

Selecting a Research Consultant to Fit Your Organization's Needs

Factors To Consider At Each Stage of the Client/Consultant Engagement

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Factor 1: Why Do You Need a Consultant?

- Clearly define your problem or informational need.
- Develop a written problem definition
- What services will the consultant provide? (Scope of Work)
 - Expertise that you do not possess in-house?
 - Manpower, technology, and/or facilities needed for a special project?
- If the answer to the above question is “expertise”, consider the pros and cons of increasing in-house expertise through training or hiring versus using a consultant.
- The scope of work for a consultant should be a key consideration
 - you may not need to hire a full-service consultant firm if all you need is a field service.

Factor 2: What Are Your Options?

- Get help where you can – you may be able to find the expertise or manpower you need without hiring traditional consultants:
 - Contact professors at local universities. Departments with the research expertise you need might include Marketing, Management, Psychology, Political Science, and others.
 - Often university faculty are available to do outside consulting or they can provide graduate students.
 - Some universities have outreach units that provide consulting services to business and government.
 - When deciding whether or not to contract with university faculty, graduate students, or consulting units, make certain that university schedules (i.e. the beginning or end of a semester) will not interfere with the timing of your project.

Factor 2: What Are Your Options?

- Consider hiring one or more contract employees with the expertise you need.
- Once again, local colleges and universities are excellent source of referrals for students with advanced degrees who recently graduated and may be interested in temporary assignments.

Factor 3: Start Your Search for a Firm By Collecting Information from Multiple Sources

- If you have decided that a consulting firm is what you need, start your search with word-of-mouth referrals:
 - Within your own organization (firms you have worked with; firms that others in the organization have contracted in the past)
 - Contact people in your industry whose opinions you trust.
 - Request referrals from industry associations.
- Search the Internet:
 - Websites such as Quirks.com offer listings of research consultants with brief descriptions of their services and links to their websites.
 - On consultant websites, look for specific information indicating that they have the experience and expertise that you require.
 - Look for links to conference presentations or publications in peer reviewed journals. While it is not necessary for a skilled consultant to be published, presentations and publications help to confirm the consultant's credibility as an expert.

Factor 4: Provide Clear Project Specifications When Requesting Proposals or Presentations

- Develop a clear, written project description that will take the guesswork out of proposal preparation for the consultant.
- If you want a consultant to recommend one or more methodologies in the proposal, then clearly request this.
- Requests for proposals should require consultants to provide:
 - A detailed description of how work would be performed
 - A cost and timing (and a list of assumptions that these are based upon). Timing should include a statement indicating when the consultant would be available to start work on the project.
 - Examples of similar work performed in the past
 - References from clients that received services similar to those you are requesting
 - Names and bio's of key personnel who will be assigned to the project.

Factor 5: Develop A Short List

- Have a committee of individuals from your organization review proposals to identify 3 or 4 firms that will receive further consideration:
 - Did the consulting firm follow all RFP directions?
 - Does the consultant clearly have the relevant experience?
 - Does the proposed methodology fit your project specifications?
 - Do the cost and timing seem reasonable?
 - Do the references fit the type of work you are requesting?
 - Did the references check out? (Call references for firms that you are interested in inviting to a presentation.)
 - Take a close look at the expertise and experience of the key personnel who will be assigned to the project.

Factor 6: Consider a Variety of Characteristics at the Consultant Presentation

- Once you have developed a short list, invite the finalists to a presentation and/or a meeting where you will have an opportunity to ask questions and meet key project personnel.
- Teleconference/webinar meetings are sometimes necessary, but in-person presentations are best. If you will be hiring a consultant for a long-term project, then a face to face meeting is important.
- The individual(s) giving the presentation and/or answer questions should be the same persons who will be doing most of the work on your project. Oftentimes consultants will send senior partners to proposal presentations and then assign newer, less experienced employees to do the work. There should be at least one senior-level consultant working on your project.

Factor 6: Consider a Variety of Characteristics at the Consultant Presentation

- In addition to the consultant's track record, also consider the consultant's fit with your organization:
 - Does the consultant appear to understand your industry and the culture of your organization?
 - Is there good chemistry between the consultants and you/your staff?
 - Do both of you speak the same language?
 - Do project personnel demonstrate strong communication skills?
 - Does the consultant demonstrate the flexibility you need? (For example, if you need project personnel available for weekend meetings, are they available?)

Summary

- Clearly define why you need a consultant.
- Consider a variety of options in addition to traditional consulting firms.
- Start your search for a firm by collecting information from multiple sources.
- Provide clear project specifications when requesting proposals or presentations.
- Work with a committee to develop a short list of firms. Consider experience, expertise, proposed methodology, references, cost, and timing, and project personnel.
- Consider a variety of characteristics when meeting consultants in person. Considerations should include organizational fit and communication skills.