

Consultancy/Pros Svcs Key Questions to Ask Providers

General

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| <ol style="list-style-type: none"> 1. How long have you been in this business? 2. What size or types of clients fall into your “sweet spot”? | <ol style="list-style-type: none"> 3. What additional or supporting services do you offer (e.g., management, implementation)? 4. What references can you provide? Who are some of your other clients? |
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Organization

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| <ol style="list-style-type: none"> 1. How do you plan to work with our team? What process and the communication approach do you suggest? 2. Is your company a one-person shop or are you representing a consultant company?
If one person: <ol style="list-style-type: none"> a. How much availability do you have for this assignment? | <ol style="list-style-type: none"> b. Will you be working on any other projects?
If consultant company: <ol style="list-style-type: none"> a. Who is the engagement manager? b. How many other engagements will this person be managing? c. How many other people are on the project team? |
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Skills & Expertise

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| <ol style="list-style-type: none"> 1. What key skills are you bringing (either the individual or the project team)? 2. What expertise are you providing? | <ol style="list-style-type: none"> 3. While you advertise a broad array of skills, what is your most common type of project? |
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Project and Deliverables

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| <ol style="list-style-type: none"> 1. Do you have a project implementation methodology? <ol style="list-style-type: none"> a. Please describe the phases, key deliverables, client contact points, team structure, and roles and responsibilities. 2. How do you want to conduct this project? Are you comfortable with the reporting structure I have in mind (you may not be reporting on a daily basis to me)? | <ol style="list-style-type: none"> 3. What are the stages and the deliverables for each stage? 4. What is the work product at the end of the engagement? Do I have complete ownership rights upon delivery? Will you simply call my competitor and offer the same package to them after we finish? 5. Will we have the tools and the knowledge to move the project forward after you leave? |
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Pricing

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| <ol style="list-style-type: none"> 1. How do you charge for your services? (Time & Materials? Deliverables? Fees?) 2. Do your fees include expenses, travel time and other miscellaneous charges? | <ol style="list-style-type: none"> 3. What is the payment schedule? Are payments tied to results? 4. Do you have a standard contract to review? |
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