

# 9 Essentials for Choosing a Consultant

How to select a consultant who is right for you and your business



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# The right consultant can create tremendous value:

When selecting a consultant buyers of consulting services are looking first for the right set of team expertise, skills and industry knowledge. A good consultant should have experience with the challenges or opportunities your company is facing. For any consultant to be successful in helping your company, though, the consulting firm's approaches, methodologies and provided roles have to fit with the your project requirements and needs.

That's why searching for the right consultant always starts with a clear picture of your own organization's situation and plans.

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### Market challenges:

- ✓ The management consulting industry is highly fragmented with a variety of consulting firms, ranging from the “big three” global strategy-consulting firms to a large number of individual/independent consultants. Apart from the differences in size and scale, there exists a wide variety in the positioning and differentiation of the various consulting firms. There are firms that focus on a variety of issues in the same market such as the strategy-consulting firms, as there are firms that focus on a specific domain, such as information technology (IT).

### Client challenges:

- ✓ The good thing is: There are many choices for buyers of consulting services. The bad thing: The differentiation among consulting firms is so minimal. For buyers of management consulting services the answer is clear. Better expertise or specialization is the top deciding factor. To be able to find the right consultant, clients must have a clear picture what they want and need. This is not always easy to define at the outset of a project, also since sometimes there is no internal consensus about project goals and project approaches.
- ✓ Buyers of consulting services often do not know how potential consulting firms can help them with their needs. It's difficult for them to figure out who is good in what and who is right for their business and challenges.

# 1

## Project set up: What do I want to change and improve?

Describe your organization's situation (why do you want to initiate the project?), the challenges or problems you want to solve as well as quantitative and qualitative project goals you want to achieve after having executed the project.



What is the problem/ the challenge which needs to be solved? What are the indications that something is amiss?



What are basic reasons behind the problem or issue?



What are the consequences should the problem or the challenge not be overcome?



What are the signs and indications if the problem or challenge is overcome?

# 2

## Project set up: What are necessary steps to achieve the project goals?

Define actions and activities which are necessary to achieve the project goals (how do you want to proceed?), and the results which you expect from completing these actions and activities.



Do you already know the solution to your problem or how a solution might be achieved (the project approach)?



What steps are necessary to achieve the project's objectives?



What results do you want to achieve at the end of the project, what should be different compared to the as-is situation of today?



Are there any concrete potentials of improvement you want to tackle?

# 3

## Project set up: How do I plan the project's timeline and resources?

Make a thorough outline of your project in terms of time, scope, challenges/ barriers and resources, develop a (rough) project plan and define necessary resource allocations.



When should the project start and when do you plan the major results to be delivered?



Which phases and project milestones can already be defined?



Who's involved in the project? How do I staff the internal project team?



Which qualifications and capabilities do the involved individuals have to bring to the project?

# 4

## Project set up: What do I expect the consultant to bring to the table?

Make a thorough outline of all of the skills, resources and information needed to complete the task (role of the consultant, expertise of the consultant, consultants' references, consultants' services).



What knowledge should the consultants possess?  
What methodological know-how is necessary?



What expertise and experience should the consultants bring?



What assistance is required (e.g. coaching, expert advise, body leasing)?



Which tasks and responsibilities will the consultants assume?  
Which tasks will or can be done internally?

# 5

## Search & Evaluation: Which consultants are right to be considered?

Define your list of consultants for initial consideration (long list) which may be able to solve your problem.



On [consultingsearcher.com](https://consultingsearcher.com) you can find first-class consulting firms for your specific projects. A professional, well-structured overview of consulting firms' areas of expertise and a simple user interface allow you to quickly find the right consulting firm based on your request.



Would you like Cardea to find and recommend the appropriate consulting firms for your requirements? We have access to more than 1'000 consulting firms and are able to name you suitable consultants for your long list.

# 6

## Search & Evaluation: How to inform potential consultants?

Provide all consultants which you want to invite to submit a proposal with all relevant information about your project initiative (challenge, goals, tasks, time plan, etc.) in a well-structured request for proposal document.



What do consultants have to know about your project, so they are able to submit a tailored proposal?



Are there any conditions or characteristics of your organization which the consultants have to consider?



Are there any project work and/ or project documents which the consultants can draw on?



How is your internal project team staffed? Which individuals are involved in the project?

# 7

## Search & Evaluation: How to evaluate consulting firms?

Consultants vary greatly in their level of expertise. That's why it is important to assess the expertise and quality of a consulting firm. Look for team expertise, skills, industry know-how, track record, approach and methodologies, all of them have to be a perfect fit to your business and project.

-  Do the consultants provide the right services to addressing your challenges? Is the project approach tailored to your needs?
-  What is the consultant's special area of expertise? What is the consultant's knowledge of the industry?
-  What is the consultant's "track record"? Does the consultant's expertise match with what you want the consultant to do?
-  To what extent do consultants do what they say they will? Are they following through on their promises?

# 8

## Search & Evaluation: How to make the right decision

Choose the right people, not the right firm. Although a consulting firm's brand may be an important factor, brand is not a proxy for quality. Clients have to make their final selection based on the individuals they meet. Choosing between shortlisted consulting firms is now as likely to be based on one-to-one interviews as it is on traditional "beauty contest" presentations.



Which individuals of the consulting team put forward for your project would you like to meet?



What do you want to learn about the consultants? Which additional questions should be clarified in the presentations?



What evidence do you need that the consultants are truly able to make a difference?



Which criteria are important to you to assessing the personal presentations of the shortlisted consultants?

# 9

## Search & Evaluation: How to choose the most suitable consultant

The perfect fit: which consultant is the best? The criteria for selection will be based on what is needed, what matches best: the experience and skills possessed by the consultants, the mechanics of the proposals (the consultant's role, approach, costs, etc.) and the client/consultant interaction.



Which consultant does ultimately and fully meet your requirements?  
Which consultant are you most confident about?



With which consultant have you experienced the best client/  
consultant interaction?



Which consultant is right for your business and your employees  
which are involved in the project?



Are there any things which you have to compromise for and which  
do not bear fundamentals risks?

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Founding Partner and  
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For more than a decade, he knows the challenges in the consulting world in national and international markets and is familiar with the requirements of quality standards.



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# Search & Evaluation of Consultants

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