



APPOINTING & WORKING WITH CONSULTANTS

The right Consultant can be an invaluable one-off or ongoing resource to a business, conversely a poor Consultant can cost time, money and affect business efficiency and effectiveness. This Info Sheet provides insights for appointing and working with Consultants.

Return on Investment

A good Consultant can provide expertise, address issues and guide on establishing, implementing and improving a management system and gaining accreditation to standards such as ISO 9001 (quality), ISO 14001 (environment) and ISO 45001.

However, deciding to use a Consultant, finding the right one and getting best value from their input is no easy task. Kitney's Info Sheet 'Finding a Great Consultant' and the steps in this info sheet below provide invaluable insights for deciding on and using a Consultant.

Key Steps to Using a Consultant

1. Be clear why a Consultant may be used

Understand what your business is looking for. This may be expertise, additional resource, experience or to provide an external perspective. See the Kitney Info Sheet 'Finding a Great External Consultant' to assist in this.

2. Involve others and confirm services needed

Involve others to choose the Consultant and decide on services. Consultants may offer similar services (e.g. analysis, planning, documenting processes, recommending good practice, education, internal audits and system improvement), but will have different experience, styles and approaches.

3. Use selection criteria

Selection criteria are essential for appointing the right Consultant. Consider factors such as credentials, qualifications, registrations, experience, interpersonal skills, availability, access, references, cost and reliability.

4. Find and meet possible Consultants

Use word of mouth/referrals, contacts, prior use, professional directories, advertisements and Consultant lists from recognised bodies to find potential Consultants. Initial meetings will narrow the shortlist. Refer to Kitney's Info Sheet 'Finding a Great External Consultant' to help with discussions.

5. Request and review proposals

Ask possible Consultants to submit proposals to reflect the work required. Proposals should include scope, timing, approach, fees, expenses and how materials will be provided. Use the selection criteria to review responses and confirm who will complete the work, especially from consulting firms or larger providers.



5 TIPS FOR IDENTIFYING AND WORKING WITH A CONSULTANT

TIP #1

Understand why a Consultant is needed and the value they should bring to the business.

TIP #2

Involve others in determining selection criteria, identifying and choosing the Consultant.

TIP #3

Agree terms upfront, in particular who will do the work, how it will be completed and key milestones.

TIP #4

Appoint a point of contact and ensure the Consultant has access to people, documents & information.

TIP #5

Monitor progress and address scope creep or issues as soon as possible.

6. Choose the Consultant

Be objective in considering selection criteria and other factors such as personality type, communication and interpersonal skills and potential conflicts of interest. It's important to find a Consultant with the right background, skills, experience and approach to work.

7. Negotiate and agree terms

After initial selection discuss the work details with the Consultant. Fee may not be the deciding factor, but for a large project it is worthwhile seeing if fees can be reduced. Agree terms and expectations, e.g. time frames, site visits, meetings, project management, delivery of materials, confidentiality and fee payments.

8. Confirm the agreement and plan for services

The Agreement for work may be provided by the business or the consultant and should be agreed by both parties. This could be a legal contract or letter of understanding; generally speaking the larger the work, the more formal the agreement. A plan should be developed to lay down milestones and how services will be provided.

9. Communicate with and manage the Consultant

The business should appoint a primary contact or representative to have regular contact with the Consultant and provide access to people, documents and information. Regular contact should ensure questions are answered and issues or misunderstandings resolved promptly.

10. Monitor work and evaluate results

Progress reports and project meetings are invaluable for monitoring work to ensure services are on track and delivering on business needs. Scope changes, obstacles or delays should be identified early, discussed and addressed. Similarly, good progress should be celebrated to keep project momentum

Key Things to Avoid

Pitfalls to avoid in order to identify and work with a Consultant that suits your business include:

- Not understanding why a Consultant is needed and the solution they need to bring to the business.
- Not identifying a range of Consultants, obtaining proposals and following up on references.
- Not being clear on what is to be done, how it will be done and expecting too much for too little.
- Lack of planning, (fail to plan and plan to fail) agreeing milestones and monitoring progress.
- Relying on the Consultant to resolve issues that should really be dealt with by the business.

5 THINGS TO APPOINT AND WORK WITH A CONSULTANT:

- 1 _____
- 2 _____
- 3 _____
- 4 _____
- 5 _____

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