7 Common **Mistakes to Avoid when Engaging a Consultant**

Prepared by aCE talentNET

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Introduction

aCE talentNET works with large organisations such as ANZ Bank, Aviva Group, Commonwealth Bank, Omni Asia Pacific, AMP, Fosters Australia, Ansto, Department of Human Services and ExxonMobil.

aCE talentNET supports large organisations undertaking organisational development projects in Learning and Development, Training and Facilitation, Change Management, Performance Management, Capability Development, Human Resources, HR and L&D Outsourcing, eLearning, Instructional Design and many more.

Typical examples of the types of projects aCE talentNET consultants have been involved with include:

- Project specific expertise; i.e. Organisational Development, Learning and Development Strategic consulting, Change Management consulting, Regulatory consulting (e.g. Financial Services Reform Act)
- Supply of proprietary tools and methodologies in the design and implementation of projects; i.e. emotional intelligence, development of online learning materials
- Extra ‘hands’ to ensure project timelines and objectives can be met; i.e. sourcing national facilitation teams for major training implementations.

While the engagement of consultants is essential to the success of organisational wide projects, most organisations tend to commit a number of common mistakes when engaging external consultants.

From our more than 10 years of experiences as Organisational Development Consultants and Brokers, we have identified seven (7) common mistakes that organisations make in engaging consultants to deliver organisational project initiatives. No matter what your project, if you understand and avoid the following mistakes, you will be assured of success with your consultant delivered project outcomes.

So here goes....

engaging Talent to drive organisational development results for business

aCE talentNET Pty Ltd, 126 Fordham Ave, Camberwell VIC 3124
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1. Failure to Define

Failure to define the scope of the project and deliverables at the outset sets the project up for failure from Day 1. Even if the project is still in its infancy, it is essential that the scope, objectives, parameters and outcomes of the project be defined.

If necessary, engage the consultant as part of a phased approach.

For example:

**Phase 1:** Define project objectives, scope, stakeholders, terms of reference, outcomes, deliverables, budget, timelines etc. This can usually be done within 1-2 weeks.

**Phase 2:** Implement and deliver project.

Refer to Appendix 1 for key factors to consider when defining Project Scope and Consultant Brief document.

By clearly documenting the project/role scope there is no confusion if the often common issue of ‘scope creep’ comes up. When projects, roles and deliverables are clearly defined this ensures that all parties are working towards the same objectives. If scope creep becomes an issue then the initial ‘Project Scope’ document is a great place to start to clarify roles and responsibilities.
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2. Failure to Select

Failure to select the right consultant can be the result of many factors, for example:

- Lack of clearly articulated project scope and brief
- Not matching consultant capabilities with those required of the project
- Lack of time to conduct a thorough selection process (including short-listing, screening, interviewing, reference checking etc.)
- Preference to appoint low cost consultants
- Failure to fully check consultant references, referees and track record
- Failure to clearly document project parameters in a contract.

Often the difference in paying an additional $3-500 per day more can be the difference between engaging an average consultant and an outstanding one.

By all means use your existing network of consultants to approach with opportunities, but do not be afraid to go to a broader range of suppliers and delegate the responsibility for short-listing suitable candidates. Many clients fall into the trap of engaging consultants they have used before or consultants referred by colleagues or (dare we say it) friends. Often these consultants do not have the skills to deliver all aspects of the project and therefore, their appointment is counter-productive and a waste of valuable funds.

To ensure this doesn’t happen, take 30 minutes to document the desired types of skills, capabilities, experience, qualifications and background to undertake the project.

Give careful consideration to the personality and cultural aspects of the consultant, as these factors are critical to finding, selecting and appointing the right consultant, and thus achieving project outcomes in the most effective way possible.

Refer to Appendix 1 for a template to assist with avoiding Common Mistake Number 1 and 2 – Project Scope and Consultant Brief Template.
### 3. Failure to Induct

Unfortunately, the sad fact is that failure to invest a few hours inducting a consultant into the organisation, department and project can set the consultant up for failure from the word ‘go’. It is essential that the consultant gain as much knowledge about the organisation etc. and project as soon as possible to ensure they are effective in achieving the project deliverables.

Here are a few tips for an effective consultant induction:

**A. Meet with consultant on Day 1 to achieve the following:**

- Build rapport
- Clarify project scope and deliverables
- Confirm consultant key performance indicators/project deliverables and milestones/timelines
- Confirm contract terms, e.g. duration, rates, hours, compliance issues (e.g. OHS etc.), administrative (e.g. PC, workspace, workplace flexibility i.e. working from home etc.)
- Confirm expectations, reporting lines and autonomy
- Agree on methods and regularity of communication and updates
- Identify a ‘buddy’ for the consultant to ensure administrative issues are managed at the right level (i.e. not by project leaders)
- Establish protocols for monitoring project scope creep; this often happens within a project and building in processes to manage this is essential.

**B. Introduce consultant to project team members and key stakeholders**

**C. Send communication to key stakeholders confirming appointment of consultant, briefly outline consultant background and capability, their assignment and seek stakeholders’ assistance in working with consultant to deliver project objectives.** If pushed for time, delegate drafting of this communication to the consultant as their first task of the project.
4. Failure to Communicate

Clients have every right to expect that a good consultant will hit the ground running and very quickly become a productive and effective member of the project team (particularly if Mistake 3 is avoided!).

However, this does not mean that consultants do not require the same level of communication and updating that regular team members and full-time employees warrant. Treat consultants as you yourself would want to be treated and you will be more than halfway there in avoiding this common mistake.

The more communication a consultant receives the more effective they will be in delivering project objectives. Make time to meet with the consultant, at least on a weekly basis, and set a firm agenda and timeframes for what needs to be discussed. This does not have to be a long meeting, say 20 minutes, but it does need to be regular. Also provide the consultant with a means of getting in touch with you (or key stakeholders) in the event something urgent needs to be discussed. Many a project has failed due to the lack of communication between project sponsors, leaders and members!
5. Failure to Delegate

Assuming the right consultant has been selected, they will be able to provide valuable assistance, insight, research, methodologies, innovative ideas and share experiences relevant to the project. One of the most common mistakes made by clients is failure to capitalise on this experience!

Clients must think outside the square in terms of viewing the consultant’s role, and tap into what is often a vast number of experiences gained over their consulting career. Failure to tap into this knowledge is not smart particularly when it is available.

Consultants often report that the role they were contracted to fulfill was diluted to a point where clients could often have on boarded lower paid resources to complete instead. Clients must ‘delegate, delegate, delegate’ wherever possible and use the capabilities and knowledge of the consultants to maximum effect.*

* There is of course a fine line between maximising the skill set of the consultant and major project scope creep, so care is required when expanding the deliverables/KPIs of the consultant (see Common Mistake Number 1).
6. Failure to Trust

This is linked with Common Mistake Number 5. Failure to trust a consultant to do their job often results in ineffective use of the consultant’s skills, experience and knowledge.

There is no mistaking the challenge and time involved in developing trust in a consultant. However it is strongly recommended that once clients have provided solid direction regarding expectations, tools, preferred layouts, methodologies, objectives, timelines and deliverables, that they have a loose reign on the consultant from the outset to allow them to showcase the quality of their work.

Failure to trust in the consultant’s skills, experience and abilities can again, minimise the effectiveness and value the consultant can provide to the project.

By undertaking the following, you will be able to provide the right environment in which to quickly build a sound level of trust with your consultant:

- Set clear boundaries
- Set clear guidelines re: project scope
- Be clear about communicating organisational/departmental values
- Articulate any necessary political issues for careful management
- Provide a supportive and communicative environment.

Notes
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7. Failure to Review

As with all projects it is essential to regularly review progress. So it follows that it is important to regularly review the consultant’s progress with the project. Alas, this is often a common mistake made by clients.

The objective of regular review is twofold:

1. Review Project progress including:
   - Deliverables
   - Milestones
   - Timelines
   - Budget.

2. Give consultant feedback on such issues as:
   - Quality of work
   - Contribution
   - Teamwork
   - Communication
   - Areas for improvement
   - And if you are brave, get the consultant to give you feedback!
Summary

By employing each of the seven key steps, i.e. Define, Select, Induct, Communicate, Delegate, Trust and Review you will avoid the common mistakes often made when engaging a consultant. By avoiding these 7 mistakes you will:

- Ensure the role of the consultant is clearly defined
- Monitor the progress of the consultant towards defined project deliverables
- Have confidence in your consultant to deliver on project milestones and deliverables
- Ensure the consultant adds as much value as possible to both the immediate role and wider departmental team
- Utilise, to the fullest extent the skills, knowledge and experiences of the consultant
- Deliver the project on time and within budget.

About aCE talentNET

At aCE talentNET, we are an established organisational development consultancy and broker working with clients to ensure their success. If you are serious about getting the right consultant for your business and/or project and lack the time and resources to do so, then do the right thing and call us NOW!

With an established network and access to proven and experienced talent, you can use our expertise in sourcing, selecting and appointing consultants and contractors for short, medium and long term assignments. This ensures we will provide you with the highest level of support to get the right people working on your important business initiatives. Solving your resourcing issues is in your hands!

Contact Executive Director – Consulting to arrange a consultation:
aCE talentNET Pty Ltd
t: +61 3 8503 7598
e: consult@acetalentnet.com.au
w: www.acetalentnet.com.au

We will be happy to discuss and implement a ‘no-cost-to-you’ strategy to source the right resources for your team. Don’t waste another second of your valuable time on consultant and contractor selection issues!
### Project Scope and Consultant Brief Template

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<tr>
<th>Project Description</th>
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<th>Project Role</th>
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<tr>
<th>Project Deliverables</th>
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<th>Project Critical Milestones</th>
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<tr>
<th>Consultant Skills Required</th>
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<tr>
<th>Consultant Industry Experience</th>
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<thead>
<tr>
<th>Consultant Profile (i.e. personality, style, experience, etc.)</th>
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<th>Culture of Organisation and Operating Style of Project Leader</th>
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<tr>
<th>Technical Skills Required (e.g. IT, project management methodologies, accreditations, qualifications etc.)</th>
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### Project Scope and Consultant Brief Template – cont’d

<table>
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<th>Project Sponsor</th>
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<tr>
<td>Location</td>
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<td>Days of work</td>
<td>(i.e. shifts, weekends)</td>
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<td>Start Date</td>
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<td>Anticipated Length of Project</td>
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<td>Rate/Payment</td>
<td>(i.e. hourly, daily)</td>
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<td>GST Inclusive/Exclusive</td>
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<td>Expenses and Allowances (Additional)</td>
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<td>Travel Required</td>
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<tr>
<td>Special Requirements</td>
<td>(e.g. weekend work, drivers licence, own car)</td>
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Send to Executive Director – Consulting, aCE talentNET (consult@acetalentnet.com.au) for immediate support in sourcing the perfect consultant for your project.