

SKILL BUILDING SESSION:

Leveraging Your Consultants

THE ADVOCACY CONFERENCE | FEB 7 2018



NJI MEDIA & CURLEY COMPANY



PRESENTERS:

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SELECTING YOUR CONSULTANT

Angie's List is Great for Finding a Plumber, Not So Much for Public Affairs Help

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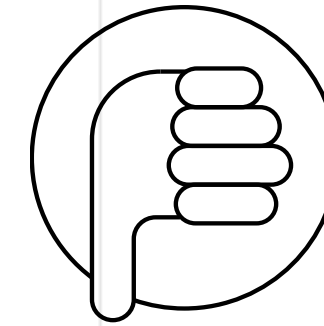
SELECTING YOUR CONSULTANT

Angie's List is Great for Finding a Plumber, Not So Much for Public Affairs Help



DO'S

Have SPECIFICS in mind (*i.e. what is the challenge that we're solving for*) and let those needs drive the process



DON'TS

Rely on a singular criteria - like budget or a personal referral - disproportionately dictate the process

DEFINING WHAT SUCCESS LOOKS LIKE

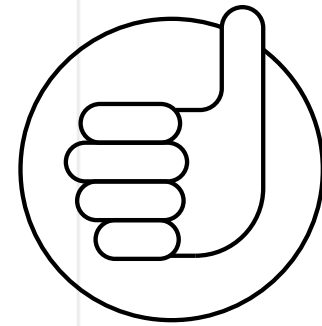
**(Your Dad was Right) A Goal is Just a Wish
Until You Write it Down**

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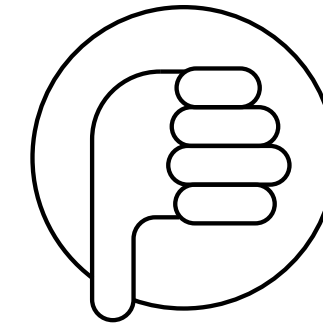
DEFINING WHAT SUCCESS LOOKS LIKE

(Your Dad was Right) A Goal is Just a Wish Until You Write it Down



DO'S

Set clear objectives, yet also prepare for the (often) nonlinear issues environment that we operate within



DON'TS

Believe your internal stakeholders are your primary audience for an advocacy/communications campaign

FORMALIZING THE SCOPE OF WORK

Do You Accept the Following Terms & Conditions?



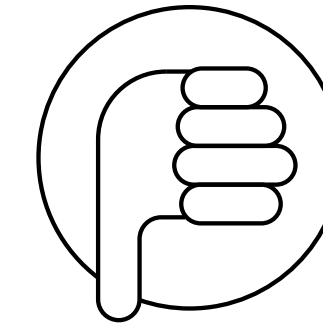
FORMALIZING THE SCOPE OF WORK

Do You Accept the Following Terms & Conditions?



DO'S

Expect scope development to be an iterative process that will force you to prioritize



DON'TS

Agree to the scope until it achieves both clarity and consensus

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**DEVELOPING AND AGREEING TO
A CLIENT SERVICES CONTRACT**

**Arranged Marriages
Can Work!**

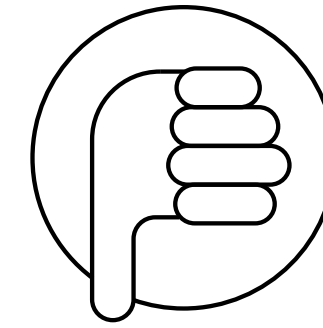
DEVELOPING AND AGREEING TO A CLIENT SERVICES CONTRACT

Arranged Marriages Can Work!



DO'S

Expect your consultant to be flexible
and work with you on parameters



DON'TS

Assume it's just a simple
administrative hurdle

DEFINING YOUR CONSULTANT'S OPERATIONAL ROLE

Do You Need a Carpenter or Just a Hammer?

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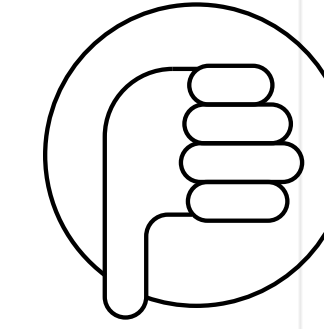
DEFINING YOUR CONSULTANT'S OPERATIONAL ROLE

Do You Need a Carpenter or Just a Hammer?



DO'S

Determine whether or not you will require your consultant to contribute and shape strategies or simply execute on those strategies



DON'TS

Allow internal personnel who are not directly involved with managing your consultant (and the respective project) to determine how to best utilize them

COORDINATION & COLLABORATION

“Production Meeting” Shouldn’t be an Oxymoron



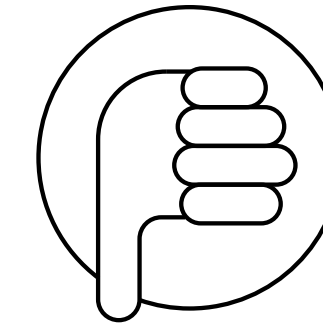
COORDINATION & COLLABORATION

“Production Meeting” Shouldn’t be an Oxymoron



DO'S

Provide more context/info than less -
if you want them to understand your
internal process and voice, share
everything you think is useful



DON'TS

Have a meeting without a clear
agenda and/or participants
without clear roles

COMPLETING REVIEWS & APPROVALS

Put Down Your Pencil and Turn Your Paper Over

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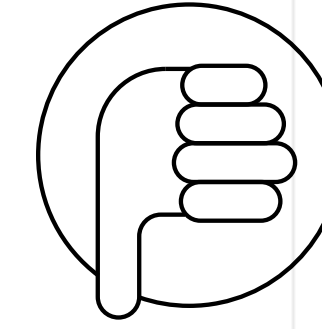
COMPLETING REVIEWS & APPROVALS

Put Down Your Pencil and Turn Your Paper Over



DO'S

Set clear protocols for who will be involved in reviewing and approving work produced by your consultant



DON'TS

Allow for open-ended review and approval timeframes

MANAGING TIMELINES & DEADLINES

Who Was Thrown a Ticker Tape Parade - Henry Gantt or Dwight Eisenhower?



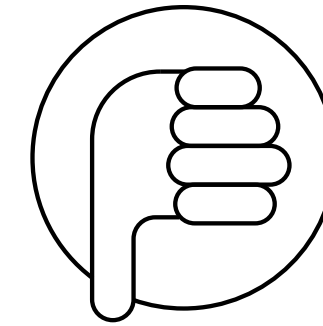
MANAGING TIMELINES & DEADLINES

Who Was Thrown a Ticker Tape Parade - Henry Gantt or Dwight Eisenhower?



DO'S

Expect that a diverse set of factors can influence the overall execution/ completion of projects



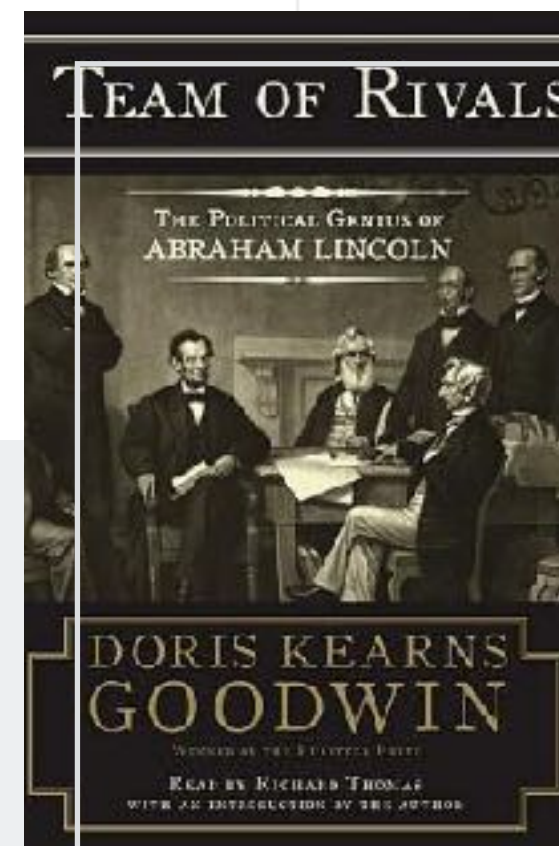
DON'TS

Have timelines for reaching key milestones that vary wildly for your consultant when compared to your own internal planning

CREATING A PRODUCTIVE ENVIRONMENT W/ MULTIPLE CONSULTANTS

Team of Rivals Wasn't Just a Good Book

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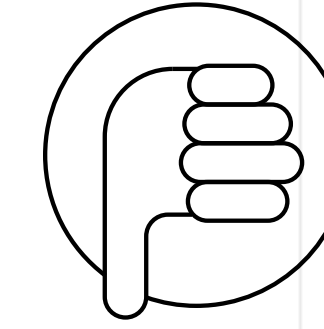
CREATING A PRODUCTIVE ENVIRONMENT W/MULTIPLE CONSULTANTS

Team of Rivals Wasn't Just a Good Book



DO'S

Be sure to set clear directives and guideposts in order to provide consultants with a defined “running lane”



DON'TS

Create an environment where consultants undercut one another and/or compete on an uneven playing field

EVALUATING PERFORMANCE

Is Your Free Agent Signing a Bust or Instant Success?



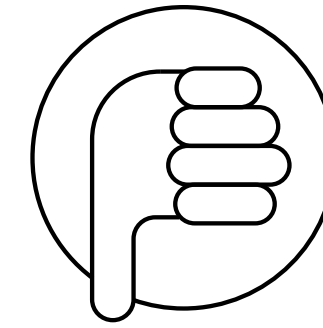
EVALUATING PERFORMANCE

Is Your Free Agent Signing a Bust or Instant Success?



DO'S

Expect your consultant to provide quantifiable measures of success



DON'TS

Forget or bypass having a “retrospective” brief or similar review at the conclusion of the project

QUESTIONS & FOLLOW UP

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