

Consultancy/Professional Services Best Practices

1. ***The skills associated with creating and operating an effective online store are widely diverse.*** You're unlikely to have all the requisite skills in-house. Hiring outside expertise to supplement your in-house capabilities is an effective approach. Among the most common skills hired on a temporary basis are design, SEO services, social or mobile media, custom code development, and back-office integrations and implementations.
2. ***Most consultants advertise a broad array of skills but are really best in a specific domain.*** Be sure the consultant or consultancy is bringing the level of expertise and/or the skill sets you need. A firm may advertise services in all areas of marketing but its true expertise is in SEO services. You must check background and references. Professional services firms frequently cite customers who have used their services but can be incredibly vague about what services they provided.
3. ***Have a clear contract and obtain a signed NDA (non-disclosure agreement).*** Make sure that, in your contract, you specify rights and ownership of all work created. Have a non-solicitation clause in your contract prohibiting the consultancy from hiring any of your people. Include a provision or penalty in case of late delivery.
4. ***Clearly describe your needs. Understand what problem you are asking the consultant to solve.*** Define deliverables in terms of concrete projects or target metrics. If the latter, make sure you have a baseline against which to measure.
5. ***Consultants can provide many different roles.*** Be clear on the role you are asking the consultant to play. Is the consultant an expert advisor/strategist, deliverables producer, document creator, facilitator, implementer, etc.? Be clear.
6. ***Clearly define the reporting structure.*** Who is calling the shots? There are lots of tradeoffs here. If the consultant has to gain consensus, time will be lost and it will be tough to determine accountability. If the consultant is responsible, you'll get quicker results, but it may rub some people the wrong way. Your people can sabotage an outsider's efforts, so make sure everyone has a vested interest in the consultant's success.
7. ***Understand the fee structure.*** What it is based on (time and materials, monthly retainer, deliverables), what it includes, what are the 'extras', who pays for expenses, etc.. Be sure the fees are in the accepted range for the industry vertical. Don't pay the total amount upfront.
8. ***Confirm whom you are hiring.*** Consultancies can be similar to ad agencies; that is, they bring their best people during the sales process but you get the associates after the close. Confirm that the key staff's availability and timelines match yours. Have a contingency plan.
9. ***Have a clear and objective way of measuring success.*** What is the end result that determines success? Is it documentation, processes, a decision, an implementation? Understand your options, if success is not achieved.
10. ***Make sure the consultant is a good fit in terms of style, temperament and personal skills.*** A mismatch here would be just as bad as a mismatch in terms of professional skills.