

# Questions to Ask an IT Consultant

How do you select the right IT consultant for your needs, your business and your budget? This checklist will help.

Get referrals for IT consultants from colleagues, local business organizations and connections on social media.

## LIST POTENTIAL CANDIDATES HERE:

NAME	COMPANY NAME	CONTACT INFORMATION
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____

Determine what issues you need help with and whether they are short-term or ongoing concerns. For example, a consultant may help you with improving existing technology, developing a technology plan, setting up a business network, maintaining data security and/or troubleshooting technology problems.

## LIST YOUR NEEDS HERE:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

Determine a general range for your monthly technology budget (including the cost of the consultant).

Budget: \_\_\_\_\_

Use this checklist to get answers from each consultant you are considering.

## EXPERTISE

- How long has the company been in business?
- How much experience do they have with small business in general?
- How much experience do they have with your industry?
- Have they worked on similar projects/systems/software/networks before?
- Do they specialize in the types of hardware, systems and software your business uses?
- What industry certifications or accreditations do they have, and how up-to-date are those?
- Are they vendor-authorized? (This means the consultant is trained to meet a specific vendor's standards for working with its hardware or software.)

## STAFF

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- How big is the staff? A one-person IT consulting company may not have the coverage you need in case of emergencies.
- Who will be you be working with—a senior consultant, a junior consultant, a technician or an overseas contractor?
- If working with multiple staff members, who will oversee your project?
- Is the consultant's personality compatible with yours?
- Does the Consultant speak "plain English," explain technology issues to you clearly and show patience when you ask questions?

## PROCESS

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- How often will the consultant meet with you, and how (in person, by phone, by videoconference)?
- Do they have the capability to remotely monitor, diagnose and update your network, hardware and software?
- Do they provide training for you and/or your employees after new technology is introduced?

## COST

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- How are the consultant's fees set (hourly, per project, flat fee/retainer)?
- What are the payment terms (upfront deposit or payment, monthly, quarterly, annually, upon completion of a project)?
- How are unforeseen costs handled and billed?
- Does the consultant earn a commission from companies whose products/services they recommend?

## CONTRACTS AND TERMS

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- Ask to see their standard contract. What does it cover?
- Do they have professional liability insurance? This protects your business in case the consultant makes an error or overlooks something that causes a problem for your business.
- What kinds of guarantees do they provide?
- How are you compensated if guarantees, deadlines or deliverables are not met?
- How do they respond to emergencies? Ideally, you want a company that guarantees response within one hour and provides remote management and support.

## REFERENCES

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- Do an online search and check with the Better Business Bureau to see if there are any serious complaints against the IT consultant.
  - Obtain at least three references from the company and check them. Make sure they are businesses similar to yours (i.e., other small businesses or companies in your industry).
1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_
- Perform a background check if the consultant will be dealing with sensitive customer or financial data.