



“The consultant may offer a different analysis than yours.”

At its best, this is a transparent, educational, and relatively efficient process. Consultants understand that RFPs are competitive – many who submit proposals don’t get chosen. That’s the nature of the work. But in other situations – when the leadership has already made a decision – it’s an empty exercise that wastes a lot of time for all concerned.

If you already know who you want, start with that person. See if the scope of work, money, and timing are a good fit. Save the RFPs for another project.

## Consultants can create more work for you, not less

Consultants are change makers. If the consultant does all the heavy lifting, then the client won’t embrace change.

Here’s an example. When hired to assist with a strategic plan – which typically includes community interviews and surveys, a written assessment, and facilitating a board-staff retreat – a good consultant will make the client *write the plan*.

Why? Whoever writes the plan *owns* the plan.

If the consultant writes it, the strategic plan tends to sit on a shelf, lonely and ignored. When clients must wrestle all their great ideas into a document – including timelines, deliverables, and a budget – then they’re more invested in following through and actually doing the stuff outlined in the plan.

Yes, consultants *can* take work off your plate. However, the deeper the project, the more homework you, the client, should expect.

## Choose with care

When choosing a consultant, do all the obvious stuff diligently. Look at the consultant’s website. Check references. Request a written bid or scope of work. Ask a lot of questions.

In the end, it comes down to this: Are you excited to work with this consultant? Do you expect to be challenged in productive ways? Do you feel a sense of trust? Choose a consultant (or consulting firm) you really want to have a relationship with. Resumes are not relationships. And it’s all about the relationship. 

---

*Andy Robinson (trainyourboard.com) is a consultant to nonprofit organizations and the author of What Every Board Member Needs to Know, Do, and Avoid: A 1-Hour Guide (emersonandchurch.com).*

## Tips for Building a Good Relationship with Your Consultant

**If you can’t understand what consultants are saying, don’t hire them.** The consulting profession, like many others, is filled with jargon. Much of it is incomprehensible. A useful consultant helps you cut through the thicket, using clear, simple language. As you’re interviewing, pay attention to what consultants say and how much you understand. Someone who talks past you or over your head – even if they sound really, really smart – won’t be a good fit.

**Clarify communications.** Tell your consultant about your communication preferences – e-mail, texts, phone calls, etc. Identify multiple contacts within your organization who will engage with the consultant. That will open more communication channels and assure that more than one person is accountable.

**Define where the consultant’s work ends.** Sometimes consultants deliver training and then go home, leaving participants to implement what they’ve learned. But in many cases it’s important for a consultant to follow up and make sure that meaningful change has occurred. If you believe such follow-up is necessary, put that into the contract. Be rigorous, detailed, and clear.

**Negotiate the nagging.** With longer contracts that include multiple steps, who reminds whom of which deliverables? How do you prefer to be held accountable for your portion of the work? Be sure all this is spelled out.

**Expect hard truths** Good consultants are truth-tellers. They say what needs to be said, even if (especially if) it makes the client uncomfortable. So don’t be defensive. Listen carefully. This is what you’re paying for, so pay attention

## For More on Consultants (NonprofitWorld.org)

**Secrets to Finding the Perfect Consultant** (Vol. 28, No. 3)

**Outsourcing in the Nonprofit Sector: A Strategic Approach to the Challenges of Growth and Staffing** (Vol. 15, No. 5)

**In Search of the White Knight** (Vol. 17, No. 6)

**The Logic of Consultants’ Fees** (Vol. 10, No. 5)

**Common Mistakes in Hiring a Consultant and How to Avoid Them** (Vol. 30, No. 6)