

Guide to Consulting Services

ASSOCIATIONS

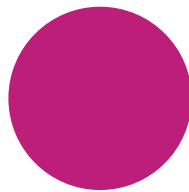
now

Find Your Way

Feeling lost in the face of a major project?
It may be time to consider a consultant to point you in the right direction. 8

Successful teamwork 5 | Contract do's and don'ts 6 | Tips from CEOs 11

Consulting Services
Directory p. 12



Make a Good Match

When your association is in the market for consulting services, you need someone who understands your organization and brings the best expertise to your project. You'll find the right partner if you investigate candidates thoroughly, communicate with them clearly, and tap the experience of colleagues in the association community.

By Kim Fernandez

For an association executive with a major initiative on the horizon, the thought of hiring a consultant can be both exciting and terrifying. The excitement comes from the opportunity to work with an expert on what is likely to be a daunting project, anything from launching a magazine to drafting a new strategic plan to hosting a major conference. The fear stems from the risk involved: Will you hire the right consultant—one who fits your association's needs and personality and can produce the results you seek?

Association executives who have been down this path before say you can ensure you've made a good match with an outside contractor if you ask the right questions and carefully examine the candidates' qualifications and backgrounds. Your potential partners will be vetting you, too; it makes no sense for them to spend their time competing for jobs that aren't the right match for their skills or experience.

"There is no question that word of mouth is the best way to get good consultants," says Patricia Blake, CAE, executive director at the American Society for Gastrointestinal Endoscopy. "I talk to my staff and encourage them to get out and network with other people in the profession. It's critical that we talk with our colleagues. When people advertise, they can say whatever they want to say."

Mary Pat Paris, executive director of International Registration Plan, Inc. (IRP), a trucking industry organization, agrees. "I go to a key person in every one of our jurisdictions and ask for their recommendations," she says.

Consultants themselves offer the same advice. "Referrals from people you trust are always the best way to go," says Tom Pierce, MBA, president of Pierce Management Development and chair of ASAE's Consultants Section Council. "Go to the leaders of the association world. Go to your colleagues in ASAE who are with individual non-profits or associations. Ask who they've used. Ask what the impact was of those people on their associations."

Many association executives say they keep lists of colleagues they trust and reach out to those people when they need to bring in extra help. But sometimes the expertise needed is in a niche area, or the referral list comes up empty on a specific topic. That's when other sources come into play.

"If the reason I need to hire a consultant is to do something not related to our industry—for example, manage a database conversion versus someone who needs industry experience to work on a project or program—I first look at the ASAE website and see who our [industry partners] are," says Paris. "Then, I go back to the listserver archives and search for comments on that particular topic."

Others suggest caution there. "You have to be careful of listservers," says Susanne Connors Bowman, a membership consultant and co-owner of the Haefer Group, Ltd. "People can go on there and promote themselves. You promote John, and John will promote you."

RFP Caveats

What should you not do? Both consultants and associations executives with experience hiring them say the open RFP is the worst way to do it—first, because narrowing down a large number of replies is tremendously time consuming, and second, because most experienced consultants won't bother to respond.

Rhea Blanken, president of Results Technology, Inc., an executive-management consulting firm, says she doesn't respond to RFPs that go out to more than a few candidates.

"It's a paper war," says Blanken, vice chair of the Consultants Section Council. "I'm a small shop; we have two people here. If I need backup research or writing or web design, I can hire someone, but I don't maintain a staff. Plus, if you send out an RFP that everyone can reply to, it's like comparing apples, oranges, and grapes."

Many association executives also hate the cattle-call nature of open RFPs and say they've stopped using them.

A closed RFP that goes out to a small handful of consultants can be helpful, but only when done the right way.

Detail in the RFP is critical, association executives and consultants agree. It should offer the consultants as much information as possible so they can decide whether and how to respond, and it should leave enough room for the candidate to explain why the firm's services might be right for the job.

"I had a 70-plus-page web project RFP recently," says Blake. "It's important for something like a web project, because the more [consultants] know up front, the better they can respond. The last thing we want to do with anybody is have them spin their wheels. You don't want people to waste their time. The more specific you can be, the better."

Blanken notes that a detailed RFP will help the consultant provide a more specific, customized response. "It behooves you to put together the RFP in a way that doesn't make us dump tons of information on the page that you don't need," she says. "It also behooves you to give us sufficient time to learn about you and present a document that presents us to you in that light."

Rely on References

As in any hiring process, checking references is vital.

"It's very rare for us to engage with a consultant we haven't already vetted through our contacts," says Blake. "References are really critical. I get a lot of calls to be a reference or provide references for consultants, and I try to respond to those calls."

Pierce notes that most association executives should feel comfortable sharing honest information about contractors. Regulations that limit what a former client can or should say about a consultant aren't as restrictive as those that apply to full-time employees.

"A full-time person, good or bad, was probably protected by lawyers at his or her past company," says Pierce. "Those [legal protections] are hard to break through. But hiring an independent

consultant is very different. You're not hiring a full-time employee who worked for a company, and so you have the right to dig in as deeply as you want. Ask follow-up questions."

Although many people hesitate to criticize someone they worked with in the past, you can probe for more information in tactful ways. Pierce offers an example.

"You call [a reference] and the person says, 'This woman was wonderful, and the entire staff loved her. She was a little disorganized,' and they go on," he says. "You wait until the end, and you don't ask. You just say, 'You mentioned a little disorganized,' and you leave a space and wait for the person to respond. Nature abhors a vacuum. Just leave a space. Everybody wants to speak the best of people. You're looking for something different, and it's called the truth."

IRP's Paris has developed a few effective methods of her own for getting an accurate picture of a consultant's performance for past clients. "I try to find out what each association does, explain my association, and ask if the person will fit in well under these circumstances," she says. "The other thing I do is look for organizations the person has worked for that were not provided as references and reach out to those people. I'll cold call and ask what they think." Then, she says, she gets the consultant's reaction to what was said.

There's general agreement that the key to getting a consulting relationship off to a good start is for both parties to be as open and honest as possible—outlining the exact job to be done, stating expectations clearly, and answering questions fully.

"I put the burden of that due diligence on the consultant," says Pierce.

"I think once you've been burned once, you learn to ask rigorous questions."

Kim Fernandez is a freelance writer in Bethesda, Maryland. Email: kim@kimfernandez.com

ASAE CONSULTING RESOURCES

For tools and resources that can help you work effectively with a consultant—including additional articles, sample RFPs and consulting agreements, and the ASAE Buyers' Guide—visit the ASAE Consultant Solution Center at www.asaecenter.org/consultants.