

# Choosing the Right Consultant

Selecting a consultant is an important decision. Choosing well can reduce risk and increase results. We've found that determining whom to hire comes down to three essential areas:

1

The consultant qualifications

2

The proposed approach

3

The budget

There are other value-added criteria to consider after you address the essentials. Your selection criteria flow directly from your project scope. Below, we provide additional detail on applicable standards and factors we encourage our clients to consider as they evaluate consultants. We recommend choosing only those criteria that are most relevant, knowing they could change depending on the project scope.

## Consultant qualifications:

- » **Domain area expertise:** Evidence that the consultant has worked on similar projects previously; How is the consultant's work on those projects directly relevant to the work required on your project?
- » **Consulting experience:** How extensive is the consultant's experience with similar projects and or like organizations? If not, what evidence suggests the consultant can be successful in advising your organization?
- » **Other project-relevant competencies:** How does the consultant demonstrate other competencies critical to the success of the project (e.g., strong project management skills, written communication skills, existing networks/relationships.)?
- » **Bandwidth:** What is the consultant's capacity to engage in the proposed scope? How much time are they willing to dedicate to your project? What else do they have going on right now? Can they work within your deadlines and time constraints?

## Proposed Approach:

- » **Structure:** Does the proposal include all the information you requested?
- » **Content:** Does the proposal present the right combination of vision and detail? Are the specific activities, deliverables, and timeline aligned with your expectations, and do they seem feasible? Does the proposal include any new ideas that you hadn't considered before?
- » **Presentation:** Has the consultant clearly and compellingly described how they will accomplish the work set out in the project? Do the writing and the overall presentation reflect the consultant's comfort and expertise in the project area?

## Budget:

- » **Price:** Is the budget within your desired range? How does it compare to budgets proposed by other consultants? If a proposed scope is more expensive than another, what additional value or results will the investment produce? Has the consultant provided sufficient detail on how the budget was prepared? Are all significant incidental expenses (e.g., travel) accounted for?
- » **Structure:** Is the proposed budget structure (fixed price or hourly) aligned to your requirements?

## Other criteria:

This category of odds-and-ends captures other measures that, depending on the specific project, might be helpful for you to consider:

- » **Location:** More relevant for projects where significant in-person work is required.
- » **Prior experience with your organization:** Relevant in cases where having organization context and previous relationships within the organization is essential to the success of the project.
- » **Brand:** This measure may be relevant in certain kinds of high-profile projects where the involvement of a high-profile consultant or consulting firm can add to the credibility of the project.
- » **Cultural fit:** Relevant in projects where the consultant needs to engage deeply with the team.
- » **Alignment with other organizational goals and values:** Examples might include mission alignment, increasing diversity, or promoting your mission work, understanding of the community.