



Getting the Most from a Technology Consultant

A white paper by Tom Atkins



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C R E A T I V I T Y , C O M M U N I C A T I O N A N D C L A R I T Y



This white paper is the result of nearly 30 years watching Universities, Companies, Broadcasters and others use technical consultants to help develop media intensive facilities. I have worked in nearly every aspect of the professional video business – with dealers, systems integrators, manufacturers and as an end user. I have been part of the developments of literally thousands of systems, ranging from post production edit suites to University AV facilities, to turnkey HDTV conversions of Television stations to media asset management systems to centralcasting.

During those three decades, I have seen extraordinary success stories and horrific nightmares in consultant led projects. More importantly, I have seen patterns that led to both the success and failures. Recent research has echoed the patterns I have noticed, and this paper outlines them.

When to bring a consultant in.

The NSCA (National Systems Contractor’s Association) is the national organization for systems integrators of video, audio and other media systems. In research commissioned by the NSCA, the organization took a hard look at when consultants were brought into a project, and how that affected the overall project.

The results showed that consultants are typically brought into a project at several key junctures:

- During architect selection 24%
- During Schematic Design phase 27%
- During design development phase 26%
- During RFP phase 1%
- After Building is under construction 22%

When do consultants think they need to be brought in to do their best work? The picture is a little different. Consultants said the ideal time was....

- During architect selection 62%
- During Schematic Design phase 27%
- During design development phase 14%

The reasoning here is simple. The further along a project is, the more vested in ideas, concepts and design all the partners in the enterprise are. If a consultant is part of the initial design team, there are less changes in the design late in the game (which means less architectural and design change costs). And there is less conflict in the design

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process. The elements needed to support the A/V or broadcast facility are introduced early in the process. The elements needed to support the A/V or broadcast facility are introduced early in the process.

Who should the consultant work for?

More times than not, institutions or companies building a new facility do not budget for a A/V or broadcast consultant, counting on the architect to help them sift through design issues related to the media portion of their project. Most architects have relationships with one or more consultants that they use for their projects and can easily bring these people into the project team.

Who should the consultant work for? The institution or the architect? There are some pros and cons to both approaches.

Since many institutions do not have a separate budget item for a consultant, bringing one into the project through the architect is easy financially since an hourly billing process is already in place with the architect. The consultant can be folded directly into the architectural financial structure.

And since most institutions don't have a consultant already, and often don't know where to find one or how to evaluate one, they can lean on the architect's experience, and know they are getting someone with experience and with a proven track record.

And too, since the architect already may already have a relationship with the consultant, there is a communication and work process already in place. This means time is not spent with the two learning how and what each other needs in the early phases of the project. The consultant knows how to format his work to work with the architect's work flow and technical needs. And the consultant knows how to develop RFP documentation that is consistent with the documentation used by the architects.

There may be times however, when it makes sense for the institution to have the consultant work directly for them. When does this make sense?

- *When media (A/V or Broadcast type media) plays a central role in the building or a section of the building.* In this case, you might well want someone who will help you design something beyond the generic electronic classroom or auditorium.

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- *When you want an advocate for the Institution's media needs on the design committee.* If the consultant works for the architect, his first loyalty contractually, may be to them and to their design, and secondarily to the users of the media systems.
- *When you need someone to help your people sift through technology and needs to develop an accurate equipment list and budget.* If you need guidance on technologies that make sense for your goals, you may want the person to work directly for you, not for the architect. Often architects' consultants do their work with minimal contact with your own end users. Someone who works for you directly, however, will typically spend more time with your people, their needs and their concerns before ever developing a design.
- *When you plan to bid the media equipment out separately from the building.* Many institutions building generic electronic classrooms will have the equipment and systems for those classrooms bid out as part of the construction documents. But if your intention is to bid the media equipment for your classrooms, TV studios, as a separate RFP, having a consultant work for you means you can easily have them work with your people to develop that RFP, and to evaluate responses to the RFP.
- *When you need someone to project manage the media portion of the project.* Project management of media technology projects is a specialized field, and most construction companies are not focused on media. Having a person act directly on your behalf to manage RFP evaluation, installation and proof of performance goes beyond what your architect's consultant probably does. Also, an architect's consultant is often bound by the communications protocol and hierarchy of the construction company, and resolving issues with your systems integrator can often take time to go through those protocols, whereas a consultant who works directly for you can speak directly to the integrator and resolve those same issues quickly.

In short, if you need work beyond the scope of helping the architect create building designs and subsystems to match the media, it might make sense to have the consultant work directly for you. You might be able to hire the architect's consultant to do extra services, which would have certain benefits in terms of communications within the whole project. Or you may want to choose the consultant and ask the architect to fold his costs into his contract.

Keep in mind also, that if you need some of these special services from a consultant, but need to fold their services under the financial umbrella of the architect, it might well be possible – but you should let the architects know what additional services you want from your consultant before you have them bid the project, so they can build that into the

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budget, or pick a consultant with the right skill sets. Otherwise you will end up either... not getting the services, or paying unexpected extra fees for the services.

Key issues in choosing a consultant/project manager

There are five key elements in choosing an consultant or project manager for a media intense facility. Careful attention to these issues will help you make a good choice in consultants. These issues are:

- Past Projects
- Core Competencies and Strategic Partners
- Communications Process
- Documentation
- Flexibility

Past Projects

Ask potential consultants about past projects. Learn what they have done, how large the projects were, and what their roles in those projects were. Is your project in the size that they have done before? Technology is always changing, so don't expect them to have done precisely what you are doing, but do look for good matches. Don't make the mistake of hiring an A/V consultant for television studios for instance. (Don't laugh, it happens!). If the consultant has worked only for broadcasters, he might not be the perfect guy to work with a university, whose culture and mission is very different than a TV station. Look for either... a) specific matches for your project, or.... b) evidence of a broad scope of projects and experience.

The broad scope has a strong advantage, as it brings in ideas and workflows from many different operations, and offers you the most complete package, not just someone who has only worked in one field, and has a limited field of vision to draw on.

Look for someone who has worked with multiple vendors and manufacturers – this experience will assure that he can help you evaluate an RFP and select the right vendor for your project.

Core competencies and Strategic Alliances.

Have them tell you what they do well. And listen for what they leave out. No one does everything well, and they should be able to articulate their skills, and give you examples.

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If you have specific tasks you want them to do for you, then ask how they would normally set about those tasks. Ask about how they make decisions and what key factors they focus on in their designs, and why.

With a few exceptions, most consultant firms are one or two man shops, not large multi-disciplined firms. They all depend on a network of talented individuals and companies to help them fill in the blanks of their knowledge and abilities. This can save you money – you are not paying for skills you do not need. But still, you want to know that they can provide anything you need. So ask your potential client about their strategic alliances, and the skills and projects they bring to your project.

Communications Process

One of the themes that ran throughout the NSCA study was the value of communications. In my nearly 30 years experience, nearly every good project I have been associated with was marked by excellent communications processes. And nearly every nightmare project was marred by poor communications.

A quality consultant has already developed processes to enhance communications. They will be pro-active and consistent in their communications, and should have a clear sense of who needs to get what information. Ask potential consultants about their communications process, and learn first-hand how they deal with communications issues, and what they do to assure the right people are “in the loop.”

Documentation

A Media project goes through several phases – from brainstorming to research to design to implementation. Each phase builds on the next and good documentation is a key making good decisions. And in the cases where you need to backtrack an issue, documentation is essential.

By good documentation, I am not just talking about diagrams and drawings. I am talking about notes, information from your own people, research on products and manufacturers, as well as various versions of designs and budget. Ask how they keep track of the huge array of information that comes in on a project, how they organize that information, and what they do with it after the project is done.

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Flexibility

A consultant is going to have to interact with several key players in any project. The institution itself, the architect, the builder, as well as the various systems integrators and contractors that might be involved in a project. Each of these players will have their own corporate culture, their own processes and their own information requirements.

The best consultants are flexible enough to work effectively with all these team members, and can shift their own processes and ways of working to accommodate them. This is not something you can ask directly (What consultant is going to tell you to your face “it’s my way or the highway?”). What you can do is listen closely to them tell about their projects, who was part of the project teams, how they worked together, and how they adapted to the different situations and organizations involved.

A new building or facility will often take years from inception to construction. Media technology, both in A/V and broadcast, changes as fast as computer technologies. What this means is that often equipment and systems designed into the facility at the early stages may be completely obsolete by the time construction is underway. How does your consultant deal with that? Ask!

Consultants can save you a lot of money, time and frustration, but....

Anyone who has seen a lot of projects over time will tell you the same thing: A good consultant, brought in at the right time, will save you money, time and frustration. I can point to documented projects that indicate that for every dollar you spend in a good consultant early in the process, your institution will save 2-3 dollars of re-work, re-design and last minute change orders in the overall project.

The re-work, re-design and change orders also translates into time. As I write this, I am finishing a university project that had no consultant at the outset, and the delays caused by the building re-working necessary to make the TV facility functional has now amounted to over 3 months delay, not to mention huge cost additions.. This is NOT an aberration.

Last of all, good media facility consulting, early in the process, reduces the frustration of systems that don’t meet the needs of the people actually using the building.

If you are going to get the best value for your consulting dollar – take the time before you begin meeting with a consultant to list exactly what you want them to do. This allows

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them and you to make a good judgment on whether this is a good fit. Create a scope of work that they can address in their discussions with you. This will allow them to give you more accurate assessments of the time and money their services will cost. Take a look at your own corporate culture, so you will have a sense of what kind of person or organization will mesh best with your needs.

Whether you are an architect, a facilities manager, a university dean, the head of a construction committee, or a project manager, choosing the right A/V or Broadcast technology consultant can be an important decision. It is my hope that this white paper will help you in that process.

A handwritten signature in blue ink, appearing to read "Tom Atkins", is placed above the printed name.

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