

Checklist for Choosing the Right Consultant*

- ___1. Clearly define the project(s) for which you need outside help.
 - ✓Build Board and staff consensus on need to hire consultant.
 - ✓Determine internal decision makers and selection process.
 - ✓Out of many possible outcomes, what, specifically, do you want to achieve?
- ___2. Identify appropriate consultants to help you achieve your goals.

Sources include:

 - ✓Directories: ACN, for example, publishes an on-line directory by category.
 - ✓Referrals: both personal and professional sources.
 - ✓Advertisements: trade publications and/or internet search.
 - ✓Determine arena and level of expertise required; confirm budget available.
- ___3. Screen prospect pool to top candidates.
 - ✓Request basic information from all candidates, then select finalists to interview.
 - ✓At least two is productive; three is plenty; more than four begins to be counterproductive.
- ___4. Schedule face-to-face meetings with your top prospects.
 - ✓Allow at least one hour for each; anything less is not in your own best interest.
 - ✓Provide appropriate organizational information to each prospect prior to your meeting.
 - ✓List your criteria and key questions, then use consistently for each presentation.
- ___5. Make sure that the consultant's philosophy and mission are compatible.
 - ✓Agreement on values, vision and personal compatibility are essential.
- ___6. Request proposals from your top candidates.
 - ✓Ask them to specifically address what services they will provide, their cost and fees, a preliminary timeframe and the expected outcome.
 - ✓Are there organization-specific questions for which you need an answer as well?
- ___7. Frame cost considerations in terms of net gain.
 - ✓Experience shows that the lowest bid may not turn out to be the least expensive.
 - ✓Meeting your net objective is the ultimate goal.
- ___8. Check references provided by consultant finalists.
 - ✓Ask if former clients would hire the consultant again.
- ___9. Notify all candidates of your final decision in a timely manner.
- ___10. Request a detailed contract specifying:

✓Services	✓Termination Clauses
✓Schedule	✓Personnel
✓Fees and Reimbursed Expenses	✓Payment Terms
✓Location	