

WORKING WITH MARKETING CONSULTANTS

How to get the results you want

by Gary E. Lofstrom

As companies grow and prosper, the need to develop business and generally market the organization changes significantly. Start-ups can no longer count on the personal reputation and energy of the entrepreneur(s) to attract new customers and retain current clients. Entrenched businesses find what used to work so well, doesn't any more. And the vagaries of our social, economic and political surroundings can wreak havoc on the best of capitalists.

So, perhaps a little help is in order. A third party marketing specialist can bring insight and perspective to any business. But, as with any intangible service, you'd be wise to follow a few simple guidelines when hiring and working with a marketing consultant.

Self-assessment, the First Step

Sales are down, so a boost in advertising, or the hiring of an experienced sales representative, can certainly remedy the situation, right? Probably not. A decline in sales is a symptom, but the real problem lies underneath the revenue charts. With a little introspection, you may discern your company's true difficulties.

Self-assessment is the process of mentally pulling yourself away from the business and taking an honest look at your people, the organization, the industry trends, general business environment, and any other significant factors. Put down in writing what you discover. If you don't know, or are uncertain of your specific problems, hiring a consultant to formally review your business may be your first priority.

Not too long ago a service organization came to me for new sales literature and a publicity campaign. After undergoing a business review, I discovered turnover of younger staff was deplorable and clients' work was typically late and error-filled. The firm decided their initial priorities were to rectify some human resource management issues and devise strict client review processes. When employees and clients began to see notable improvements, we initiated a marketing campaign.

Finding the Right Skill-Set

Perhaps you're confident that you have a specific "marketing" need. But, what does marketing mean in your circumstance? Is it advertising, public relations, direct marketing, editorial, video, graphic design, sales management/training, desktop publishing, market research, new product development, promotions, premium marketing, word processing . . . or some combination of these?

Marketing people tend to enter the profession through one of these above-mentioned concentrations, and the initial skills gained usually remain a strong suit for them. While, this can be a plus, be sure your consultant has the ability to see the "big picture," quickly comprehending the problems and opportunities of your business and your industry. They must also be able to create a feasible marketing plan from their observations.

For example, one consultant I know is an award-winning graphic designer. But, his aptitude in understanding and solving business problems has allowed him to work successfully with top managers of large companies. Today, he rarely works personally on the design aspects of a marketing campaign, instead delegating that role to staff members.

Other Qualifiers

Once you've decided you need some help, and narrowed down the general skills needed, you'll be quite anxious to hire someone and get started. A number of elements, or qualifications make for a good relationship. Consider these elements as you interview candidates:

- **Size.** If you're a small company, it doesn't make sense to hire a large, full-service agency. Instead, consider individuals on up to shops of no more than ten people.
- **Experience and Awards.** Educational background, job experience, and a list of clients can tell you a lot about a consultant's qualifications. Many consultants seek and win awards; some have a disdain for the entire process. Don't rule out consultants without awards.
- **Industry Expertise.** It can be a real benefit to work with someone who has experience in your industry or profession. They'll already have an in-depth knowledge of the problems, opportunities and issues you face. On the other hand, someone with general, but extensive, exposure to a variety of industries brings a certain freshness and curiosity to your situation.
- **Number of Clients.** Choose a consultant where you will be a high priority, but where you're not the only client. You don't want the consultant to be dependent solely on your business for his or her income.
- **Chemistry.** Good personal chemistry is as important as professional expertise. Look for a person who can readily relate to your industry, your culture and your people.

Contracts and Fees

No doubt from your own experience as an entrepreneur, you've learned the meaning of "get it in writing." The same holds true here. A written agreement, even a simple letter, gives both parties distinct expectations as to what will be done, by whom, and when.

Marketing consultants work under a variety of arrangements. Most common for smaller businesses is to charge by the hour or for the project. Advance retainers (of one-third to one-half of the total cost), are common, especially for new clients.

Larger companies may want a more continuous consulting relationship. This is often the case when a company desires a more aggressive marketing effort, but chooses not to internally staff a position. In this situation, consider half-day or full-day rates, or a monthly retainer.

Working with the Consultant

Often business owners presume the hiring of a consultant allows them to sit back and watch the consultant solve problems. But in practice, successful consulting engagements rely heavily on receiving management's time, insight and personal involvement. Using a consultant is essentially leveraging your knowledge and objectives with the problem-solving ability of an experienced professional.

Successful working relationships are not adversarial. They are characterized by confidence, understanding and cooperation. With each project, know what you want to accomplish and communicate that clearly. Are you after sales increases, improved morale, a boost in image, development of an industry niche, heightened name recognition, etc.? Give the consultant enough freedom to creatively solve-problems. Be open to change, your old ways of doing things probably need an overhaul. Most importantly, when you work with a qualified, motivated consultant, expect results. That's what it's all about!