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associations **how** | GUIDE TO
CONSULTING SERVICES

ON- POINT EXPERTS

HOW CONSULTANTS CAN HELP
WHEN YOUR PROJECT DEMANDS
SPECIALIZED KNOWLEDGE **8**

DO'S AND DON'TS FOR
CONSULTING CONTRACTS **4**

FOR BEST RESULTS,
MANAGE EXPECTATIONS **6**

Consulting
Services
Directory **15**

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8
Niche Knowledge

For associations seeking consulting help, one size doesn't fit all. Here's how consultants with specialized expertise can provide the specific assistance you need.

BY KRISTIN CLARKE, CAE



2
From Where I Sit

Help Is Out There
 By Mickie Rops, FASAE, CAE

3
Upfront

Money & Business: You Might Need a Consultant If...

Good Counsel: Consulting Contract Do's and Don'ts

Team Building: For Best Results, Manage Expectations

14

Q&A

Where You'll Need Help in the Next 10 Years

15

Consulting Services Directory



HELP IS OUT THERE

BY MICKIE ROPS, FASAE, CAE

You have in your hands a valuable tool. The primary purpose of the *Associations Now Guide to Consulting Services* is, of course, to assist you in finding consultants to help you in your association work. But it also includes some sage advice. Take some time to read the articles published here and learn from the consultants and association CEOs in the ASAE community.

I've been providing consulting services to associations for more than 20 years. Previously, I directed continuing education and credentialing programs for associations, working with several consultants along the way. I've also helped many clients find consulting firms. I've been on both sides of the request for proposals (RFP) process, and I've learned a lot. Here are some tips, from where I sit, on how to increase your chances of hiring the right consultant.

Don't send out cold RFPs to dozens of consultants. Many of the most qualified consultants rarely respond to these types of RFPs (myself included), so you may miss out on some of the best by casting a wide net. Focus on quality, not quantity. Locate a select group of consultants by using this guide and by asking your trusted network of association peers for referrals.

Next, schedule a call with each prospect to discuss your goals, needs, and project timeframe. Ask about their experience on similar projects. In a short call, you can learn a lot about a consultant's depth and breadth of expertise and their potential fit. You may discover that one consultant stands out, or maybe a few pique your interest. Ask these few to submit a



proposal (letting them know you're considering only a few will increase the likelihood that they will respond).

If you use an RFP, be clear on what you want responders to address. It is challenging to compare disparate proposals. Indicate what sections are required and in what format you want to receive responses. Here's what I usually ask for:

- understanding of the project
- statement of work (including methodology for each project task, contractor and staff responsibilities, deliverables)
- management and staffing plan
- experience and references
- budget (by project task and overall)

Then, summarize each proposal in a matrix so you can see them side by side. It takes some effort, but the clarity it brings to the comparison is worth it.

Don't prescribe methodologies. Focus instead on the outcomes you are seeking. If you spoon-feed a methodology, anyone can simply attach their costs. The most qualified consultants will shine through when you let them advise you on the best way to get to your desired outcome.

Now, with these tips in hand, page through this guide to see the breadth and depth of consultants available to help you move your association forward. And keep it on your bookshelf (it will also be available online at asaecenter.org) and refer to it when your association encounters a challenge or needs an extra hand. I believe you'll be glad you did.

MICKIE ROPS, FASAE, CAE, chair of ASAE's Key Consultants Committee, is president of Mickie Rops Consulting, LLC, in Indianapolis. Email: mickie@msrops.com

Don't send out cold RFPs to dozens of consultants. You may miss out on some of the best by casting a wide net. Focus on quality, not quantity.

MONEY & BUSINESS

YOU MIGHT NEED A CONSULTANT IF...

Associations hire consultants to help address all sorts of challenges. Here are some of the most common reasons why it might be time to seek outside assistance.

BY BRYAN OCHALLA

Do you or don't you need to hire a consultant for a project or ongoing work on your association's to-do list? That is the question many association executives ask themselves every day.

"There's a lot of association work that does not need consulting support," says Jackie Eder-Van Hook, Ph.D., president of Transition Management Consulting, Inc. But there are some common reasons why associations may need to get outside help from time to time.

At the top of the list: Your staff may lack skill, knowledge, or bandwidth in a particular area. For example, you may employ a consulting firm that specializes in providing temporary staff help to lend a hand when workloads are at their peak. Or you might engage a consultant to help execute your organization's public relations strategy. Some associations even outsource entire departments or functions to consultancies.

Your organization might benefit from working with a consultant if your staff keeps pushing off a project because they don't know where to begin or because a staffer or group of staffers blame themselves for creating a problem that needs to be solved, says Adele Cehrs, president of Epic PR Group.

Cehrs and her colleagues encountered the latter situation in a recent engagement. "We worked with a client on a real-time communications issue," she says. The staff involved "didn't want to address the issue because they felt responsible for causing it."

Her firm helped the staff confront the situation and navigate difficult conversations. "Oftentimes, organizations benefit from consultants who make them a bit uncomfortable," she says.

Other good reasons to enlist a consultant's help, according to Cehrs, include the emergence of an industry issue that staff isn't knowledgeable about or qualified to address, and when you need an outside perspective to help you catch up to competitors who may be outpacing you in a certain key areas.

Eder-Van Hook adds that you should consider bringing in an outside expert when:

- you need help defining a problem or deciding how to solve a problem.
- you need assistance collecting, summarizing, analyzing, or validating data or feedback.
- you need someone to serve as a buffer in a difficult or complex situation.
- you need someone who will ask difficult questions or tell the unvarnished truth.

Consultants can help association staffers see through their biases as well, she says. Specifically, if you find yourself saying, "We tried that before," or if you've started to turn up your nose at new ideas, a good consultant will get you over those obstacles.

Above all, don't "overestimate [your] capacity for thinking—and working—through complex situations," Eder-Van Hook says.

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Your organization might benefit from working with a consultant if your staff keeps pushing off a project because they don't know where to begin.

CONSULTING CONTRACT DO'S AND DON'TS

When it's time to work with a consultant, plan for the best but prepare for the worst with a solid contract.

BY EILEEN MORGAN JOHNSON, CAE



A good contract forms the basis for your collaboration with a consultant. Follow these do's and don'ts to improve the likelihood of a good working relationship and results that meet your association's needs.

▲ **DO SPELL OUT EXPECTATIONS.**

Is the consultant providing advice, conducting research, leading a board retreat, designing a website, or planning a conference? The contract should clearly identify what services or deliverables are expected. Don't forget to include the association's role—for example, providing background materials, scheduling meetings, or reviewing drafts of reports.

▲ **DO SPECIFY MILESTONES.** These are project components that are to take place or due to be delivered on a certain date. For example: "The first draft of the communications analysis report will be delivered on or before May 1, 2018." Milestones help to

ensure that the project is proceeding on schedule and give you and the consultant the opportunity to identify any open issues or revise the schedule as needed. Identify any dates that you cannot change, such as dates of board meetings where the consultant's work product will be presented.

▲ **DO IDENTIFY EXPENSES.**

Expenses typically passed on to the client include overnight courier charges, conference calls, copying, and online research fees. Note any allowable markup on expenses. Include any anticipated travel expenses for the consultant to attend meetings at your association's office or other locations and disclose any travel expense policies that the consultant must follow.



DO OUTLINE PAYMENT TERMS.

Payments can be tied to milestones or made according to another schedule. Most consultants charge on an hourly basis, although some will complete a project for a flat fee. A good rule of thumb is to pay no more than one-fourth of the total fee upon signing the contract, arrange for some payments midway, and hold back at least one-fourth of the payment until the consultant has completed all work to your satisfaction. If the consultant is charging by the hour, make sure the contract specifies that the final invoice will not be paid until you are satisfied with the work product or service performed. Avoid paying on an hourly basis with payments made the same day as your association's payroll, as this could lead to the conclusion that the consultant is an employee.



DO SPECIFY OWNERSHIP OF ANY WORK PRODUCT.

If you hire a consultant to design a new website, be sure that the association owns the domain name and all content. Or if a consultant will design a new media kit, the association should own all rights to its contents so you won't have to get permission to make changes. Beware of shared copyrights, as either owner may use the work without the other's permission.



DO REQUIRE THE CONSULTANT TO OBTAIN RIGHTS FOR ANY THIRD-PARTY INTELLECTUAL PROPERTY USED IN THE PROJECT.

The consultant should turn over the copyright assignments or licenses to the association with the final work product. All rights should be in the association's name, with the consultant acting as an agent for the association.



DON'T BE AFRAID TO SUGGEST CHANGES.

If the consultant presents you with a proposal, scope of work, or contract terms that aren't right for your association, work with the consultant to make appropriate revisions. The document you sign should reflect the actual terms of the deal.



DON'T EXPECT THE CONSULTANT TO CHANGE THE PROJECT'S SCOPE WITHOUT OTHER CHANGES.

If the scope of the project expands beyond what is initially anticipated, the consultant will probably need to change the fee and the timeline for deliverables.



DON'T WITHHOLD INFORMATION.

Your consultant needs the full picture in order to give you the best advice.



DON'T AGREE TO PAY ONGOING LICENSING FEES FOR CONTINUED USE OF THE CONSULTANT'S WORK PRODUCT.

This requirement is sometimes found in consulting contracts for software development. This practice is not illegal, but it can be costly. Any ongoing licensing rights payment should be included in the total cost of the project.



DON'T AGREE TO AUTOMATIC CONTRACT RENEWALS.

If you have a reliable contract management system, then automatic renewals are not a problem. But without such a system, you might have contracts renewing that are no longer of value to your organization.



DON'T SIGN A CONTRACT BEFORE YOUR ASSOCIATION IS READY TO BEGIN WORK.

Consultants schedule their time based on anticipated client needs. If you sign a contract and are not prepared to proceed, the consultant might miss opportunities to take on other projects before your association is ready to move forward.

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MILESTONES HELP TO ENSURE THAT THE PROJECT IS PROCEEDING ON SCHEDULE AND GIVE YOU AND THE CONSULTANT THE OPPORTUNITY TO IDENTIFY ANY OPEN ISSUES OR REVISE THE SCHEDULE AS NEEDED.

FOR BEST RESULTS, MANAGE EXPECTATIONS

Want your next consultant engagement to end in success? Set expectations early and manage them along the way for the best possible outcome.

BY BRYAN OCHALLA

It goes without saying that it's important to set and manage expectations when your association is working with a consultant. But many executives and staffers don't do it well, and Rick Whelan, CDM, president of Marketing General Incorporated, says he can't blame them.

Working with a consultant "isn't something most associations do every day," says Whelan. But if staff and consultant "don't create a good foundation in the beginning, it's going to be hard for them to do a good job on the back end."

So how can you lay the groundwork for a successful relationship? Start by asking a few important questions:

Why do you need a consultant?

This is the critical first step, Whelan says. "Basically, what is the pain you're trying to avoid or the gain you're trying to achieve?"

What expertise do you need?

Before you start searching for a consultant, you need to identify the skills or knowledge that your internal staff lacks and determine how

long you'll need external assistance. Walt Marlowe, MBA, CAE, executive director of the American Association of Pharmaceutical Scientists (AAPS), remembers a time when his organization stumbled on this step. "We engaged a consultant to assist us in implementing a major upgrade to our membership database," he says. "We did not do a good job of defining the skill set we needed." AAPS had to terminate the relationship, reexamine its plan, and find another consultant.

What's the plan? You need agree-



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ment on what work will be done, who is responsible for specific tasks, and what happens if the project encounters an obstacle or otherwise stalls.

A failure to answer these questions at the start means you can't "convey the correct information to the potential consultants about the scope" of the project, Marlowe says. That not only creates problems when you hire a consultant, but also when you try to "assess whether or not the engagement is moving forward successfully or ever achieves its end goal."

To successfully manage expectations in a consulting engagement, follow these pointers from Whelan and Marlowe:

Communication is the key—or at least one of them. In particular, Marlowe says, "if you keep communication clear and up to date ... you'll do well." One way to accomplish this is to check in regularly. "There shouldn't be weeks or months of silence," Whelan says.

Be flexible. Marlowe warns against treating your initial plan like

it's set in stone. Expect a good consultant to provide guidance and advocate for changes to scope, schedule, or success metrics when needed—and make sure you seriously consider those suggestions. After all, "I am engaging the consultant mostly because I don't have the expertise," he says.

Hold up your end of the bargain. "Both sides of a consulting relationship need to be involved and engaged,"

Whelan says. Marlowe adds that the relationship "is a two-way street. You have to be a good customer for the consultant." In other words, if you promise to do something or deliver something to your consultant, don't drop the ball.

BRYAN OCHALLA is a freelance writer in Austin, Texas. Email: bochalla@yahoo.com

IF STAFF AND CONSULTANT "DON'T CREATE A GOOD FOUNDATION IN THE BEGINNING, IT'S GOING TO BE HARD FOR THEM TO DO A GOOD JOB ON THE BACK END."

—RICK WHELAN, MARKETING GENERAL INCORPORATED



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In what areas are associations likely to need the most assistance from consultants in the next 10 years?



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Associations are going to need help staying ahead of the technology curve. The rate of change in capabilities and pricing is such that we can't stay on top of it. What was unaffordable 18 months ago is now within our grasp. What was once unimaginable is now possible.



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In the future, technology will take over some of the current work of consultants by providing more of the analysis of data. There will be online repositories of information where organizations will enter their data and get key insights into all aspects of their operation. Consultants will help organizations work with those tools. From a vast array of options, consultants will clarify what's available, understand any biases, and provide the story behind the data points.



JAY YOUNGER, FASAE

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The next decade will be a time of dynamic change for associations. Demographic trends will continue to profoundly change our markets, technology advancements will impact our methods of connecting with members, and an increasingly unpredictable geopolitical landscape will stretch our capacity to effectively advocate for our missions. Amid this dynamic environment, firms that provide the highest-caliber services in business strategy, performance management, data analysis, and market development will see more than their fair share of demand.

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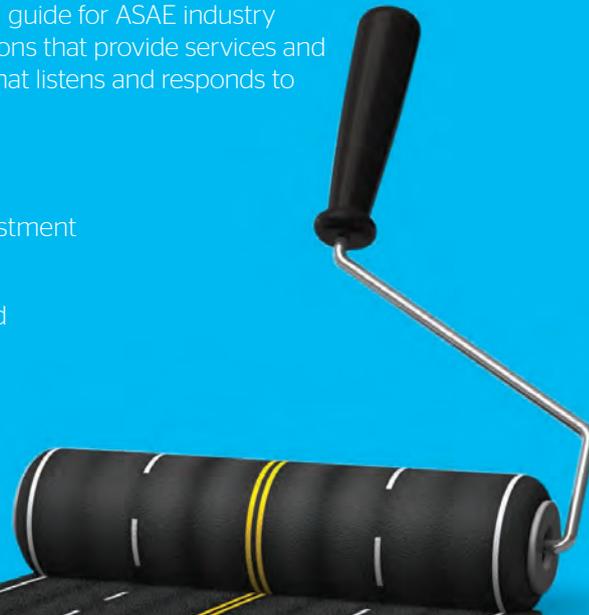
The Industry Partner Alliance (IPA) Committee is more than a guide for ASAE industry partners. It's more than a group of companies and organizations that provide services and products to ASAE members. The IPA is a strong committee that listens and responds to the needs of the industry partner community.

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