

# How to Choose the Perfect Consultant

## Checklist

1. Make sure your consultant has the qualities that are important to you and your company. Look for the following qualities.

- \_\_\_\_\_ Client Service
- \_\_\_\_\_ Integrity
- \_\_\_\_\_ Professionalism
- \_\_\_\_\_ Respect
- \_\_\_\_\_ Trust

2. Ask the consultant what results you can expect. Your goal is to both make money and save money.

- \_\_\_\_\_ increase profitability
- \_\_\_\_\_ decrease costs
- \_\_\_\_\_ increase productivity

3. Make sure the consultant has the relevant experience and expertise. Ask them to explain their background and give you examples of their successes and failures.

- \_\_\_\_\_ education, training and skills
- \_\_\_\_\_ industry or service type experience
- \_\_\_\_\_ years of experience

4. Get to know each other and make sure the consultant understands the unique problems of your business.

- \_\_\_\_\_ high level of understanding
- \_\_\_\_\_ medium level of understanding
- \_\_\_\_\_ low level of understanding

5. Ask the consultant about the total cost of the project. Decide if the total cost is within your company's budget and makes sense based on the expected results.

- \_\_\_\_\_ cost is lower than budget
- \_\_\_\_\_ cost is within budget
- \_\_\_\_\_ cost exceeds budget

6. Based on your checklist criteria above rate the consultant overall on your level of comfort and your “gut instinct”.

- Perfect match. This consultant understands me and my business, has the right experience, quickly understands my problems and has helped similar clients.
- Good match. I feel comfortable with this consultant, I believe in their ability to uncover our problems and provide solutions.
- Average match. This consultant has the knowledge and experience to provide some results to improve our business.
- Poor match. This consultant doesn't seem to understand my business or our unique needs. I don't relate well to this consultant
- No match. My “gut” is telling me this will never work. I would be wasting both time and money to work with this person.