

## How to hire and work with consultants

*Excerpted from **Succeeding with Consultants** by Barbara Kibbe and Fred Setterberg*

### INTERVIEWING CONSULTANTS

The interview process isn't mysterious. Essentially, you'll be conducting your interviews with prospective consultants in the same spirit and format that has successfully served you in the past to fill staff positions.

Nevertheless, there are some crucial differences. Given the broad impact that the consultant can have on your organization, you may want to assemble a more diverse interview team – including the executive director, senior staff, a board member, and other people whose working relationship with the consultant will have a direct impact on the success of the project.

You should interview at least two prospective consultants – even if you have already identified a probable candidate for the job. Talking in depth with consultants from different backgrounds who may have different approaches or techniques will help you refine your own understanding of your organizational dilemma, while simultaneously allowing you to compare the candidates' respective merits. During the interviews, make certain that you ask each candidate the same questions so that you can establish a fair standard for comparison.

As with most evaluative tasks, your ability to gauge the consultant's skills will be informed by your own degree of organizational self knowledge. In the best of all possible worlds, you would be able to define your group's problem, stipulate the background, expertise, and services you're seeking, and characterize the kind of relationship you want to cultivate with the consultant for a prescribed period of time. In reality, you may find that you need to hire a consultant initially to help articulate the problems you face. Indeed, this is inevitably the first step in solving them.

As you interview your candidates, pay attention not only to their answers – but also their personal manner and professional style.

#### GOOD LISTENING

Does the consultant pay attention to what you're saying and respond appropriately – or does he only talk about his own accomplishments?

#### PRACTICAL DISENGAGEMENT

Does it seem that this candidate will be able to provide the objectivity you need in an outside expert?

#### BROAD EXPERIENCE

Does your candidate have relevant experience to draw on in helping put your issues in perspective?

#### INSIDE INFORMATION

Does the consultant grasp your mission and organizational style? Has he bothered to learn anything about your group prior to the interview?

### **QUESTIONS TO ASK YOUR PROSPECTIVE CONSULTANT**

What strengths do you possess that will prove particularly helpful in connection with this project?

Have you worked on similar projects or consulted with other groups facing problems similar to ours? What did you learn from the experience? What would you do differently if you could repeat the experience?

How would you describe the challenges we face from the limited amount you now know about us?

Describe your work process. How would you work with our staff, board, and executive director?

Are there other members of your consulting team who would be working with you? Who are they? How would you propose to divide up the tasks among your team members? When can we interview them?

What problems do you anticipate as we begin to work together? How can we best address these problems early on?

Talk about the responsibilities we must assume in order to make our work together successful.

Are you available to complete this work during the time we've specified?

And finally: What else should we be asking you? What else should we know about you, your experience or about what it

would be like to work together?

## **CHECKING REFERENCES**

Checking your consultant's references is absolutely essential. It's the only way you can distinguish between an accomplished professional with a track record of genuine success and somebody who merely excels at interviews.

Ask your prospective consultant for a recent, complete client list. Pick from this list rather than the two or three names the consultant might otherwise give you. You should look for at least three organizations similar to yours – or groups that have worked with the consultant on problems related to the ones you now face.

In each case, call the person who supervised the consultant's work directly– in most cases, the executive director or a board member. Begin your talk with an open-ended question. For example: "We're thinking about hiring Joanne Expert to train our board in fundraising. I understand she did some similar work for you. How did that work out?"

In the best case, you'll have a brief conversation covering the nature of consultant's duties, her strengths, any problems that may have arisen during the collaboration, and the palpable results of the consultant's efforts. But, you might run into somebody who's reluctant to talk. Today many managers will not comment about the performance of their former employees – or consultants – because they fear a law suit if their negative recommendation results in a loss of work.

If you meet resistance, ask the reference to simply verify the basics: 1.) the kind of problem that the consultant addressed; 2.) her duties; and 3.) the duration of the work. Then prod gently with another question to gain more subjective insight, such as: "Would you hire this person again?" or "Would you recommend this consultant to a colleague?"

Whether the reference is forthcoming or reserved, you should pay attention to what's not being said. If the reference talks only about the consultant's punctuality, good attitude, and pleasing manner, be sure to ask if her intervention actually achieved the desired results. Ask as well if the job was accomplished at the negotiated price – or whether any troubling cost overruns occurred.

At some point, you may find it helpful to express your own theories. ("I have this sense that Joanne Expert may not be completely comfortable working with a large board. What was your experience?")

Finally, you should end with another open ended question that gives the reference one last chance to expand on their previous comments. "What else can you tell me about Joanne Expert?" or, "If you had it to do over again, are there any aspects of the project or of working with Joanne Expert that you would approach differently?"

## **CLIENT RESPONSIBILITIES IN THE CONSULTING PROCESS**

The consultant cannot take all the credit or blame for the outcome of your work together. As a client, you also have several important responsibilities.

#### HONESTY

Throughout the relationship, you must be consistently frank and forthcoming about the problems that face your organization. Though it may be difficult, you must put aside your embarrassment and fears – and tell your consultant the entire story.

#### FOLLOW-THROUGH

Over time, your staff and board will probably agree to undertake a number of tasks related to the consultant's intervention. Some tasks may be routine, such as attending meetings. Others, such as conducting research or writing reports, might prove demanding and time-consuming. Do not make these commitments unless you can keep them. Above all else, the consulting relationship is a collaboration. You must hold up your end.

#### COMMUNICATION

The arrival of a new consultant may spark fear, suspicion, and rumors – particularly if your organization is suffering through a period of acute turmoil and uncertainty. Determine early on how much and what kinds of information regarding the consultant's work needs to be shared with the key staff and board members.

#### LEARNING FROM THE EXPERIENCE

In some instances, the consultant may be able to teach new skills to the staff and board that they will use again in the future. If you can incorporate the consultant's best insights and techniques into your own organizational practice, you may be able to handle problems on your own next time around.

#### WILLINGNESS TO CHANGE

The consultant's work will often conclude with a recommendation for some variety of organizational change. Whatever its magnitude, only you can finally decide whether the prescription for change is justifiable and correct – and then summon up the energy, flexibility, and courage to take the necessary next steps.

#### ENDING THE UNPRODUCTIVE RELATIONSHIP

Sometimes the collaboration with the consultant simply does not work out. Perhaps you've hired the wrong person for the job. Maybe the consultant doesn't possess the right skills or experience. Whatever the reason, you have a responsibility to end the relationship as soon as you're convinced that it will fail. While firing somebody is never pleasant, this task shouldn't present any special difficulties. Consultants live and die by their reputations; they have everything to gain by making the termination as painless and private as possible.

**Excerpted from Succeeding with Consultants by Barbara Kibbe and Fred Setterberg.  
Copyright, The David and Lucile Packard Foundation.  
Pub. 1992, The Foundation Center.  
For ordering information, contact The Foundation Center.**

---

**Source URL:** <http://www.nyf.org/node/331>