

CONSULTING SELECTION CHECKLIST

Selecting a consultant is a big decision with wide ranging implications. Today's economy dictates an agile approach to innovation and ideation, which may require exterior resources over time.

You deserve the best on-demand resources for your business – here's how to get it:

- Clearly define your project and how it helps you grow
- Confirm that you really need a consultant for your project
- Confirm your budget and timeline
- Identify three (3) consultants that have the necessary skill sets
- Request proposals that show their unique perspectives and how they will help you complete your project
- Request references and ask for work samples
- Select consultants focused on your needs, not their agenda
- Don't hire a consultant just because they used to work there, or they are related to someone – unless they are also great at what they do
- Pay attention to your prospect's communication – it won't get any better once you hire them, so be sure you select for timeliness and clarity
- Test the prospective consultants' ability to push back when needed and tell the truth when you may be wrong
- Be clear about expectations and outcomes – don't waste billable hours clearing up confusion
- Ensure final contract outlines scope of work, cost, and timeline in writing
- Remember, the relationship is yours to manage – own the communication, give feedback, and expect high quality

NOTES

Compare and contrast your top 3 consulting options

Bonus Tip: Remember, at some point you have to trust your judgement and make a choice. Don't become paralyzed by analysis.

Option 1:

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Option 2:

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Option 3:

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