Questions To Ask Before You Hire a Consultant

A complimentary guide to make your experience with us—or any consultant—a better, more productive one

In our 25 years of experience of working with prime contractors, customers, suppliers, partners, and third parties, we have found some fundamental principles that apply to all of these relationships. When we applied them in a timely manner, we were satisfied with the outcome. When we didn’t, we usually had to backtrack during the process to address unmet expectations.

We’ve found that when we are not satisfied with the outcome, or think the other party is not living up to the “promises” it made, it is usually a case of unmet expectations. Clearly, there are certain questions that should be asked before hiring a consultant. We have divided the items to consider into groups:

Questions to ask about our own organization before we talk with a consultant
Questions to ask about the potential project before talking with a consultant
Questions to ask about the consultant’s background information
Questions to ask about the consultant’s personal chemistry and fit
Questions to ask about the match and fit of the consultant’s firm
Questions to ask about the training and methodologies to be used
Questions to ask about the post evaluation process to be used
Questions to ask about the proposal
Questions to ask about the follow-through and follow-up

Print out this document and check off any items you feel you need to pay attention to for your upcoming project.

We hope this thought process becomes a useful tool to ensure even greater success with your next project. We would like to earn your trust as well as your business. Please consider using our services whenever appropriate. We look forward to hearing from you.
1. Questions to ask about our own organization before we talk with a consultant

- Are we willing to be objective about what the current circumstances are?
- Have we considered in what ways our management style and organizational culture will help or hurt this potential project?
- Can we be clear about how much effort our team is willing to expend? Do we agree that rarely can a consultant come in and hand in the answer without significant effort on our part? Have we determined that it will be worth it?
- Will we be objective about our choice of potential partners? Will it be a popularity contest or a results contest?
- Is there clear executive sponsorship and support for this project?
- Do we have internal champions for this project? Who are they?
- Do we need a “visionary” who can create specific project goals, objectives, team structures, and timelines or just someone who can manage the execution of a project that is already well defined?
- Who will be threatened by this project? Have we thought through a strategy to deal with the fallout?
- Are we asking someone on the outside to “own” the responsibility for the project or only lead/guide the process and escalate high-level issues to us?
- Can we be objective about what is probable, possible, and miracle status? Few companies can deliver on miracle status. Do we know why we are asking for it and the minimum acceptable outcomes?
2. Questions to ask about the potential project before talking with a consultant

- Are we clear in our mind about what we want and need? If there is a difference, did we agree on what we are looking for? Can we articulate it clearly?
- What fundamental causes (vs. symptoms) do we want to address with this effort? Have we differentiated between the two?
- Do we need a technical consultant or a process facilitator for this effort?
- Are we clear about the beginning and the end of the engagement? Do we know what to expect at each step in the project?
- What do we want our staff to be feeling, thinking, and doing differently when the consultant’s work is complete?
- The arrival of a new consultant may spark fear, suspicion, or rumors. Have we determined how much and what kinds of information we will need to share with the key staff members regarding the consultant’s work?
- Is the consultant expected to help rally support to make this project fly?
- Will the consultant doing the work be on or off our site?
- Do we care if any of the work will be subcontracted?
- Have we designed a one-page rating sheet to fill in as we interview each consultant to make it easier to make a decision after all the interviews have been conducted?
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3. Questions to ask about the consultant’s background information

- What was your professional experience before you became a consultant or facilitator?

- Are you a specialist or a generalist? What value or special skill set do you expect to bring to the table?

- What is your prior experience with clients of our company’s size? (Asking about the types of problems a consultant has dealt with can uncover a consultant’s level of business domain knowledge. This can avoid a significant number of billable hours spent on getting up to speed.)

- 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?

- Have you written anything, published or not, that deals with issues we face?

- Who are the people and companies with whom you’ve personally worked before? Can we call them to ask about your work?

- Are there other members of your firm 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?
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4. Questions to ask about the consultant’s personal chemistry and fit

- Do we believe this person’s demeanor and personal chemistry is right for our organization? Do we believe this consultant can create a positive relationship with our staff?

- Is the consultant pursuing innovative solutions to our problems? Does he/she ask creative questions about our project? As a result of the questions, has he/she provided us with information or insights we had not previously considered?

- What level of technology is the consultant or process facilitator using? No tech? Low tech? Some tech? High tech? Does that match our people’s expectations for this project?

- Is the consultant or process facilitator learner-centered, keeping their best interests in mind?

- What impact will this person have on our staff long after the engagement is over?

- Does the consultant appear to walk the talk? Does he practice what he preaches?

- Most consultants focus on two areas: cutting costs and raising revenues. What do they see as the relationship between the two functions? Is that the right answer for us?

- Did the consultant immediately conclude that he or she understands the business inside and out and has the “perfect solution” without knowing where our problems lie or what political issues we are dealing with?

- Does the consultant adhere to a published code of ethics that is consistent with our values?

- Will the consultant sign a letter of confidentiality? Is he/she free from associations and conflicts of interest that may have an effect on his or her advice and decisions?

- Do we believe that this person will stand on his or her convictions and deliver knowledge tactfully yet directly, whether it’s to be well received or not?

- What communication tools will be used to inform us of the project status? Is that acceptable to us?

- What is the consultant’s policy for returning phone calls or emails? Is that acceptable to us?

- How flexible is the consultant regarding last-minute emergencies and changes once on site?
5. Questions to ask about the match and fit of the consultant’s firm

- Many consulting firms focus on a specialty area. What do they see as their specialty? Is that the right answer for us?
- How many professionals work with them? Is the number and background adequate to meet our needs?
- How many clients do they typically work with at one time? Do they have enough time to devote to our company and help accomplish our goals?
- Do we know who will be doing the work for us?
- Is their style of getting work done and communicating progress and results compatible with ours?
- Does their firm publish a code of ethics that is consistent with our values?
- Did we ask what else should we know about them, including what it would be like to work together?
- Did we ask their references about their experience with the consultant, any problems they saw, whether or not they implemented the consultant’s recommendations (and if not, why not)?
- Did we attempt to gain subjective insight from references by asking whether or not they would hire the person again and whether or not they would recommend the consultant to a colleague?
- What does the Better Business Bureau say about their organization?
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6. Questions to ask about the training and methodologies to be used

❑ Does the consultant conduct research to find out what our audience wants and needs?
❑ Will the consultant customize his/her approach for us?
❑ Can the consultant manage the proper levels of content, engagement, and motivation to make our organization soar?
❑ Will the consultant spend extra time with our people on site?
❑ Does the consultant use an appropriate mixture of high-tech tools?
❑ Does the consultant have books, CDs, tools, and learning materials?
❑ Does the consultant use modern educational styles such as facilitation, interactive activities, and simulations to encourage feedback and interplay?
❑ Does the success of any proposed training or development heavily rely on creating “high impact” or “significant emotional events” for each participant in order to work? (If a participant doesn’t achieve that high impact, retention can be as low as 2% after 16 days)
❑ Does the success of any proposed training or development heavily rely on creating “Hmmm, I wonder if…” moments for the participants in order to work?
❑ Does the success of any proposed training or development rely heavily on “discovery” or “aha” moments by the participants in order to work?
❑ Does the success of any proposed training or development use spaced repetition for the participants to increase retention? (Long term retention levels up to 62% can be achieved)
❑ Does the proposed training or development use the advantage of tapping into participant’s multiple intelligences?
❑ Does the proposed training or development use the advantage of tapping into multiple learning styles?
7. Questions to ask about the post evaluation process to be used

- Will the post-evaluation process rely strictly on participants’ reactions? (Typically known as smile-sheet ratings or Kirkpatrick Level 1 evaluation)

- Will the post-evaluation process rely strictly on whether any learning took place? (Kirkpatrick Level 2 evaluations. Typically documented through pre- and post-testing)

- Will the post evaluation rely strictly on whether any behavioral change could be observed? (Kirkpatrick Level 3 evaluation)

- Will the post evaluation rely heavily on whether any actual results have changed or business goals been achieved? (Kirkpatrick Level 4 evaluation)
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8. Questions to ask about the proposal

- Does the proposal look like it was designed with our specific business objectives and situations in mind?
- Does the proposal adequately identify and convey an understanding of our current obstacles to getting the results we want?
- Does the proposal adequately tie the proposed solution(s) to our real issues and concerns?
- As a result of reading through the proposal, do we understand how the proposed solution is supposed to work in our organization?
- Do we know what resources are available for the project from the consultant and from our staff in order to complete this work during the time we’ve specified?
- Do we understand which responsibilities we must assume to make our work together successful, and do we accept them?
- As a result of reading through the proposal, do we believe the proposed solution is going to work in our organization and culture?
- Does the consultant or process facilitator’s fee match his/her level of experience and abilities? Is the firm competitively priced in the market?
- Do we know how the firm charges for services? How are billing procedures handled (hourly, flat fee, time and materials)?
- Does the consultant provide a written guarantee?
- Do their fees include travel time and other miscellaneous charges, or are those billed separately?
- Who will handle travel plans for the consultant or process facilitators? Do they fly coach or first class?
- Do we have a strong written contract including:
  - A list of deliverables
  - An expected project timeline
  - A payment schedule
  - Checkpoints at which we can evaluate programs
  - A bail-out clause
  - Name of person in our organization who has the authority to agree to expenditures or approve work
  - Agreement on reimbursable expense
  - A method for resolving disputes
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9. Questions to ask about the follow through and follow-up

- When and how will the consultant report to us on progress made?
- Does the firm intend to “come in and do it all” or will they work with our staff to train and educate them to become self-sufficient? How long will this take?
- What kind of documentation will be provided when the project is completed?
- Who will own that documentation?
- When will the final documentation be delivered?
- Have we insisted on receiving clear statements in the recommendations regarding any products or equipment needed? Will they provide a description of the needs and parameters any product or equipment should have (versus naming one specific brand or type)?
- While building our process plans, did we take into consideration that nothing is going to be perfect forever and create a way to deal with that?

We hope that this proves to be a valuable tool for you and your organization!