

WORKING WITH
CONSULTANTS

Resources for Funders
and Nonprofits

HIRING A

COMMUNICATIONS CONSULTANT

BOB TOBIN, WILLIAMS GROUP

 S. D. BECHTEL, JR.
FOUNDATION
STEPHEN BECHTEL FUND

Communication is a tool for impact

Communication involves the purposeful delivery of information to create awareness, understanding, or action. It's a big topic, with application to virtually everything an organization does, inside and out. This brief tutorial can help people working in foundations and nonprofits effectively prepare for and conduct engagements with communication consultants.

This guide begins with the below summary of the types of organizational interests that lead to hiring communication consultants. It continues with a description of how organizations can prepare to productively bring a communication consultant onboard. And it concludes with a few topical tips that might enhance the process and outputs of an engagement.

Why do nonprofits and foundations hire communication consultants?

The process often begins with a desired change. For example, it may be time to hire a consultant when your organization says that *we need to*:

- Be better known
- Sharpen our message
- Reach more people
- Update our identity
- Present our case to donors
- Deepen our relationships with partners
- Rethink our positioning
- Make better use of our website
- Build our image
- Expand our service area
- Launch a new program
- Change our identity
- Shift perceptions on an issue we care about
- Share lessons or practices that can benefit others
- Understand our stakeholders
- Align our staff and board
- Form or strengthen partnerships

What can a communication consultant do?

In practice, communication consultants address a wide range of needs. You might contract with a consultant to conduct:

- Audience and market research
- Brand development
- Communication planning
- Logo creation
- Storytelling
- Website and digital strategy
- Social media programs
- Crisis communications
- Message development
- Advertising
(radio, TV, Internet, outdoor, newspaper, etc.)
- Videos
- Public relations and media placements
- Naming
- Annual reports, brochures, literature
- Campaign design and management
- Event management
- Knowledge sharing
- And much more!*

Start with strategic intent

What does it take to be ready to hire a communication consultant?

Most professional communicators will expect you to help them understand three things...

1	<p>Your project purpose: What are you trying to achieve with this communication effort?</p> <p>How does it support or advance your mission?</p>
2	<p>Your target audience: Who are you trying to reach, specifically?</p> <p>What do you know about their current awareness, perceptions, beliefs, and motivations related to your purpose?</p>
3	<p>Your measure of success: How will you know if the communication effort worked?</p> <p>What specific goals or metrics do you expect to accomplish through your investment?</p>

You'll likely save time and money, and avoid confusion, if you have a solid handle on these questions before talking with a potential communication consultant. Of course, the best consultants may help you sharpen your responses.

If you don't know how to begin to answer these questions, don't fret – you can hire a consultant to help you figure it out! A communications planning consultant can help you translate organizational goals and approaches into a set of communications strategies and tactics, with each tactic defined in ways that answer the questions above.

Alternatively, you can include a strategy formation/planning component in any individual communication project you undertake, engaging your consultant to help you think through possibilities and focus on particular aims and audiences.

In any case, the consultant you select will need to be up to the task...

It requires a clear choice

What expertise do you need?

Not every communications professional can do every type of communications.

For example, it might be a mistake to assume that:

- The person who created your logo can create your website
- The person who wrote your annual report can write your marketing plan
- The person who ran your fundraiser can run your social media program

Of course, many communicators are skilled in more than one discipline. But, like any industry, the communications arena includes a variety of job types and talents. There are graphic designers, copy writers, strategists, project managers, journalists, photographers, videographers, event specialists, illustrators, public relations agents, and many others. Any of these roles might be further specialized by type of media – some people are expert in print, broadcast, or digital platforms.

When hiring a full-service communication firm, primary responsibility for fitting precise professional disciplines and experiences to your needs falls to the agency. When hiring independent contractors or small firms, it's up to you to be sure that the people you are considering have the training and skills you need.

ASK: *What are your professional strengths? What is the best project you ever worked on – and what was your role or contribution? What have you done recently that is most like what we need? Would this project tap into skills that truly represent your expertise?*

Some practical considerations

Here are several topics worth addressing as you engage a communication consultant.

TALK ABOUT TRUST

While belief in the character and capability of a professional services provider is important to your decision to hire any consultant, its importance might be heightened in the communications arena. Communication consultants are vital agents in helping your organization portray its identity and values to your audiences. Their work conveys the personality and priorities of your organization.

Communication consultants need to be in sync with the clients they serve. And you need to be fully confident that you are picking people and firms that you can count on to learn your enterprise – its mission and ambitions, its audiences and major lines of work, its style and approach – and to help you put forward communications that serve your interests in ways you can be proud of.

Look for consultants who “get our organization” and demonstrate curiosity and desire to understand what makes you special. And talk about your desire to be in a relationship with professionals you can trust to help you always present an accurate and positive image.

KNOW WHO SPEAKS FOR YOU

If you are contracting a communications professional or agency to help your organization gain visibility through public relations, be clear on whether and when any contracted party will represent your organization in the media.

Address these questions: Which specific individuals are authorized to speak for you? Under what circumstances and with whom? What approved talking points and messaging themes will be used in any such public representation?

OWN YOUR CONTENT AND ASSETS

Ask your consultant to sign a confidentiality agreement, ensuring that any internal documents or information shared remains the property of your organization and cannot be cited or distributed in external communications without your permission.

Establish in writing that any products or outputs generated through the consultant's efforts in this engagement are owned by your organization in perpetuity for unlimited use at your discretion.

Establish in writing and follow through at the end of the project to ensure that all pertinent digital files and documents generated by the consultant in the course of this engagement are transferred to your organization.

START WITH CLARITY ON SOFTWARE

Consider and plan for continued use, and potential future adaptation, of files created for you by the consultant. For example, will you be applying new graphic templates created with InDesign software? Updating PowerPoint presentations?

Assess and agree on software choices at the outset of the engagement, ensuring that your organization has or can readily acquire any needed licenses, and (most importantly) has trained staff who can work with any software and files the consultant will be leaving with you.

Similarly, if the consultant may recommend or use typographic fonts that are outside of your organization's current brand standards, make sure you know if there are special costs involved in acquiring those fonts for ongoing use by your staff.

BOB TOBIN, WILLIAMS GROUP

Bob Tobin is president of Williams Group, a strategic communication firm serving clients in the corporate and philanthropy sectors.

He consults with a variety of private and public organizations, as well as nonprofits. His areas of specialty are strategic planning, marketing, brand positioning, and communications program design. He has designed and led a variety of communications capacity building efforts with nonprofit entities.

Bob is engaged as a consultant, speaker, trainer and facilitator; he is a featured presenter at a variety of association meetings and conferences. Bob and the Williams Group team have been a lead communication resource to the S. D. Bechtel, Jr. Foundation since 2014.

He joined Williams Group in 1984 following five years in local government. Bob has a B.A. and a Master of Public Administration from Western Michigan University.

WORKING WITH CONSULTANTS SERIES

Consultants support the effectiveness of nonprofit agencies and grantmakers in many ways and on many levels. Aligning the right consultant with an organization's need, budget, and work style can generate significant benefits for all involved. Based on lessons we've learned as well as the experiences of grantees we support, the S. D. Bechtel, Jr. Foundation offers resources for working with consultants. This series features a guide for helping organizations take steps to find, hire, and manage a consultant. It includes essays on working with consultants who specialize in high-interest topics: strategic planning, communications, evaluation, and fundraising.

See the full series online at sdbjrfoundation.org/effectiveness/consultants



Start by reading this tutorial featuring nine steps to hiring any consultant. It's accompanied by a set of frequently asked questions.



View these essays when engaging consultants to support specialized needs.



Use this guide to develop a Request for Qualifications from consultants.