

*Not sure a writing consultant is right for you? Read this.*

## **Tips for Working with Consultants: A guide for foundations, nonprofits and businesses**

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Writing and communications consultants can help you accomplish a specific task that you and your staff can't do alone. Whether you need someone to write your monthly newsletter, prepare an annual report, research a grant, or manage your public relations, you can count on the fact that a professional consultant or firm is out there to help.

But with such a variety in types of consultants and expertise, how do you know how to find the one for you? And once you do find a consultant, what is the best way to work with them? Read here to find out.

### **First: Know What You Need**

Before you hire a writing consultant, start by deciding what *you* need. Determine what outcome you want to achieve, and what qualifications you seek in an outside professional. Only then can you find out who in the field can best help you meet your goal. Start by considering whether you *really* need a consultant. Ask yourself:

- What product or result do we want to accomplish? How will this help us fulfill our mission and goals?
- Do we have the expertise, time and resources in-house to accomplish it on our own?
- Is hiring a consultant the best use of our resources at this time?

The advantage to using consultants is clear: They allow you to gain expertise on a part-time basis, without the cost and office space of staff. Depending on the task at hand, they can bring proficiency and an objective point of view that you may not otherwise have available. If you decide that a consultant is the best way to go, consider these questions:

- What qualifications will we look for in a consultant? Is it important that they have worked with similar organizations? Would we prefer an individual consultant or a consulting firm?
- Should the consultant be located within our geographic area? Or with the capabilities of the Internet, can consultant be located anywhere?
- What will we expect of the consultant? What can the consultant expect of us?
- Who will be our main point-of-contact that works with the consultant?
- What is our timeline for hiring a consultant? For having the project or service completed?

- What is our budget? How much are we willing to pay for quality?
- How will we measure success?

Once you have thought through the project needs and desired skills you seek, it helps to draft an informal “job description” for your consultant-to-be. Job descriptions describe the consultant’s role and eligibility, and give candidates a clear idea on what you want to accomplish.

## Second: Select a Consultant

Hiring a writing consultant is similar to hiring an employee: you accept and review written information from applicants (often, those you have invited to apply). Next, you interview candidates, check references, and choose the one you believe will do the best job.

Instead of a resume and cover letter, consultants submit a proposal (also called a “bid”) for the project. Bids aren’t necessarily long or formal—but they do need to be clear. Some consultants write a simple letter explaining their background, experience, and how they hope to meet your needs. Typically, proposals include the following:

- **Consultant’s background**—skills, experience, working style;
- **Objectives and approach**—a description of the desired outcome, and the tasks to achieve that outcome;
- **Deliverables**—a description of the products or services;
- **Timeline**—a schedule for when the products or services will be delivered;
- **Fees and expenses**—a description of both *how* the consultant charges (by the hour, day or the project, for example), and *how much* (including expenses);
- **References**—other organizations with whom the consultant has worked;
- **Contact information**—phone, address, email.

You can evaluate proposal on a number of factors. The most obvious: Can the consultant deliver what you need, by your deadline and within your budget?

Before you hire a consultant, take a look at their experience with projects similar to yours. You will likely want someone with expert knowledge in the subject area or service, and a respected track record with other clients. Moreover, you will want someone with a working style and sensitivity that fits with your organization.

The last item is important. Many times, people will say how important it was to not only have the outside expertise, but also to have a consultant who “clicked” their company or organization. Overall, you want someone with an amenable working style, someone who shares similar values to your mission, and someone who is willing to take the initiative—and follow through.

## Third: Set Expectations—and Check In

Congratulations. You've found a writing consultant who is ready and willing to work with you. Now it's time to start the *real* work—the project or service you've hired the consultant to do. What can you do to support your consultant's work?

The success of your relationship with a consultant often depends on two factors: the expectations you set in the beginning, and how well both parties communicate once the working relationship is underway. Here are some ways to keep the communication open and productive:

- **Communicate clearly**—and in writing—your objectives and desired timeframe, and what you expect from the consultant. This is usually in the form of a letter of agreement. Be sure that both parties sign the letter of agreement—and are willing to stick to the terms.
- **If you haven't done so already, establish one person** to be the primary point-of-contact for the consultant. This helps streamline communication before and during the project.
- **Co-develop a work plan with the consultant.** Work plans give you a chance to sit down with the consultant and flesh out the project on paper. They will include the roles and responsibilities of all parties, and the desired outcomes, tasks, and deadlines. When developing a work plan, be sure to give the consultant enough time to do a good job for you. Discuss the flexibility of the plan, and what will happen if deadlines aren't met.
- **Be willing to share background information** to help the consultant prepare for the work. Give the consultant what he or she needs from you in a timely manner.
- **If you are a foundation or nonprofit**, make sure the board is “on board” with the project or service, in order for the consultant to have their full support. Keep the board informed as to the consultant's progress, or if appropriate, make it easy for the consultant to communicate directly with the board.
- **Strive for open communication** and regular check-in points. Develop a well-defined reporting system, including written reports, verbal reports at meetings, or status reports given by telephone or email. Pay attention, ask questions, and monitor the consultant's progress in a respectful and supportive way.
- **If necessary, be open to renegotiating** the contract through the course of the consultant's work.
- **At the end of the project, follow up** to let consultants know the impact of their work. If you feel it's appropriate, discuss the project strengths, and what could have been improved.

Keep this checklist handy during the course of working with a consultant. The better you know what you need up front (and the more you are able to communicate your needs to a consultant), the more you will build the trust and respect that is essential in a successful working relationship.