yet the client handled the request for proposals (RFP) so well, we almost felt good losing. Among the other factors outlined below, part of what eased our pain was that the client gave us some helpful and constructive feedback on our submission, as well as asking for our feedback on their RFP process—which in turn inspired us to write this post. This mutual feedback strengthened our working relationship, despite us not landing the job this time around—a ‘silver lining’ to that disappointment.

Consider this: most organizations waste a fortune writing bad RFPs, assessing firms against the wrong criteria, or designing working relationships that are destined to fail.

Would you *choose* to start a new relationship on the wrong foot?

In 20-plus years of consulting, we’ve responded to hundreds of RFPs. We’ve seen the good, the bad, and the downright ugly. Those three criteria—good RFP, good assessment, good relationship design—do more than anything else to drive the success of your projects. So how should you hire your next consultant? Here are six best practices we look for when we respond to competitive requests for proposals....

Invite respondents directly

Some might argue that publishing an RFP to every consultant in a 100-mile radius will ensure the best will come knocking. Wrong. The best of us don’t respond to RFPs that cast a wide net. And even if we did, do you really want to spend hours (days?!) reviewing dozens of proposals to find the few that would have made your short-list in the first place? Instead, reach out to your

professional networks and get trusted referrals for the expertise you need. Go directly to a short list of three to five, send them your RFP, and plan on meeting with each of them.

Don't waste your time (or ours) describing the process

Experienced consultants say no if they don't think the fit is right. The best help you make the right connection.

Ensure your RFP clearly describes the problem, the project stakeholders, and the resources you have available to support the consultant (including budget, but more on that in a moment). Describe your vision of success, and the challenges you'll need to avoid along the way. *But let the respondents define the process.* Along with their demonstrated expertise and experience, their approach to solving your problem is a key element of the value they'll bring. If you dictate the approach, you shortchange yourself the opportunity to learn from the experts you're hiring.

Only three factors matter: Expertise, experience and fit

Don't make it more complicated than that. Don't create some convoluted, inhuman scoring system. If you're clear on the expertise you need, then you should be able to interview to discern consultants' qualifications. Ask them to talk you through case studies of similar work, so you understand their relevant experience, and ask to speak to some of those clients. A strong track record is the best indicator of a strong consultant.

Don't reduce your selection to a weird scoring rubric. Instead, discuss and debate with your colleagues until you're sure of the right choice.

Then there's 'fit.' The best consulting relationships are like the best employee relationships. If your new consultants are going to be part of your team, make sure they'll fit in! Find out what they think of the organizational values that underpin your culture. And ask yourself if you trust them. And ask yourself if you trust them. No, that's not a typo. I wrote that twice, because trust is imperative to building a successful working relationship.

Your budget or your scope of work must be specific

Experienced consultants are very good at adapting a project's scope to meet a strict budget cap, or making an informed estimate of the cost to meet a specific outcome. You can learn a lot from asking consultants what they would add or remove from the scope of the project if the budget were increased or decreased by 50%—they will understand what the trade-offs are.

Consultants understand that you're working within a budget. (We run businesses, too; we know how budgets work.) Just don't dismiss us if we say you haven't budgeted appropriately. This

works both ways: we'll tell you if you can get the work done for less than you think. Truly, we will. How else do you imagine we've built our hard-earned reputations?

What is frustrating for a consultant is to have an open-ended budget *and* scope in an RFP—e.g. “we want a website, tell us what you would do.” You'll struggle to compare the value for money of different consultants' proposals if they have had to guess at whether you want a smaller project for less money, or a larger project for more money, when both are potentially viable options.

Talk to consultants you don't hire

Simply put, politeness counts. If the consultants have taken the time to study your RFP, to get to know your work, your industry, and your issues, to write a proposal, and to meet with you, you owe them the courtesy of taking a few minutes to explain where they shone, and where they fell short. This isn't just to help them; they may also have feedback on how you ran the RFP process—lessons you can apply next time you need to bring in consulting expertise. If they were strong enough to make your original list, you may want to work with them in the future. So start building the relationship now.

One last piece of advice

After you've signed the contract, throw away the RFP. Yes, shred it. Why? Because now's the time to invest in your new partnership, and work alongside the consultant—*together* defining the problem, *together* describing the challenges, *together* developing the approach. What's with all this *togetherness*? You've just recruited well-qualified experts to your team. Give us the space to shine.

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