



Managing Consultants: Should you stay or should you go?

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Do you need a consultant? (and what for?)

There are several vendors in this space.

- What's your focus?
- What's your vision?

Understand your internal resources.

Do you need a product or a consultant? (or both)

- Are you just starting out?
- Are you growing an already robust program?

Can you afford it?

**Be realistic, up front
(and honest) about
your budget**

**Read your SOW carefully!
“You get what you pay for”**

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How to work with a consultant

Understand strengths and weaknesses, remember your vision during the pitch process.

Discuss anything custom and timelines associated.

Evaluate and negotiate costs and benefits of your agreement.

You had five consultants come in. You're hiring one. (business shouldn't affect personal relationships!)

You've hired a consultant

Understand your consultant's teams and structures.

- Who is your POC?

How frequently do you want to/or need to communicate?

Who's involved in your approval process?

- How much support do you have?
- Do you have buy in?

Honesty in your historical data.

Pricing

Understand that a lot of what you see (esp. at the PAC conference) wasn't built in a day, and may have required a substantial (and gradual) budget.

You can (and should) build out your program.

- Don't launch a PAC day 1 and buy a custom website on day 3!

Crawl, walk, run

- Find a consultant (or consultants) that can deliver that experience and follow you each step.

What to expect

Legally required deadlines vs. projected completion dates

Don't wait until the last minute to hire a consultant!

Consultants can also be really useful in learning best practices!

Consultants are different.

- **Decide what your priorities are** – are you comfortable with templates or are you looking for something custom?

Takeaways

Questions?

