



## How to Play Nice with Consultants

Five nuggets of wisdom to make you a stellar client who gets great results.

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How to Create an Irresistible Brand on Any Budget**  
(Norlights Press)

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## What they don't teach you in business workshops

We all know that entrepreneurs and business owners can't go it alone. There's just too much to be done and only so much that we individually know. You often rely on the expertise of professional services consultants from accountants to designers to business gurus. As a brand and marketing strategist myself, I often wonder why some potential clients make things so much harder for themselves when engaging in these relationships.

I have been on both sides of the equation: consultant and client. And I've learned so much from my visits to both sides of the aisle. I believe I had great working relationships with consultants I hired because I had been one: I had walked in their shoes and knew what was "behind the curtain." I readily provided the information I knew that they would need to get back to me quickly and deliver the very best work.

I started thinking about my most difficult proposals and why some people understand the value provided right away while others do not. Don't get me wrong: the burden is on us as consultants and professionals to clearly and consistently communicate our value to our target audience and often we fall short. But I started seeing a pattern in the sales process that had nothing to do with what we were communicating: it had to do with some simple concepts about which many business owners do not even realize or know.

And why should they? There are countless books and resources about hiring the right people and managing your staff. But no one really ever teaches you how to effectively screen, hire and work with consultants. It's like the Wild West out there: none of the ground rules are communicated to the people who need them most, the people like you who are paying the bill!

This often results in frustration, unmet expectations and feelings of resentment – on both sides. Clients end up hiring the wrong person– or they simply feel paralyzed to choose between the thousands of experts out there and so they go with someone they know, even if it's not the right fit. No one wants to feel like they've just wasted time and money and still not gotten what they needed. And no consulting firm wants to waste time and effort going around in circles when they could be devoting that mindshare to their paying clients.

I'm sure you'd love to have the most fruitful working relationships with your consultants and vendors. After all, you're hiring them to make your business more successful, to help you achieve your goals and to delight your customers in some way. And consultants - honest, knowledgeable and successful consultants - want those same things. They want to please you, make you successful and have a real, positive impact on your business. We are all after the same things.

This guide will show you some practical strategies and questions to ensure you get the most out of all of your vendor and consulting relationships during the proposal process. It will help you efficiently get your ducks in a row before engaging in a proposal process. And by following these tips, you'll be able to get your consultants to provide a better proposal in a timely manner based on your specific needs.

## Every Client is Different – and The Same

Your business is unique. From your stage of growth to your market to your business model to even your personality and work style, each business presents unique challenges and opportunities. But at the same time, many of your challenges and opportunities are similar to so many others. Otherwise, consultants wouldn't be able to have a business that specializes in helping clients with the same problems over and over again.

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Huh? How can this be?

There are cookie-cutter solutions out there: packaged products, courses, templates, DIY solutions. There is a time and a place for those because they can address the similar needs that businesses share. But often, when you are engaging with a professional service firm: a branding agency, a designer, a business consultant – it is because you need a solution that is grounded in your unique strategy and stage of growth. That requires some customization of the solution being offered; regardless of the process or methodology those firms follow.

For example, many consultants tout their proven process for accomplishing certain tasks. Often, this is a framework that is followed in a perfect world scenario. It lets you know the consultant has a methodical approach to solving your problem. Some clients will fall easily into this process and follow it with textbook precision from start to finish. Other clients may need to “pop into” the process at a certain point because of work they’ve already done. Or they only need one or two sections of the process. It all depends.

These consultants can’t necessarily offer you a one-size-fits-all offering that you can simply purchase for \$5,000 through PayPal. It requires what is called Discovery. Discovery is normally when the professional has a preliminary conversation with you about your needs and objectives and digs a little deeper as to where in the process you may fall. Often this takes the form of a free live consultation or a preliminary phone meeting.

However, a consultant can only give away so much for free. They will spend more time digging into Discovery once the contract is signed so they can provide a more accurate assessment and statement of work for the rest of the project. It’s the research and fact-finding phase of the project itself. But it definitely begins at that initial meeting or call.

## Make the Most of Your Consultation

So how can you best prepare to ensure that first call and the subsequent proposal process go smoothly? By following these simple tips, you can save yourself frustration, get started on your project much faster - and make yourself a star client for whom vendors will bend over backwards.

### Tip #1: Articulate Your Needs and Goals

It’s not smart to waste people’s time by setting up a meeting or asking for a broad proposal for a consultant’s services. As mentioned, there’s probably a lot they can do depending on what you need. So be clear about why you are engaging with this person or firm. What are you trying to achieve? Why are you hiring them now?

“Increasing sales” is not specific enough. We all want to do that. The goal of any business is to increase sales and attract more customers. But what is really at the heart of your need? You have to define your goal now so you will know if you and the consultant have been successful. Here are some examples of how you can be more specific:

- We want to get covered in the Wall Street Journal
- We want to attract more young moms in the neighborhood to our store
- We are not the first restaurant that comes to mind when people think of a romantic date and we want to change that
- We need to merge two brands together and make sure we get the word out to our target audience
- We want to elevate our customer base from small businesses to large enterprises

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- We want our website to match our packaging to match our materials so we look like one company
  - We need to update and spruce up our outdated look to attract more young professionals
  - Our closest competitor is closing and we want to pull in their loyal customers
  - We want a unique brand that stands out in our lookalike industry
  - We want to target a new audience segment

You will notice some of these are needs and some are measurable goals. We'll get to measurable goals in a moment. But you can see this is something meaty that a consultant can use as context when developing a proposal to assess if they are the right fit for you or not.

### Tip #2: Define Success

How will you know you're successful on the project when it's over? Some consultants can help you figure this out along the way: we've done this for clients that have engaged on a brand strategy with us. But they at least had an idea of metrics they wanted to track – even if they were anecdotal like “Boost employee morale” or “Generate more social media buzz.”

You can work with the consultant you hire on this, but you absolutely have to have some idea in your own mind about what success looks like. When I work with clients on big branding projects, I often ask them to do a visioning exercise about writing their newspaper headline a year from now. What would it say? What would the customer quote be? This helps us get an idea of their desired “to be” state that would make them a happy client.

You'd be shocked if I told you how many conversations I have where prospects that have called me don't really know what they want or why they are doing it. How can they expect me a useful proposal that helps them achieve success if they don't know what success looks like?

### Tip #3: Be Honest

If you are merely information gathering or looking to contrast another vendor's proposal, be honest. I truly believe business owners have good intentions when they call and ask for proposals, but I have learned the hard way that I need to screen them first.

Creating a useful proposal takes time, which costs money if you are a consultant. Every hour you spend on developing proposals for someone who has not yet paid you is an hour of revenue lost. I don't think entrepreneurs see things this way. True, there is always some element of business development “cost” in which consultants invest. But just bear in mind how much work the process takes. As mentioned before, it's not like a good consultant worth her weight in gold will be sending you a 100% boilerplate process or proposal. They will need to invest time in a Discovery call and then spend a few hours reviewing your information and customizing the proposal – even if it's based on a repeatable process.

Be courteous and honest. If you are just starting to shop around for a new designer for something you plan to do a year or two from now, tell them. If you just want an idea on ballpark costs for a website but have no intention of building one yet, tell them.

More importantly, if a consultant has gone through the effort of crafting a proposal with you and you choose another firm, give them the courtesy of letting them know and closing the loop. I've worked on a few proposals for people and investing time and energy to get it to them as promised only to literally never hear from them again – even after repeated email follow-up on my part. That's just rude. Let them know you are considering it but won't be making a decision until next year or that you chose another vendor. You won't hurt their feelings, I promise!

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#### Tip #4: Determine a Timeframe – and a Deadline

Consultants budget their time and resources based on workload and bandwidth. Sometimes the nature of that work results in feast or famine. That means anything you can do to help them determine if they can take you on or not is important. Can they slot your work in around the work they already have? It will also help determine if it's unreasonable to ask for what you are asking in that timeframe.

I've had people call me and say they want a full brand developed for them (strategy, messaging and design work) for their launch in four weeks. I'm not kidding. I've also had people call to ask for a website – designed, approved, coded and tested – in two weeks.

Can you get those things from someone, somewhere? I'm sure you could, but I can't vouch for how good the work would be. But it's important that the consultant know if they can deliver what you need in that timeframe. "We need it yesterday" is not a timeframe.

What is the compelling event that requires this project? Work backwards from that. If there is no compelling event – not a trade show or a merger or whatnot – then make one up. But don't leave things open ended. Declare a "Due Date." If the consultant tells you that is not enough time, ask them what is and build the project plan back from there.

Open-ended projects will drag on and on. I promise you this and it does no one any good. Decisions get punted, feedback gets delayed and everyone gets frustrated. This also throws a consultant's productivity schedule out of whack as they try to juggle clients coming in and out. Determine a realistic deadline with your consultant and stick to it as best you can so the project can go smoothly. And be honest if you really want something in two weeks. As stated, you can find someone, somewhere to do those things for you.

An old consulting adage I love: Projects have three parameters: Good, Fast and Cheap. But you can never get more than two of these from any one vendor! There's good and fast (which costs a lot), good and cheap (which is not fast) or fast and cheap (which is almost always never good!)

Speaking of cost...

#### Tip #5: Have a Budget Number in Mind – and Share This Information

This is not a flea market. We are not playing chicken with each other to come up with the best price. Sure, there is some element of negotiation, but most smart, experienced consultants I know are honest with their rates and estimates based on the value and profit margins needed to run their business. They simply can't afford to take on projects that are too small.

The most frustrating thing to a consultant is when a client does not offer up any idea on what they are looking to spend. You have to have some sort of number in mind and we'll tell you if we feel it's unrealistic. No one wants to waste time on crafting a proposal that you may not even be able to afford. If you are unsure what things cost, just ask what a typical range is on that type of project before going into proposal stage. But you also have to be a responsible business owner and have a grip on what you can afford to invest to achieve your goal.

I believe clients are scared to share a number, as they think they will then get quoted for exactly what they have to spend. They are scared that they will be taken advantage of and that they should have offered up a lower budget.

This is childish and wastes everyone's time. We're talking about freelance consultants here, not huge global agencies who might unnecessarily pad for overhead.

As a good business person, you need to have money carved out for your activities. What is the number in your plan or even in your head? Share this with the consultant. If you want, low-ball it a bit. We're not mind-readers: we all

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need to be adults and get expectations out on the table. If you have not budgeted money, consultants get worried if will actually get paid. So go back to your financials and figure out what you can and want to spend.

Be open and honest with sharing your expectations. For myself, I'd much rather know upfront if a client cannot afford my services and then try to help them find a resource who is better suited for them than waste billable hours on scoping a project that may go nowhere. Or I can tell them what they can afford to do based on their budget and help educate them. They may not be able to get all the bells and whistles, but at least something can be arranged.

Yes, it's true. Consultants will sometimes make concessions based on interesting projects. But be honest. It will only help you waste less time and get to your goals faster.

## Summing Up

In order to get the best work out of a consultant to grow your business, you need to:

1. Know what you want and why you're doing the project
2. Define what success looks like at the end
3. Be open and honest
4. Determine a realistic timeframe and provide a deadline
5. Determine a budget and share this with the consultant

If you follow these simple steps, you are on your way to establishing healthy and fruitful business relationships where you get value and momentum for your business. Good luck!



## About Red Slice

RED SLICE is...

...a digital elixir of stories, advice & strategies to ignite your brand & delight your mind.

...a marketing & branding consultancy, where unforgettable stories become irresistible brands.

...a provocative sandbox for entrepreneurs who crave real business-building juice, with an inspiration chaser.



### About Maria Ross

Maria Ross is a brand strategist, author and speaker who believes cash flow and creativity are not mutually exclusive. As chief brand strategist and creator of Red Slice, she advises start-ups, solopreneurs and small to midsize growth companies on how to craft irresistible brands that engage, inform and delight. Maria is the author of *Branding Basics for Small Business* as well as the humorous and heartfelt memoir, *Rebooting My Brain*. A dynamic speaker, she has delighted conference audiences ranging from the Chamber of Commerce to *The New York Times*. Maria has been featured on MSNBC, ABC News, NPR and in *Entrepreneur*, *The LA Times*, *Seattle Business* and *Columbus CEO*.

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