



## USING CONSULTANTS: A HOW-TO

Have you heard the one about the consultant? You must know a joke or a story about a consultant. Who doesn't? Some people have a mixed view of consultants' reputations. They may be seen as real experts, or just okay, or perhaps even pariahs by a few.

Let me confess that I know some consultants who should consider another line of work. There are more than a few individuals, now calling themselves consultants, who had long-term relationships with one employer. These people are often one-trick ponies with limited knowledge about different industries or other companies. Further, they have no idea what it takes to provide professional consulting support to an organization. They often act as if they have *the* answer to a business' issues. They exemplify that old adage *if all you have is a hammer, then everything looks like a nail*.

Another category of so-called consultant is the person, who got caught in a reduction-in-force, and is working with one specific goal: to find another employer. While no one faults individuals for supporting themselves, most of these folks have no idea what it takes to be a consultant. Further, they can be self-serving and intent on building a dependency in order to be hired.

The point of this initial discussion is to say that not all consultants are equal. There are ways to help ensure effective use of consultants in your organization... read on.

Making a summary dismissal of all consultants because of some poor quality ones flies in the face of today's realities. Most companies are operating lean. Here I'm referencing deliberate business decisions, and not the result of difficulties in recruiting and/or retaining quality people. These firms focus on the specific skills, the so-called core competencies that further their business purpose. They hire consultants for their expertise, to collaborate, to provide problem-solving support, and to augment their own resources.

For example, I recently met with an executive who said the business model for her group was to have a select team of employees with generalist skills, and another group (her *insourced/outsourced* group) who could provide specialized expertise. A small number of employees and a select cadre of consultants populated this latter category. She pre-screened and pre-selected the consultants, and considered them to be an integral part of her plan to deliver high quality services on a cost-effective, as-needed basis to her organization.

Quality consultants contribute value. There are at least three clear reasons for using them to support your needs and initiatives. First, they have specialized expertise that complements or supplements the talent you have on staff. Second, good consultants have considerable experience, from multiple sources, that is beyond your company. They can draw on that knowledge and bring a higher level of awareness, or a new set of ideas to bear on your current situation. Finally, and very importantly, the best consultants are objective, have an outsider's perspective, and focus on what seems best for your business. They have no internal allegiances, no political agendas, and can be appropriately forthright because their future does not depend on your

company.

Let me assume that you believe there are professional consultants. Your next questions may be: *How do I find them?* and *How do I work with them?*

How do you find quality consultants? In most instances the most helpful way to find someone of worth is to ask a source you respect for a referral. This is typically a colleague in your industry. But, you also can get excellent referrals from consultants you trust. These individuals will be delighted that you thought of them, and most of them have a resource network for just this purpose.

Recently, this occurrence happened to me. I received a call from an individual I've known for years who was looking for a particular type of expertise. While he wasn't certain if it was within my consulting focus, he had thought of me first. Clearly, I was happy to speak to him and I believe the call was useful to him on several levels. First, we caught up on business happenings, so it gave him an opportunity to clarify and articulate some key issues for him. Second, in asking me about my practice, he got a summary of some challenges other firms are grappling with in order to remain competitive and successful. Finally, while his requirements were outside my field, I was able to give a referral to a professional consultant who had exactly the skills needed and an excellent reputation as well.

Turning to the question of how to work with consultants, I have seven suggestions:

- Have cautious optimism
- Be direct
- Disclose constraints
- Don't play games
- Work collaboratively
- Set reasonable expectations
- Clearly define the engagement

- **Have Cautious Optimism.** If you are in the discussion stages with a consultant you have been referred to, it is understandable that you would have some vestiges of uncertainty. However, if you don't yet have trust, at least give the individual the benefit of the doubt. That is, have some level of cautious optimism about their values, and that the consultant is a professional, and wants to work with you to solve your organizational problem.
- **Be Direct.** Don't withhold important information. Be forthright about your needs, wishes and expectations. This level of honesty and straightforward discussion avoids most misunderstandings, mixed signals, disappointments, changes in scope, and unintended consequences.
- **Disclose Constraints.** Every company has constraints. They may be related to budgets, resources, availability, time, etc. Clearly communicate these internal restrictions and needs so the individual can best develop a plan of action to work with you. Don't put the consultant in the position of having to guess or interpret vague bits of information, those have the potential to complicate the work.
- **Don't Play Games.** Sometimes companies start with a consultant using the game of *Bring me a rock!* How does this work? You explain your situation to a consultant and ask for their professional opinion of how to proceed. When they provide you

with a proposal and a plan of action, you say some variation of *that's not what I want, try again*. (That is, it may be a nice rock, but it's not the one I want, and I'm not going to tell you what the right one looks like. So bring me another rock.) Instead work with the consultant at this important, initial stage. Respect their ideas, probe as much as needed for clarification, and provide good information and clear reactions. Don't simply lob the ball back for another serve.

- **Work Collaboratively.** There is enormous strength in the ideas, analysis and solutions for your business if you work as a team with a consultant. Collaboration has the potential for real win-win solutions. You learn from the consultant. They learn from you. They bring an external perspective, which you influence with knowledge of the nuances that make your company unique. Together you articulate what is, what will work, and modify ideas to match the business realities. With collaboration you arrive at better answers than either of you might derive alone. Truly, this is the power of synergy.
- **Set reasonable expectations.** Business problems can be resolved... sometimes with ease and efficiency... sometimes not. Make sure you know what can sensibly be achieved by using consulting expertise.
- **Clearly define the engagement.** No one likes surprises. One way to avoid them is by defining the scope, approach, schedule, staffing and cost *before* the project starts.

In summary, applying these how-tos can help ensure the consultants you choose add real value. And, that will surely lead to positive results for you and your company.

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**For further information, contact:**

**Floranne R. Reagan**  
**Vice President/Principal**  
**EXXEL, Inc.**  
**PO Box 891**  
**Natick, MA 01760**  
**frreagan@exxelinc.com**  
**508-651-3377**