

## Consultancy/Professional Services Best Practices

1. ***The skills required for creating and operating an effective online store are widely diverse.*** You're unlikely to have all the requisite skills in-house. Hiring outside expertise to supplement your in-house capabilities is an effective approach. Among the most common skills hired on a temporary basis are design, SEO services, social or mobile media, custom code development, and back-office integrations and implementations.
2. ***Most consultants advertise a broad array of skills but are really best in a specific domain.*** Be sure the consultant or consultancy is bringing the level of expertise and/or the skill sets you need. A firm may advertise services in all areas of marketing, but their true expertise is in SEO. You must check background and references. Professional services firms frequently cite customers who have used their services but can be incredibly vague about what services they provided.
3. ***Have a clear contract and obtain a signed NDA (non-disclosure agreement).*** Make sure that in your contract, you specify rights and ownership of all work created. Have a non-solicitation clause in your contract prohibiting the consultancy from hiring any of your people. Include a provision or penalty in the event of late delivery.
4. ***Clearly describe your needs. Understand what problem you are asking the consultant to solve.*** Define deliverables in terms of concrete projects or target metrics. If the latter, make sure you have a baseline against which to measure.
5. ***Consultants can provide many different roles.*** Be clear on the role you are asking the consultant to perform. Is the consultant an expert advisor/strategist, deliverables producer, document creator, facilitator, implementer, etc.? Be clear.
6. ***Clearly define the reporting structure.*** Who is calling the shots? There are lots of tradeoffs here. If the consultant that you're hiring has to gain consensus from your team, time will be lost and it will be tough to determine accountability. If the consultant is responsible for decision making, you'll get quicker results, but it may rub some participants the wrong way. Your people can sabotage an outsider's efforts, so make sure everyone has a vested interest in the consultant's success.
7. ***Understand the fee structure.*** What it is based on (time and materials, monthly retainer, deliverables), what it includes, what are the 'extras', who pays for expenses, etc. Be sure the fees are in the accepted range for the industry vertical. Don't pay the total amount upfront.
8. ***Confirm whom you are hiring.*** Consultancies can be similar to ad agencies; that is, they bring their best people during the sales process, but you may have less experienced team members assigned to you after the deal is closed. Confirm that the key staff's availability and timelines match yours. Have a contingency plan.
9. ***Have a clear and objective way of measuring success.*** What is the end result that determines success? Is it documentation, processes, a decision, an implementation? Understand your options, if success is not achieved.
10. ***Make sure the consultant is a good fit in terms of style, temperament and personal skills.*** A mismatch here would be just as bad as a mismatch in terms of professional skills.

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# eCommerce Diligence™ Checklist

## Consultancy/Professional Services Key Questions to Ask Providers

### General

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1. How long have you been in this business?
2. What size or types of clients fall into your “sweet spot”?
3. What additional or supporting services do you offer (e.g., management, implementation)?
4. What references can you provide? Who are some of your other clients?

### Organization

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1. How do you plan to work with our team? What process and the communication approach do you suggest?
2. Is your company a one-person shop or are you representing a consultant company?  
**If one person:**
  - a. How much availability do you have for this assignment?
- b. Will you be working on any other projects?  
**If consultant company:**
  - a. Who is the engagement manager?
  - b. How many other engagements will this person be managing?
  - c. How many other people are on the project team?

### Skills & Expertise

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1. What key skills are you bringing (either the individual or the project team)?
2. What expertise are you providing?
3. While you advertise a broad array of skills, what is your most common type of project?

### Project and Deliverables

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1. Do you have a project implementation methodology?
  - a. Please describe the phases, key deliverables, client contact points, team structure, and roles and responsibilities.
2. How do you want to conduct this project? Are you comfortable with the reporting structure I have in mind (you may not be reporting on a daily basis to me)?
3. What are the stages and the deliverables for each stage?
4. What is the work product at the end of the engagement? Do I have complete ownership rights upon delivery? Will you simply call my competitor and offer the same package to them after we finish?
5. Will we have the tools and the knowledge to move the project forward after you leave?

### Pricing

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1. How do you charge for your services? (Time & Materials? Deliverables? Fees?)
2. Do your fees include expenses, travel time and other miscellaneous charges?
3. What is the payment schedule? Are payments tied to results?
4. Do you have a standard contract to review?

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