

Maximize Success in Working with a Consultant

by Deborah Seaman, MPH

You are going to launch one of the biggest improvement efforts ever in your department. You're anxious about it, and you're thinking about using an outside consultant to help guide you. Ask yourself:

What's my end game?

What is it you want to accomplish by hiring an external consultant? Outline the goals and possible measures of success. Have a timeline for the project and an idea about your budget.

Who's my ideal consultant?

You know that content expertise will be important; what other diagnostic, technical and interpersonal skills will also be needed? Are facilitation, presentation or training skills required? How about the ability to be "on site," versus being connected from a remote location? How well does the person need to understand your business or the culture of your organization? Do you want someone who is selling a product or a cookie cutter approach, or do you want a custom-designed approach?

Is it a good fit?

You've spoken with the consultant on the phone, read their background information, and reviewed their references. Now it's time to meet face-to-face to describe the situation while assessing fit on work style, approach, values, professional demeanor, asking and listening skills, and all the qualities your ideal consultant has.

Ask lots of questions, including some about their initial ideas for how to approach things. Ask them to write up a preliminary proposal covering the scope of services, timeline and fees. Then ask yourself if you are on the same wavelength about the situation and the options for approaching it. (Remember, what you experience during and after meeting the candidate is a good predictor of what your staff and others will experience.)

How much should I tell them?

Speak openly with the consultant about your organization, its cultural idiosyncrasies, and current issues as well as history. Answer questions as best as you can; be willing to say, "I don't know," and be coached to create more clarity. Often you don't even know what you need, since you aren't the expert. A good consultant knows their job is to help you clearly express the problem and help focus the assignment. Give the consultant some flexibility to address your needs, even if they don't seem at first glance to be what you had in mind. Agree on the intended outcomes and measures of success for the consultation and make any changes to the proposal. Lay out your mutual expectations on timeliness, meetings, coordination of logistics, modes of communication, payment etc. Co-plan the first steps together.

Am I obligated to follow every one of the consultant's recommendations?

Consider what is being recommended, discussing the pro's and con's, and any reservations you may have. Often, the consultant discovers that the project is bigger than you'd thought and will take more time. Don't be surprised by the suggestion that you could do additional things, add more time, etc. Yes, the budget may have to be altered, but an improved working environment is almost always worth the time, commitment and dollars you put into it. If you have a limited budget, tell the consultant. He or she will be able to help you assess where the money can be best spent. Explore with the consultant what will work best, and then make a decision.

How will I know if the things we are doing are working?

Participate with the consultant and engage others in evaluating progress on goals to date. Continue to do this at agreed upon milestones and on completion, in order to measure success and make needed modifications along the way. Give the consultant feedback on the results and on the process for achieving them for their own learning and growth.

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