

# Tips for Selecting an EH&S Software Consultant

by Jill Gilbert

**Jill Barson Gilbert, QEP**, is president of Lexicon Systems, LLC. E-mail: jbgilbert@lexicon-systems.com.

Characteristically, enterprise resource planning software projects take longer and cost more than expected, and the organizations that implement them do not realize all of the expected benefits.<sup>1</sup> Similarly, enterprise environment, health, and safety (EH&S) management information systems projects can take several person-years of effort and carry a hefty price tag, with no guarantee that stakeholders will reap benefits from the new system.

Enterprise EH&S projects often involve third-party EH&S subject matter experts, software vendors, training providers, and other resources. Managing these third-party relationships effectively is fundamental to project success. If you need an EH&S software consultant, how do you qualify and select one?

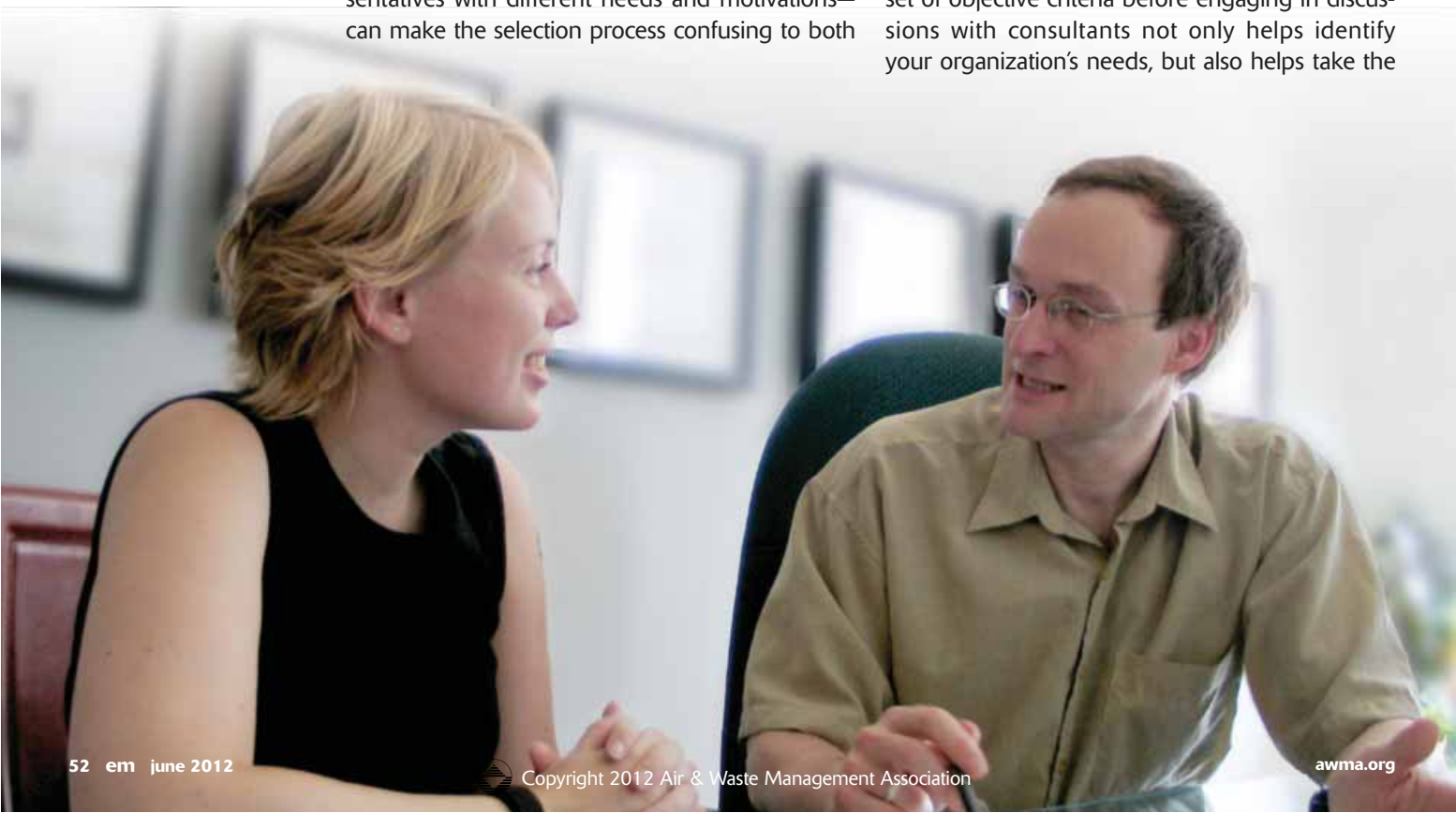
## Tips

**Identify decision-makers.** Who makes the decision to select the EH&S software consultant? Is it an individual, say the vice president of EH&S, or the chief information officer? Is it a group decision? “Groupthink”—where the group of decision-makers may include EH&S, business, IT, and other representatives with different needs and motivations—can make the selection process confusing to both

the organization selecting the consultant, and the consultant.

**Form a small selection team that represents stakeholders.** The team needs the clout to elicit input from the greater group of stakeholders, the authority to speak for the stakeholders, and be free of individual agendas and biases. The team needs to be small enough to be able to reach a consensus that the company can live with, agile enough to address challenges quickly.

**Develop a set of objective consultant selection criteria up front, and adhere to them.** Having a set of objective criteria before engaging in discussions with consultants not only helps identify your organization’s needs, but also helps take the



emotion out of the equation. The selection criteria are perhaps the most important deliverable.

**Get to know the consultants before engaging them in the project.** Take several opportunities to chat with the consultants before issuing a Request for Information (RFI) or Request for Proposal (RFP). By the time you issue the RFP, you should know that the consultants invited to provide a proposal are qualified, and you are comfortable working with their company. Do not send a “blind” RFP, as this only muddies the water. You will get all sorts of responses from serious contenders, as well as curiosity-seekers.

**Be specific about your needs.** Develop the RFI/RFP so that you can make sense of the information that you get in return. What are you asking the consultant to do? Do you need someone to facilitate the process? Serve as project manager? Lend a few sets of extra hands? What type of resources do you expect the consultant to provide? EH&S subject matter expertise and/or IT expertise? What level of experience do you need and expect? Do you need to achieve particular milestones by specific dates? What do you expect of the consultant?

**Make good use of your time and the consultant's time.** Competitive bids can be good, if the process is fair, objective, and unbiased. However, do not request information just for the sake of information. If your organization prequalifies a firm that can meet your needs, do not engage additional bidders just to satisfy a purchasing or supply chain requirement. It is not fair to ask additional firms to waste their time and effort to prepare bids.

## Selection Criteria

**Business knowledge.** EH&S IT projects extend into the entire business, involving more than EH&S subject matter experts. Your software consultant should know a lot more than EH&S issues. An important consultant selection criterion is how well does the consulting firm's leadership understand the position of the business in a global market, your industry, EH&S issues, IT issues, and the EH&S software market forces?

**Project scope definition and management.** Many firms have technical talent—EH&S subject

matter experts and IT experts—but in many cases, these firms lack project management skills. Can they help you navigate the process from end to end? Is the company well positioned to manage such a large effort?

Does the consultant possess the skills to clearly define the project scope, schedule, and budget? Keep the project scope, schedule, and budget in line? Manage scope creep, while addressing critical changes that need to occur along the way?

**Project methodology and tools.** Ask the consultant to describe not only their technical and project management approaches, but also their methodology and tool sets. Does the consulting firm have a methodology that has proven successful on other projects? Can they show examples of completed work products? Do they have client references that are willing to attest to the methodology?

**Communication capabilities.** The complex, multi-phase nature of many EH&S IT projects opens the door for challenges and scope changes in every phase. Does the consultant have a combination of business savvy and communication skills to inform stakeholders of critical issues before they have a large impact on costs, timelines, and scope?<sup>2</sup> Will the consultant communicate issues as they arise, and recommend solutions?

**Objectivity.** Large, complex IT projects may call for a trusted advisor, an outside party to be the “voice of reality.” Does the consultant have your best interests in mind? Is the consultant independent and objective? Is the consultant allied with one or more software vendors?

You can enhance your organization's chances for EH&S IT project success by careful and thoughtful consultant selection. Success comes from partnership, rather than conflict, with vendors.<sup>3</sup>

If you decide to engage an EH&S software consultant, be sure to perform due diligence. You should not expect your EH&S management information systems consultant to walk on water, but you should expect them to know where the stepping stones are... and let them lead the way! **em**

## References

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