

Central IN Professional Development Conference

Working with Consultants

Agenda

- General Comments
- Common Mistakes
- Primary Reasons
- Selection Criteria
- Maximize Utilization
- Measuring Success
- Q & A

General Comments

- What mistakes do organization's make using consultants?
- What are primary reasons to consider using consultants?
- What criteria should I use to select consultants?
- How can I get the most of consultants?
- How do I measure if working with consultants is successful?

What mistakes are made

- Organization does not know what it needs
- Problems are more significant from procrastination
- Level of authority is not determined
- Management and/or Consulting Services
- Expecting a donation for services
- Communication Problems
- Project Management is insufficient
- Budget is not realistic
- Micro management
- Using consulting is a sign of weakness

What are reasons to use consultants?

- Reduced and controlled operating costs
- Leverage limited resources
- Free up staff for other purposes & increased responsiveness
- Difficult to manage current situation and out of control
- Resources and expertise is not available or affordable internally
- Improved cash flow for better payment terms from vendor
- Ability to spread risks to consultants
- Project management and service delivery managed by others
- Should encourage organizational improvements

What Criteria should I use to select?

- What other client experiences exist?
- What reputation does consultant have?
- How many similar references and situations?
- What additional products and services are provided?
- Does consultant have projects that are short or long term?
- How well do the two cultures match?
- What capacity does consulting firm add to organization?
- How easy is it to work with consulting firm?

Getting the most out of consultants?

- Include them as part of organizational team
- Challenge them to provide additional services when needed
- Regular communication including appreciation for efforts
- Pay consulting firm timely and explain payment delays
- Include consulting firm in board and committee discussions to maximize return on investment
- Help consultant to be more efficient with service delivery and use the information that is provided

How do I measure if consulting relationship is successful?

- Ongoing communication and project management
- Board and management involvement in relationship
- Organization is more efficient and is better at service delivery
- Organization sees consulting firm as an important contributor to its management team
- Contributes towards reducing staff turnover and continuity.
- Overall costs including opportunity costs is less and resources are better leveraged
- Consulting firm reinforces and supports your priorities

Q&A

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