

2025 Financial Management Conference

Managing Consultants – The Consultant’s Perspective

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STRENGTHMATTERS®



Continuing Professional Education (CPEs) Requirements for CPAs

- Please find the **SESSION HOST** to **SIGN IN** at the beginning and **SIGN OUT** at the end of every session. We use that attendance log to verify your participation for CPE credits.
- Please **submit all conference evaluations**. Evaluation links are emailed to registrants daily. The session host monitoring the sign-in process has paper evaluations if you prefer.
- For more information on CPE credits, contact Lindsay Wells at consult.lwells@gmail.com.

Agenda

- Welcome & Framing | 5 min
- When and Why to Hire a Consultant | 15 min
- Selecting and Structuring | 15 min
- Managing for Results | 15 min
- Project Life Cycle & Exit Strategy | 20 min
- Audience Q&A | 10 min
- Wrap up | 5 min

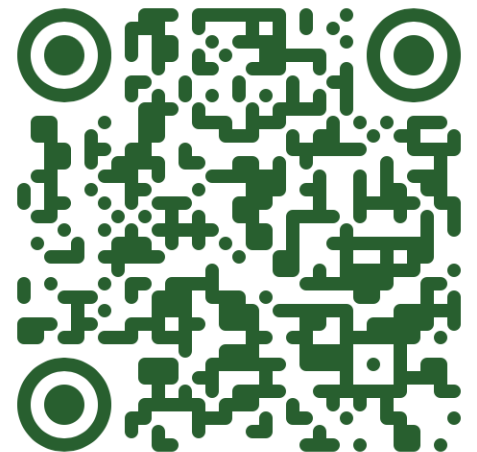
Poll 1: When and Why to Hire a Consultant

1. *What's the #1 reason you've hired a consultant in the past?*

- *Specialized expertise not available in-house*
- *Temporary capacity boost*
- *Independent assessment / objectivity*
- *Required by funder or external mandate*
- *Other*

2. *What's your biggest challenge when working with consultants?*

- *Scope creep*
- *Cost control*
- *Deliverable quality*
- *Implementation follow-through*
- *Communication gaps*



When and Why to Hire a Consultant



Poll 2: Selecting and Structuring the Engagement

When selecting a consultant, which factor matters most to you?

- Relevant experience
- Cultural fit with your team
- Cost/value balance
- Recommendations or reputation
- Proposal clarity and responsiveness



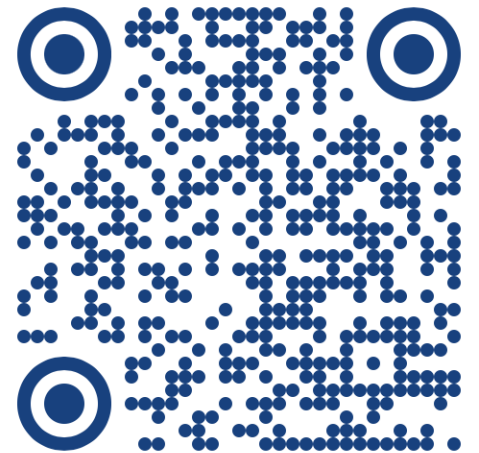
Selecting and Structuring



Poll 3: Managing for Results

How often do you formally review consultant performance during a project?

- Weekly or more
- Monthly
- At milestones only
- Rarely / never
- Not sure / varies by project



Managing for Results



Project Life Cycle & Exit Strategy



Audience Questions



Wrap Up & Takeaways

- Hire for expertise, fit, and timing.
- Define scope, metrics, and budget early.
- Manage actively and review thoroughly.

Evaluation Reminder

- Please submit all conference evaluations.
- Look for the electronic evaluation link in your email.
- Contact consult.lwells@gmail.com if you do not receive the link.

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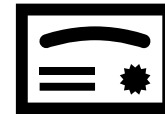
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