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Let’s Talk About Your Change Challenges[**Schedule Your Intro Call**](https://calendly.com/ocmsolution/introductory-call)No pressure. Just a conversation to understand your needs and discuss practical solutions.

**Checklist to Choose the Right Change Mgt Consultant or Lead**

Use this checklist to guide your process of finding and hiring the right change management consultant or change management lead. It outlines exactly what to look for, the right questions to ask, and how to evaluate potential consultants step by step.

# Step 1: Preparation

☐ Define your change initiative (scope, size, and goals).

☐ Identify internal stakeholders and leadership sponsors.

☐ Clarify what success looks like (adoption, performance, cultural impact).

☐ Determine your budget and timeline for consulting support.

# Step 2: What to Look for in a Consultant/Lead

☐ Proven experience with similar change initiatives and industries.

☐ Strong knowledge of change management frameworks (Prosci, ADKAR, Kotter, etc.).

☐ Ability to adapt methodology to your organization’s culture.

☐ Excellent communication and interpersonal skills.

☐ Demonstrated results with adoption, engagement, and performance metrics.

☐ Positive references and case studies from past clients.

# Step 3: Questions to Ask Potential Consultants/Leads

☐ What types of change initiatives have you managed before?

☐ How do you customize your change management approach for different organizations?

☐ How do you build employee buy-in and overcome resistance?

☐ How do you measure ROI and long-term success?

☐ What role do you expect leaders and managers to play in the process?

☐ Can you provide examples of sustainable change results from past clients?

# Step 4: Evaluate and Compare

☐ Rate experience and industry knowledge.

☐ Assess methodology clarity and flexibility.

☐ Evaluate cultural fit with your organization.

☐ Compare cost vs. value delivered.

☐ Review references, testimonials, or case studies.

☐ Rank consultants/leads and make a short list of top candidates.

# Step 5: Make Your Decision

☐ Ensure alignment on project scope, deliverables, and expectations.

☐ Confirm communication style and reporting frequency.

☐ Validate how success will be measured and reported.

☐ Finalize engagement terms and sign agreement.

☐ Introduce consultant/lead to internal leadership team and stakeholders.

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