

Many people claim to be “Consultants” or “Technology Designers” some even claim to be Electrical Engineers that have “specialized in technology.” While this group clearly does include skilled independent consultants, it also, unfortunately, contains others who may not provide the same level or quality of service. The waters are muddied further by manufacturers, vendors, and contractors claiming to offer “consulting services” – these all have a clear conflict of interest. This checklist will help you evaluate a prospective technology design consultant.

Is the potential consulting firm truly independent?

___ YES ___ NO

It is vital that your consultant be completely independent. Some vendors and contractors will offer “consulting” or design services, and some “consultants” will sell or fabricate products or perform installation services – **BEWARE!**

- Anyone who sells equipment has a vested interest in selling **certain** products. *Your technology consultant should select products and technologies that are in your best interest – not theirs.*
- No one who performs installation services is in a position to objectively review the quality of the installation, or perform acceptance on the installed system – they are certainly not in a position to identify and track deficiencies. There is no protection against product substitutions, unapproved design changes, or sub-standard workmanship. While a contract installer may be a person of integrity, they are also human. When placed under a high-pressure deadline, they may cut corners. When they discover they have underestimated the time and resources (this inevitably happens), they may try to cut back wherever they can to save.

Can the firm prove competency, are they certified?

___ YES ___ NO

As with architects and engineers, technology design consultants should be certified by a recognized industry body such as **ICIA** (International Communication Industries Association), **BICSI** or **NSCA**. Specifically, BICSI has the RCDD (Registered Communication System Designer), ICIA has a CTS-D certification (Certified Technology Specialist – Design) and NSCA has the R-ESI. To obtain these certifications, a consultant must have demonstrated in-depth knowledge of technology systems design during testing session which includes written, oral, and hands-on examination. They must also possess a significant amount of in field experience. The consultant must periodically re-certify either by re-testing, or through teaching or attending a certain number of hours of accredited industry workshops and seminars. These certification assure you that the consultant is a trained professional in the field of technology system design. *Is your prospective consultant certified by an independent, industry recognized body?*

Does the firm participate in industry associations?

___ YES ___ NO

Membership in a professional association indicates that your consultant takes their job and profession seriously. These associations provide a means for members to continually upgrade their professional skills. Many have stringent membership requirements, and a code of professional ethics which the member must subscribe to. Examples of such associations are: **IEEE** (Institute of Electrical and Electronics Engineers); **AES** (Audio Engineering Society); **BICSI** (Building Industry Consulting Service International); and **CSI** (Construction Specification Institute). *Is your prospective consultant a member in good standing of the appropriate professional associations?*

Is the firm aware of the National Cad Standard?

___ YES ___ NO

A proper design and specification includes professional drawings. When it comes to conveying the intent of a design, the saying “*a picture is worth a thousand words*” has never been truer! Some technology consultants don’t bother with drawings, some produce hand-drawn sketches, while others provide professional CAD drawings produced to international standards. Drawings should be produced in the **AutoCAD** standard format for easy interchange with architects and engineers and adhere to the National Cad Standard. *Ask to see samples of your prospective consultant’s drawings from previous projects.*

Is the firm aware of the revised MasterFormat?

___ YES ___ NO

Technical specifications should be produced to established standards to ensure the most efficient transfer of information. In a bidding situation, it is important that all specifications be in the three-part CSI/CSC (or equivalent international) format. *Ask your prospective consultant what format they use for their specifications, and ask to see samples of specifications from previous projects.*

Is the firm familiar with bid processing?

___ YES ___ NO

If your project is going out for bid (always a wise course of action), is the consultant familiar enough with bidding to guide you through the intricacies of the bidding process? Can your consultant prepare a front-end bid package and advise on supplementary conditions to the contract? *Ask your prospective consultant what to do if you receive only a single bid. Ask them what the procedure is if all bids received are over your budget.*

Can they provide web based document sourcing?

___ YES ___ NO

Your consultant's offices may be burglarized or destroyed by fire or similar catastrophe. What provisions has your consultant made to re-constitute your project drawings and documentation? A professional design consultant will backup all client data files to a secure off-site server on a daily basis – preferably located in another city. How are the large CAD files shared with internal and external teams? *Ask your consultant how they are protecting your project data in the event of a disaster and how they intend to share your project documents with all stakeholders.*

Can they provide complete assistance?

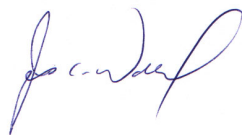
___ YES ___ NO

A project requiring audio, video, projection, and control components typically requires more than just system design. Your technology design consultant should also be able to:

- Prepare an accurate budget estimate of the *installed* systems in advance of bidding.
- Provide electrical, conduit, and mechanical requirements to the project engineers.
- Prepare or advise on front-end bid documents and construction contracts.
- Write a detailed technical specification that can be included in an overall project bid package or serve as a stand-alone document.
- Pre-qualify prospective bidders and evaluate bids – *this is where it is vital that your consultant be independent of manufacturers, contractors, and vendors or else a clear conflict of interest exists.*
- Review on-site installation, and solve arising technical problems and perform acceptance testing on your behalf – *how else will you know if the contractor's work is complete, up to spec, and performed to required standards of workmanship?*
- Provide technical project management and contract administration services for large projects.

Ask for a listing of your prospective consultant's capabilities and typical project methodology.

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James C. Waddell
CEO/President
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