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## Technology

### Choosing a Technology Consultant

Practical tips to help you find the right person for your job.

by *Martin B. Schneiderman*

Many foundations and nonprofits don't have full-time information technology staff and must turn to consultants for expert advice.

I've been on both sides of this fence. I've selected and hired dozens of technology consultants, and I serve as one myself. Here are practical tips to help you choose the right one for you.

### What's In It For You

Grantmakers and nonprofits most often will call upon technology consultants to do the following:

- | Analyze problems and recommend solutions;
- | Analyze and define user requirements;
- | Provide an objective point of view;
- | Evaluate and recommend products, services and systems;
- | Provide project management;
- | Provide specialized expertise that internal staff doesn't have;
- | Augment in-house staff when work exceeds available resources; and
- | Provide technical training.

**Scope of work.** A detailed description of the work is critical to the success of your project. Without it, you're looking for problems. Clearly define the tasks to be performed, the responsibilities, the deliverables, and completion dates. Make sure that the tasks are reasonable and there are no hidden agendas that will lead to problems.

**The interview.** Interview and solicit proposals from multiple individuals and firms to compare approaches and costs. Ask thoughtful probing questions. Which candidates did their homework beforehand by researching your organization on the Internet? Did they ask good questions and demonstrate a clear understanding of your needs and issues before proposing a solution?

**Hire people, not firms.** Interview the individuals who will be doing the actual work; don't make your hiring decision solely based on the account executive. Beware of substitutes who are less experienced or capable. Avoid folks who have something to sell besides advice—commissions or profits on the sale of products and services can compromise objectivity.

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**The proposal.** Is the proposal mostly boilerplate or is it thorough and responsive to your expressed needs? Are the costs and the project timeline reasonable? Which consultants reply quickly to e-mail messages and phone calls?

**Qualifications.** You can't afford to hire somebody who will be learning on the job at your expense. Select a consultant that

- | Is a recognized expert in your area of need;
- | Has a track record of successes doing work on similar projects with organizations such as yours;
- | Is very knowledgeable about the hardware, software and services that you're most likely to use; and
- | Will stay focused, is realistic, has good reasoning skills and pays attention to details.

**Communications skills.** Top-notch qualifications and knowledge won't be enough if the consultant doesn't ask the right questions, listen well, and explain things clearly. Consultants should avoid technical jargon and always explain the terms they use. With whom will you feel comfortable asking "dumb" questions?

**Well connected.** Nobody can be an expert on everything. The best professionals recognize and readily acknowledge their limitations. They also have ready access to up-to-date information and a breadth of resources to fill in some of their gaps.

**Independence.** Avoid relationships that cause you to becoming dependent on the consultant. They should help you to identify the best long-term solution to your problem—one that doesn't benefit them. A wise consultant knows to avoid politics or special interests.

**Objectivity.** If your consultant is really objective, he or she may not tell you what you want to hear. Respect the consultant's right to do this, and don't enter into an agreement if this isn't possible.

**References.** Always get and check references thoroughly. If you hire a firm, references should be for clients who worked directly with your particular consultant.

**Great expectations.** Expect first-class work and accept no less.

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*Martin B. Schneiderman is president of Information Age Associates, Inc., ([www.iaa.com](http://www.iaa.com)), a firm specializing in the design, management, and support of information systems for grantmakers and nonprofits. He can be reached at [mbs@iaa.com](mailto:mbs@iaa.com).*

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