This is the second in a series of four columns on working effectively with consultants.

When the client and consultant are discussing problems and how the consultant could help, both parties must be conscious that a consultant always has two allegiances: to the manager hiring her and to the firm employing the manager. You must define the scope of the consulting assignment so that the consultant can in fact legitimately tackle the task. For example, it would be pointless for a local manager to request assistance in implementing a security solution requiring corporate-wide changes. Such a project would be beyond the manager’s scope.

The converse problem is consultants, especially those from large firms, which use templates to prepare consulting reports where string variables are modified to include details from the client firm but which have little research and less analysis of the specifics of the client’s situation and needs. It is an excellent practice to ask for a couple of sample anonymized reports from consultants before accepting their proposals; finding identical language in substantive sections of the two reports should give you pause.

As you evaluate potential consultants, look for those who can state their understanding of your problems clearly. I am fond of the phrase, “Let me see if I have understood” because it’s a chance to test my perceptions against those of the client. Ask your candidates to tell you how they see your situation and to define the problems they perceive.

Be especially attentive to consultants who challenge your initial views of your problem: you want consultants who are able to think independently and bring their expertise to bear on your problems, not sycophants who are willing to hide their knowledge and their disagreement to get the contract. Just as important, you want consultants who can articulate their views clearly and non-aggressively. You need a reasoned exchange of views from which to learn, not a boxing match where winning is the object.

Sometimes consultants are (foolishly and improperly) asked by managers to produce support for a predefined set of conclusions as part of an internal political battle; consultants must be clear that their report may very well disagree with preconceptions. Indeed, consultants should be chary of accepting such assignments: they can be the kiss of death, since providing a professional result that conflicts with the client’s predetermined outcome can result in slanderous comments in the community, yet unprofessionally kowtowing to unreasonable demands can justifiably lead to a tarnished reputation, litigation for malfeasance, and perhaps expulsion from professional societies.

In the next column, I’ll look at relating to consultants for effective use of your time and money.

* * *

M. E. Kabay, PhD, CISSP-ISSMP <mailto:mekabay@gmail.com> specializes in security and operations management consulting services. CV online.<http://www.mekabay.com/cv/>