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Checklist to Select the Right Consulting Firm

Step 1: Narrow the List (Pre-Screening)

Before interviewing, use these filters below to bring the list down to 2–3 firms.

- Industry Fit** → Does the firm have experience in your sector (e.g., finance, healthcare, technology, public sector, manufacturing, engineering, digital, etc.)?
- Project Type Fit** → Have they managed similar types of projects (e.g., SaaS, ERP, CRM, process changes, HRIS/HCM, AI, Data, M&A, digital transformation, culture shifts, business transformation, cost reduction, compliance projects, etc.)?
- Geographic Presence** → Do they operate in your region?
- Delivery Model** → Do they have a defined consulting delivery model that is adaptable to your organization’s culture and business? (For example, the [Airiodion Group 4-Phase Scalable Framework for Business Change and Projects](#))
- Scale & Resources** → Do they provide customized hands-on tactical and strategic support?

👉 This step should leave you with 2–3 strong contenders to interview.

Step 2: Interview the Shortlist

During the interview, ask these core interview questions — and here’s why they matter:

- Can you share examples of projects like ours?

Why it matters: Tests relevance — ensures they have experience in your industry or project type.

How do you adapt your methodology to different organizational cultures?

Why it matters: Great consultants tailor frameworks; weak ones use one-size-fits-all.

What do you see as the biggest risks to adoption in a project like this?

Why it matters: Reveals whether they anticipate resistance and proactively manage risk.

How do you measure success and ROI?

Why it matters: Separates firms who focus on business outcomes from those who deliver fluffy presentations.

What role will our leaders and managers need to play?

Why it matters: Good consultants know change requires leadership ownership, not just consultant effort.

How do you build employee buy-in and address resistance?

Why it matters: Adoption lives or dies at the employee level — their answer shows how people-centric they really are.

Who will actually be working with us day to day?

Why it matters: Ensures you're not sold by partners but serviced by junior staff.

Can you provide case studies with measurable results?

Why it matters: Proof that their approach leads to tangible, sustained impact.

Step 3: Evaluate & Compare After Interviews

Score each firm on experience, methodology, cultural fit, communication style, and cost/value.

Request sample deliverables (change impact analysis, communication plan, adoption metrics).

Look for chemistry — which consultant 'clicked' with your team and leadership?

Step 4: Make Your Decision

- Confirm project scope, deliverables, and timeline.
- Define how success will be measured (adoption, ROI, cultural alignment).
- Finalize contract and ensure terms include knowledge transfer, not just short-term delivery.

 Pro-Tip: Choosing a change consultant isn't about who has the flashiest slides or biggest brand name, it's about who understands your people, your culture, and your goals.

The right consultant will make change stick long after they leave.

Questions? Need help? Let's talk
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