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**Make sure it's not your chosen consultant's motto!!!**



“Consultancy: If you can't be part of the solution, you can always make plenty of money prolonging the problem.”



# Selection of IT Advisor

- **An advisor could have a huge impact on the organization depending on the selection process**
  - Right selection: IT Advisor ROI is high given best practice people, process, technology approach to IT matters
  - Wrong selection: could cost someone their company / job
  - Wrong selection: potential costs versus little gain



# Why is selecting an IT advisor different?

- **You've hired people to work in and with your organization before...**
  - Terminology, buzzwords
  - Generalists vs. specialists
  - Hardware vs. software

# In-House IT vs. IT Advisor

- Subject Matter Expertise
- Core Competency
- Capacity and size of Project
- Training and knowledge transfer
- As-needed assistance

# Considerations in selecting your IT Advisor

- **What are your organization's needs**
  - What needs done
  - Needs should be your template to (dis)qualify potential IT Advisors
- **IT Advisor's Abilities**
  - Communications...tailoring the message
  - Reputation, market leadership, target market
  - Service offering spectrum



# Considerations in selecting your IT Advisor (continued)

- **Advisor's cultural / philosophical fit**
  - New ideas, fresh perspective
  - Relational or transaction oriented
  - Target market orientation and experience big / small company
  - Solutions that scale with your size / budget
- **Problem / Conflict Resolution Process**
  - Identification, escalation, mediation, termination (see checklist)



# Considerations in selecting your IT Advisor (continued)

- **Contractual Terms and Considerations**
  - Billing, Terms, Travel & Expenses (see checklist)
- **Advisor's IT / industry knowledge**
  - Industry knowledge requirements
  - Specific industry software/hardware experience required



# Considerations in selecting your IT Advisor (continued)

- **Advisor's human / capital resources**
  - Experience/capacity/availability to serve your account
  - Dedicated or shared resources
  - Interviewed or assigned resources
  - Resource management and accountability
  - Intellectual capital
  - Financial capital

# Considerations in selecting your IT Advisor (continued)

- **Value/costs associated with your Advisor**
  - Duties: strategic / technical / project / staff supplementation
  - High/low-profile and overhead structure
  - Number of resources required on/off-site
  - Time and materials versus fixed price
  - Cost of ownership...price versus efficiency
  - Travel and expenses



# Considerations in selecting your IT Advisor (continued)

- **Contract Considerations**
  - Your base IT service contract or theirs
  - Lays the ground rules of the relationship
  - Outlines the engagement and the break up
  - Major consulting contract components (see handout)

# Considerations in Selecting your IT Advisor (continued)

- **Proven track record of the Advisor**
  - Within your particular industry
  - References for similar: size companies, industries, advisory needs
- **Fit to your organization**
  - Flashy, high-end, inflexible, unfocused, highly/overly confident
  - Value and win/win oriented, focused on their core offering, professionally confident

# Considerations in Selecting your IT Advisor (continued)

- **Advisor's Teaming / Partnering Mindset**
  - Do not abdicate, your organization has to be involved, usually at multiple levels
  - Only consider advisors who can speak up and down an organization in your terms
  - Knowledge transfer is also an objective

## In Closing...a good IT advisor:

- Is not between jobs or unemployable
- Possesses the expertise you need
- Has done for others what will be done for you
- Has people, communication and presentation skills
- Understands the big picture as well as the details
- Is charged and able to help you succeed
- Is a problem finder and fixer
- Generates savings / efficiency / revenues



# Questions?

