



Appointing a Consultant - Things to Consider

1. **Build a balanced relationship.** Consultants need a different management approach from that used with freelance, contractor, or permanent team members. It's important to strike the right balance: as expensive resources, consultants need to be guided carefully, but, if you try to exert too much control, you can strain your relationship with them and affect their productivity.

Ensure you prepare a briefing document and discuss this with your consultant as this will help with building a balanced relationship. More information can be found further below on writing a briefing document for a consultant.

2. **Clarify the role.** Make sure that everyone involved in the project or task is clear about why the consultant has been hired, including the consultant themselves. Give them copies of the company's mission and vision statements along with other key documents, to help them to see the bigger picture. They also need to know about underlying issues that might not be discussed openly. For example, could office politics affect their project? And who are the key stakeholders that they should know about?
3. **Define direction.** Consultants need measurable goals, so work with them to set SMART goals. These not only clarify what you're expecting, but also allow you to measure their progress and performance.
4. **Practice scope control.** Projects may grow as time passes and needs increase. You may also have to contend with consultants who actively seek to expand their role to gain additional work. This is why it's important to practice scope control. Ensure that you've defined the project's vision and goals, set a budget, and established clear priorities.
5. **Get them up and running quickly.** Think about how overwhelming it is when you start a new job. Consultants go through this experience every time they start a new project, so they should be good at "getting up to speed." However, while they won't need as much onboarding as new employees, you do need to help them to get

acquainted with the organisation, with the team they'll be working with, and with the project that they'll be working on.

6. **Cement trust with the team.** It can be challenging to integrate consultants into an existing team, especially if they're being brought in to solve a problem that team members can't tackle on their own. Tension can build as people worry about losing their jobs or reputations. That's why it's important to communicate that the need for a consultant doesn't reflect a failure on anyone's part. Be honest about what the consultant can and can't accomplish without team members' help and focus on how your team can learn from this project.
7. **Provide feedback.** Consultants need feedback on their performance, so that they know what they're doing well and where they need to improve, just like other members of your team.
8. **Be vigilant.** The consultancy industry is all about winning contracts and delivering projects. But, at the same time, once a contract is won, you need to ensure that the consultancy firm is not taking advantage of the fact that you're now "signed and sealed," if it's not yet fully delivered on the promises that it made to you. This, of course, comes back to effective performance and delivery management.

More information on working with consultants/suppliers can be found here:

<https://www.mindtools.com/pages/article/working-with-consultants.htm>

Writing a Briefing Document for a Consultant

When you are appointing a consultant, it is vital that you prepare a project brief. While this has to contain enough information to allow bidders to estimate cost and time, care must be taken to avoid including information that may bias discussions and lead to the consultant telling you what you want to hear.

The brief therefore should include:

- A background to the organisation and the project
- The objectives of the project
- Expected deliverables:
 - This is a statement of the required results.
 - It may be quite specific and quantifiable, either in physical or financial terms. It may simply be the successful implementation of the objectives of the project.

- Strategic consultancy is sometimes harder to define in terms of deliverables, but a brief must be prepared.
- Project timetable. This should include any critical path dates where slippage on the project may adversely impact other activities.
- Reporting arrangements. i.e. is there an expectation that the consultant will report to the CE each week?
- The procedures or practices that must be complied with.
- Any conditions on the use of sub-contractors or associates.
- The form of contract or method of payment to be used. In this instance a fixed fee may be more appropriate, especially for a well-defined and short-term task. Staged payments may be appropriate on deliverables against objectives.