

# Understanding Consulting Services

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There is a mystique around the term “consultant” or work described as “consulting”. In many cases it becomes a catch-all term for any one who wants to hang out a shingle. It is very important to the team of **Soltys, Inc.** that we give you a clear understanding of what to expect through our consulting services.

## ***Perspective, Objectivity, and Resources***

A consultant has the ability to look at your business needs through a different perspective with more objectivity and, in many cases, broader experience and or resources than the individual(s) in the day to day work operations or the owners of a company. We are able to come in with a clean slate, no agenda and the ability to maintain focus on your objectives.

While we develop close relationships with our clients over time, in most cases, we are working on your business and not in the business. This is a great advantage as we are not bound by the personal relationships or commitments that develop when you are too close to the fire.

The ideas, suggestions and solutions offered are not necessarily unique or original and often have been observed at work in another situation. Drawing on experience, creativity and resources, the consultant then works with the client to customize, implement and integrate a project or solution.

## ***Learning to Fish***

In a lot of cases, by the time the consultant is called in, the situation has developed to a level of near crisis or, at minimum, worn through the energy and creativity of the owners and staff. The hope often is that the consultant will either just come in and wave a magic wand fixing all of the problems or “just do it.” When the consultant comes in under these circumstances, the engagement rarely brings the results desired and the client often feels that “things were fine while the consultant was there and went back to status quo when they left.” The primary reason is that a good consultant must maintain a certain amount of distance to be effective and not become immersed in the situation. In order to make this work, the consultant must work through others to meet objectives, not be the point of fulfillment.

One of the highest complements that can be paid to the consultant is when a client comes back with a success story, talking about the results in the first person. In those cases, there was a transference and internalization of the ability to solve their own



problems facilitated through the consultant. A good consultant does not simply help the client but teaches them to help themselves. The consultant helps them learn, implement and internalize the needed skills, thereby learning to “fish.”

### ***When Do You Call in a Consultant***

- **When time is an issue:**

Time is indeed money. Even though the consultant’s fee may appear to be high initially, when you actually take a look at the cost of lost business or business problems that may be solved or greatly alleviated within a timely manner (and without you bearing the cost of gaining the experience and resources the consultant brings), the value becomes easy to see. If you need to take advantage of timing and do not have the time or money to invest in personnel, learning, and resources, it is time to consider hiring a consultant. You need to evaluate the potential of the results in determining the urgency of the need.

- **When highest and best use of resources is important:**

The consultant provides information, resources and expertise that can be available quickly and complimentary to current staff and resources. The consultant works in concert with the client staff and team helping to bring out the best in everyone without crushing spirit and energy. The consultant is non-threatening as the consultant is not a replacement hire.

- **When money is important:**

The consultant is usually a very good investment in working on money related issues due to clarity of vision, experience and distance from clouded issues that may obscure the ability to see or take actions needed.

### ***When is it Not Worth Calling a Consultant?***

- If you are unwilling to commit to making changes necessary.
- If you are really using the consultant to meet the needs of a personal agenda.
- If you are unwilling to work with the consultant to set achievable objectives.
- If the crisis has progressed to the point that there is no hope of valuable results.
- If you are unwilling to be open with information that will be valuable in the process.
- If you have already determined that this is an effort in futility.



## ***How to Make the Most of Hiring a Consultant***

### **Work that is not Project Specific**

Non-project specific work includes most items that are not related to implementation of technology tools and or systems. These may include business planning, operational audits, personnel issues, job descriptions, marketing, events, writing and documentation, strategic initiatives, branding and growth or exit strategies as well as many other kinds of work. Determine the objectives that you would like to fulfill with the consultant's assistance.

- a. Schedule a pre-engagement scoping call.
- b. Make sure that you have involved all of the necessary people in the process.
- c. Prepare for the scoping call by determining which objectives must be met to make the project a success.
- d. Determine any critical points in your timeline to share with the consultant.
- e. Think about your budget. Although you and the consultant have not yet discussed fees or costs, it will be much easier to scale the work to your budget if you have thought about it first.

### **Projects**

If this is a project to acquire and or implement new technology, tools and or systems, develop a request for proposal (RFP). In some cases a consultant is engaged to develop the RFP. In some cases, if you do not have enough information or manpower to do this, a consultant may be hired to assist you, changing the process a bit

- a. Once you have received the proposal back, review it to make sure that your needs will be met. Evaluate the suggestions and approaches offered by the consultant. Convert it to a plan that may become an attachment to the contract.
- b. Should you chose to accept the proposal in its initial form or a negotiated form, make sure that points of performance for all parties are clearly stated, with any consequences or benefits necessary.

### **Contracting the Engagement**

Soltys Inc. has a published rate schedule and works with a Master Services Agreement and Statement of Work.

The rate schedule covers a wide variety of work and methods of engagement from retainers to ad hoc consulting. It is not unusual for the work to be contracted under "other" on the schedule as much of the work does not fit into specific pre-defined categories.



The Master Services Agreement defines the relationship of parties and most boiler plate items related to contracting services. It is also the umbrella document governing any statement of work documents or other addenda.

The Statement of Work defines the specific work and or project with related time schedule and costs. The Statement of Work is always attached to a Master Services Agreement.

It is not unusual for the consultant to also be a provider of tools, software, publications or other items related to the work required. Many of these may already be in the consultant's resources but in some cases there are specialized requirements that have additional cost. The consultant will make sure that you are aware of anything that you may need to buy in addition to the consulting services and what your options are in making the purchase. These will also be stated in the statement of work. An example would be a user license for your accounting or operating software if the consultant is to have real time access.

It may seem like a reasonable approach between reasonable people to work without a signed document, however, remember that the risk and benefit of a contract will be a two way street. Lack of a contract provides little opportunity for recourse. Soltys, Inc. will not work without an agreement in place.

Finally, should you find that your needs have changed, keep the lines of communication open and work with your consultant to make the changes needed.

### **Contact Soltys, Inc.**

We welcome the opportunity to discuss working with you and your company.

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