



How to Effectively Hire a Consultant

5 tips for a win-win relationship

Nonprofit and foundation leaders are held accountable to their stakeholders to make sure they are using their budgets to garner the best results. A strong relationship with quality consultants can help limited budgets go a long way, so it is imperative that you find a consultant who can become valuable member of your team. Simply choosing to hire a consultant isn't enough to guarantee a successful engagement. You need to clearly communicate your goals and work together to ensure they are met. Here are few guidelines to help you succeed when working with consultants.

1. Understand all your goals.

Before you choose a consultant, take the time to fully understand the problems you want to resolve. Be clear about what you expect the consultant to accomplish and identify all the key stakeholders who may need to be engaged in the project. It's also essential to identify any barriers that could influence the project, and to be very clear about your time frame and budget.

2. Identify the right consultant.

Once your goals are clearly outlined, find a consultant with the right skills and experience. For instance, you may need someone who speaks fluent Spanish, knows how to conduct qualitative data analysis, and has the interpersonal skills to get along with your staff. Would you prefer to work with a sole proprietor or a large consulting firm with more capacity? Do you need a consultant who knows your local community, or would it help to get an outside perspective? Once you have your short list, be sure to check references and conduct due diligence before finalizing an agreement.

3. Establish a clear relationship.

When you initiate a project with a new consultant, you are laying the foundation for a relationship that could prove to be highly beneficial for you and your organization for many years to come. Take the time to explain your needs clearly and answer any questions the consultant may have. Be sure to agree upon the scope of work: Include specific deliverables, a clear time line, and a set budget. Agree on how you will work together: Do you want to stay informed via e-mail or phone? How often? Do you want to schedule face-to-face meetings at key project milestones? Finally, provide your consultant with all the necessary introductions, along with background information and, if needed, infrastructure support.

4. Manage for success.

Even with the best consultant on your team, you won't be able to delegate everything, so be sure to build in enough time to manage your project. You may want to check in with your consultant on a regular basis to air any concerns, troubleshoot potential problems, review draft surveys and reports, or discuss preliminary findings. Be sure to pay the consultant on time, and remember that if you add deliverables to the contract, the fee and timeline may also need to be extended.



Putnam Consulting Group

Confident Giving • Dramatic Return

How to Effectively Hire a Consultant, continued

5. Conclude and debrief the engagement.

It seems obvious, but it is important to officially conclude your engagement when it is complete -- or when you're ready to move on to the next phase. Set a time to meet with your consultant to provide feedback on the deliverable and tell him or her how you intend to put the findings to work in your organization. Have an honest and productive conversation about the consulting relationship and discuss ways you might work more effectively together in the future. We all learn from experience, and this is where you both have the greatest opportunity to voice what you learned.

When you enter your relationship with a consultant with a shared, clear understanding of your goals, roles, and expectations, you are on your way to a successful endeavor. Working as a team and managing the project together gets you one step closer to your ultimate target. And with clear follow-up about what worked and where there were challenges, you might find that you are well on your way to a long-term business relationship that is a win-win for everyone.

© Kris Putnam-Walkerly 2014. All rights reserved. Kris Putnam-Walkerly, MSW, is president of Putnam Consulting Group, Inc., a national philanthropy consulting firm helping foundations increase impact through smarter grantmaking. She is also the author of the *Philanthropy411* blog. She can be reached at 800-598-2102 or kris@putnam-consulting.com. Her website is <http://putnam-consulting.com>.