

30 Questions You Must Ask Your Data Consultant Before Hiring Them

Key Questions to Ask at the Outset of a Data Initiative

General

- What are our most critical business questions that can be answered with better data visibility?
- Do we have a standard definition for key business metrics that is widely available and understood across the organization?
- How do we currently track performance against key metrics?
- What are our reporting requirements for key stakeholders?
- What is the scope of need for our data project?
- What is the project approach? Is this a one-off improvement/quick win or an enterprise-wide transformation project? Or does the project require a dual track approach?
- Do we have budget approval or will this require external input?

Technology

- Where does our organizational data reside? How many sources? What is the volume?
- What core management applications and systems (CRM, ERP, FP&A, etc.) are we currently using? What level of integration exists between these systems?
- How much data resides in these core systems vs. non-core systems such as Excel?
- At what frequency do we require access to our most critical data?
- Do we have an existing form of centralized data storage (data lake, data warehouse, data mart, etc.)? If yes, is this self-managed or managed externally?
- Do we expose our data externally to customers or stakeholders? Will they require restricted access?



Team & Resources

- Is there a role or individual internally with knowledge of the historical choices and system design?
- What feedback systems exist to incorporate lessons learned in order to enhance and evolve data tools and processes?
- Are there designated application and system owners who can own the data discovery, process improvement, and documentation process over the course of the project?

Key Questions to Ask to Evaluate and Select a Vendor

Expertise & Experience

- Does the vendor have the requisite experience/resources across the data/technology stack?
- What experience does the vendor have in our industry or business function?
- Is the vendor well-suited for the project approach – enterprise-wide transformation, one-off improvement, or a dual track approach?
- What is the cost model? Is it based on time and materials or a fixed fee?
- What is the timeframe for the engagement? And what are the expected deliverables?
- What are the phases (discovery, solution development, testing, etc.) to expect during the engagement? What is the duration of each phase?
- Does the project require ongoing maintenance and support? Will the vendor provide this?

Collaboration & Communication

- Is the vendor a good cultural fit within the organization?
- Will they be well aligned with the project principals?
- What is the vendor's communication plan? What is the expected communication cadence with the team and key stakeholders?
- What level of support – remote, onsite (circumstances permitting), and ongoing – should we expect?
- What is the vendor's quality assurance (QA) and user acceptance testing (UAT) process? When should we expect this?
- What is the vendor's knowledge transfer and team enablement process?
- What resources do they typically leverage in this process? Should we expect training, workshops, and other facilitation-based engagements?

