

## CONSULTANT SCREENING QUESTIONNAIRE

You need help with your business, and you've decided to get help from a consultant.

Use this list of questions during your discovery discussion to find a consultant that's the best fit for your and your business needs.

CONTACT DETAILS	CONSULTANT 1 NAME:	CONSULTANT 2 NAME:
<b>Website</b>		
<b>Phone number</b>		
<b>Email address</b>		
What is your area of expertise?		
What is your knowledge of my industry? <i>Remember industry knowledge is important but so is having a range of experience. You never know where a solution to your particular set of problems might come from.</i>		
Do you have Standards technical knowledge?		
Have you worked with similar sized businesses to mine?		
Will you be able to integrate my current systems with any new processes?		

QUESTIONS	CONSULTANT 1 NAME:	CONSULTANT 2 NAME:
<p>If we work together, what is your usual process and availability? Can you give me an example of how you have approached similar issues with other clients?</p>		
<p>Do your services include management and employee training and education?</p>		
<p>What makes you different from other consultants?</p>		
<p>Can I contact any previous clients for referrals?</p>		
<p>What insurances do you carry? <i>Professional indemnity insurance isn't compulsory, but a credible business would have this and not just mandatory requirement such as WHS..</i></p>		

<p>How do you ensure confidentiality regarding anything we discuss?</p>		
<p>What access will you need to my systems and documents? <i>Will they need hard copies of documents or access to your database or intranet?</i></p>		
<p>Impressions and considerations</p> <ul style="list-style-type: none"> <li>• <i>Does the consultant's personality feel like a fit for you and your business?</i></li> <li>• <i>Are you speaking to the person you'll be working with?</i></li> <li>• <i>Are their fees transparent?</i></li> <li>• <i>Do you feel like you're being sold to?</i></li> <li>• <i>Are they interested in your business or just making money?</i></li> </ul>		