

SOFTWARE IMPLEMENTATION GUIDES


Business Discovery Series

Working With a Consultant

What will a consultant do? How to select and work with one.

Different Types of Consultants.

Here we'll be focusing on two: business consultants and technology consultants.



Technology Consultants focus on reviewing digital solutions you have along with assessing how your business will benefit from other or additional digital products.

Business Consultants focus on company structure and processes. Their aim is to improve your processes to make them more efficient. They identify double handling of work and can also develop your business structure documentation.

Ideally, you'll work one person that is able to provide Business and Technology Consultancy. They'll bring expertise in both areas, saving you time and money.

Choosing a Consultant.

Identify the need by asking yourselves what you require.

List your requirements.

Ensure your own business infrastructure is documented as best it can be. See our Business Fitness Self-Assessment guide.

Start the search.

Ask people you trust for recommendations / search online. Look for testimonials and the background of each person for relevancy to you.

Conduct initial meetings to assess the fit.

Consultants should explain their expertise, how they work and what they will achieve, providing examples.

Come together as a team internally. **Shortlist** around **three**. You might skip this step, if one immediately stands out above the rest.

Assessment

Treat your assessment almost the same as you would for a permanent hire. You need the expertise, but you also need to be able to work them on a personal level.

Selection

Select the company or person you feel has the best balance between expertise and personality for your business/project.

Working with a Consultant.

Check for Insurance

It's important that your consultant has insurance that provides financial reassurance should any advice they give lead to loss or damage for you, or any third party impacted. Look out for:

Professional Indemnity, Public Liability, Product Liability

Business and Solution Discovery*

There will normally be an initial discovery meeting. Even if you think you've covered your requirements, they will want to properly understand them prior to proceeding.

This initial discovery is sometimes free but will depend on the individual and complexity / time involved to assess.

**You may be able to skip this step if requirements we're captured earlier in the process.*

Scope of Works and Price

Following the discovery meeting the consultant will sometimes provide a scope of works along with their quote. This will detail exactly what they plan to provide and how.

It's not always possible or practical to provide a scope. You may have asked for a troubleshooting day, where issues will be addressed during the session.

Working with a Consultant.

How Pricing Works

Most consultants charge a daily or hourly rate. Some are all inclusive, and others will claim for expenses for travel and hotel stays if applicable.

Be sure that you are aware of all the costs involved prior to starting.

Terms and Conditions

Review consultant terms and conditions. Be aware that many have cancellation policies where you may be charged if you don't provide enough notice of a change.

Timeline Expectations

Both parties should agree to the initial timescale proposed. It's not always possible to tell how long a project will take until you have started, so you should remain flexible.

Structure

Delivery structure will depend on the project. Heavy implementation support may mean multiple days per week. Whereas high level project management services may involve only a few hours per week.

Project Progression and Completion

Openly discuss progress with your consultant and ask for their advice on the next steps at each stage. It's up to you as much as them to ensure that the project momentum continues, and the team stays on track.

Additional Considerations.

Consultant as Supplier

You demand a high quality of service from your suppliers for other products and services. Consultancy is no different, ensure you're always getting the best from your consultant.

Consultant as Partner

Trust your consultant as you would a business partner. You'll likely need to share information that would normally be confidential to achieve positive results.

Consider a Non-Disclosure Agreement (NDA)

If you don't feel comfortable sharing information, then you could ask your consultant to sign an NDA. They may already have an NDA template if you don't have one. Or there are resources online to create one.

Pay on Time

Consultants are often self-employed, working from one income stream. Getting paid on time is even more vital for them than it would be for an ordinary business.

You made it to the end, I'm not surprised, what a great document, eh!

In summary, select a consultant you feel comfortable spending a lot of time with and ensure that you've considered all the points in the document when working with your consultant.

I hope you found it helpful.

Also, if you don't think you can do all this stuff on your own, but need to, I can help you through it, here are my details if you would like to get in touch:

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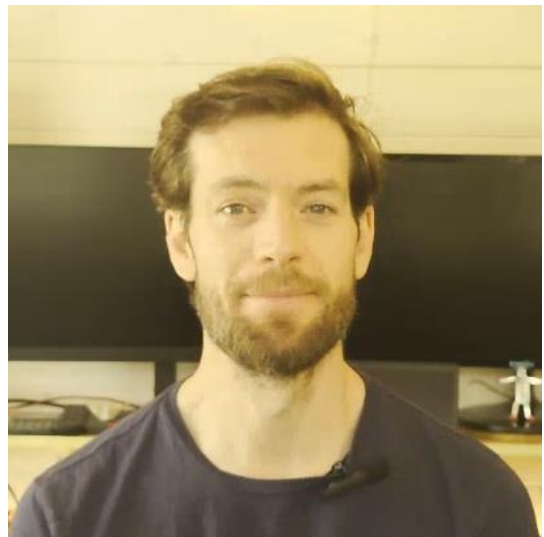
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Thanks for reading,

Dan



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