

Why work with a consultant through the integration process?

Working with consultants can be very beneficial to organizations considering an integration. It is important to find consultants that are a fit for your situation, leadership style, and budget. The table below outlines some benefits of working with a consultant and some things to expect during the 4 phases of the integration process.

Any integration project requires a significant amount of work and time. This work will be on top of people's existing job responsibilities, so unless you have someone internally or want to create a temporary internal position, working with consultants is a good option.

In order to find a consultant that is suited to your organizations and integration project clarify exactly what you require for this project. Understand the scope of work and experience you are looking for and invite detailed proposals. Look for a consultant or team of consultants with:

- Change management knowledge
- Project management experience
- Facilitation skills
- Availability
- Integration knowledge and experience
- Meets your budget goals

Review the proposals and interview potential consultants to ensure they have the experience required and will fit within your culture. Once you have selected a consultant, ensure you establish a contract that includes a communication schedule, milestones, and workplan you are both comfortable with.



No matter how brilliant your mind or strategy, if you're playing a solo game, you'll always lose out to a team. ~ Reid Hoffman, Co-Founder of LinkedIn



Phases	Benefits of working with a consultant	What to expect from a consultant
<p>Phase 1 - Exploration</p>	<ul style="list-style-type: none"> • Consultants are viewed as impartial by stakeholders and this can result in more open dialogue in this beginning phase. • Consultants can help bridge the gap between the two organization's board of directors, offering practical support to these groups of volunteers. • Consultants can facilitate the conversations between the organizations so that all concerns are heard and timelines are kept. • Consultants can provide logistical support to the conversations and process during this phase. 	<ul style="list-style-type: none"> • The consultant should be given access to organizational documents and information • A facilitated set of meetings and conversations • A final report, based on your specific organizations, about the best model of integration for you.
<p>Phase 2 - Planning for Integration</p>	<ul style="list-style-type: none"> • Consultants can helpful in balancing power dynamics between the organizations. • Consultants can advise on realistic project timelines and develop work plans based on their experience with other integrations. 	<ul style="list-style-type: none"> • To involve stakeholders from both organizations in facilitated meetings and conversations to develop the implementation plan. • An implementation plan based on the integration model and your organization needs.
<p>Phase 3 - Implementation</p>	<ul style="list-style-type: none"> • Consultants can provide project management support and coordinate policy, procedure, and practice integration • Consultants can facilitate individual or group conversations with stakeholders about the change • Consultants can provide resources and communications to make the integration process go smoothly 	<ul style="list-style-type: none"> • To highlight areas of the implementation that are not going smoothly or where there is misalignment between the organizations • Provide support to leadership in implementing the integration plan • Advise on the creation of new policies and procedures, human resources structures, and operational practices
<p>Phase 4 - Post - Integration Health Check</p>	<ul style="list-style-type: none"> • Consultants can provide support to address areas of the integration that have not gone as expected. • Consultants can help evaluate the entire integration process. • Consultants can help the team stay motivated and engaged over the course of the entire project • Working with the same consultant can maintain the project knowledge if stakeholders move away from the organization. 	<ul style="list-style-type: none"> • A final project report that summarizes key learnings, and makes recommendations to address any challenges. • Provide coaching to the leadership to move the new organization forward and manage changes