In the world of business today, most firms have used or will use consultants. Contact Centers are no exception. Getting help from the “outside” can be a powerful resource to the “inside”.

To decide if your contact center would benefit from the use of a consultant, ask yourself the following questions:

- Are we using our resources efficiently?
- Are we delaying projects with opportunity because we don’t have time to get to them?
- How do we measure up to other companies in the areas of people, customers, technology and cost effectiveness?

If you are not completely comfortable with the answers to these questions you should consider the value the right consultant might bring to your center. There are four primary situations that might prompt you to look for outside help:

- You need specialized expertise you don’t have on staff. You might be able to tackle the job, but probably not as effective or efficiently as an expert.
- You are addressing a specific symptom and want a fresh perspective on the matter. You may want to have a brainstorming session to stimulate creative thinking.
- You have the skills to do the job, but you don’t have the time or resources to do it. There are just not enough arms and legs to get it all done.
- You have been asked to research, evaluate and recommend technology solutions. Where to start?

Once you have determined the need for a consultant you can do business with a large firm with a national reputation or a small firm with a personal approach. Either can provide expertise and results you need yet approach and cost may be significantly different. First think through what you want to accomplish. Then follow these steps to ensure the consultant meets your expectation:

1. Check references to determine if other clients were satisfied with the approach and results. What was the impact on the workforce?
2. Does the proposal document the approach?
3. Large firms often bring in a team of consultants. Ask who will be doing the work.
4. Consider pricing options. Per project, per day or ask about a retainer (with discount) for long-term engagements.
5. Determine the deliverable. Will it be a written report? Will it include observations, recommendations, implementation steps and/or a finished product?
6. What will be required of you, office, PC, Internet, administrative support?
7. Ask for weekly progress reports with accomplishments and observations.
8. Assign someone on your staff to be a liaison to the consultant during the engagement.
9. Include a non-disclosure to protect your company data.
10. Proposal, contract and summary report should all be consistent. Be sure everything is included.

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