



## How to find the right sourcing consultant

### Methods drive results

Hiring a strategic sourcing or supply chain consultant is a high-stakes decision because sourcing typically occurs at the enterprise level. So the business impact and the political exposure can be high. Your reputation rides on the results of the consultant’s results AND their methods.

The **results** may include cost savings, improved supplier performance, or process efficiencies. But the word “results” also implies that the realized value is sustainable, verifiable, implemented within reasonable cost and time, and aligned with corporate strategy.

The **methods** include considerations such as consulting tools and approach, change management—managing expectations upwards and aligning stakeholders all around—and teamwork. Methods also involve integrity, commitment, and curiosity. Can the consultant articulate your priorities—e.g., in terms of EBITDA—and will they give your organization top priority? Is the consultant a thought leader? Can they challenge assumptions constructively?

### Selecting the candidate

Below is a **checklist** you can use to vet a consultant’s capabilities. A text version that you can copy is provided at the end of this article.

<p><b>Functional Expertise</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Has significant experience leading or performing a diagnostic</li> <li><input type="checkbox"/> Led RFX processes across direct and indirect spend categories</li> <li><input type="checkbox"/> Performed spend analysis and developed category strategies</li> <li><input type="checkbox"/> Built cost models (TCO, should-cost)</li> <li><input type="checkbox"/> Used supplier segmentation and SRM methods</li> <li><input type="checkbox"/> Led high-value supplier negotiations</li> <li><input type="checkbox"/> Understands compliance and procurement controls</li> <li><input type="checkbox"/> Managed contract lifecycle</li> </ul> <p><b>Industry &amp; Category Knowledge</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Experience in your industry vertical</li> <li><input type="checkbox"/> Sourced in your specific spend categories</li> <li><input type="checkbox"/> Understands industry regulations and benchmarks</li> </ul> <p><b>Analytical &amp; Technical Skills</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Proficient in Excel/Sheets for analysis and modeling</li> <li><input type="checkbox"/> Used e-sourcing platforms (e.g., Coupa, Ariba)</li> <li><input type="checkbox"/> Built supplier scorecards or spend cubes</li> <li><input type="checkbox"/> Understands P2P and S2C processes</li> </ul> <p><b>Cultural Fit &amp; Work Style</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Works independently or in team, or can lead team</li> <li><input type="checkbox"/> Fits pace and decision-making style</li> <li><input type="checkbox"/> Understands internal politics and constraints</li> <li><input type="checkbox"/> Flexible and willing to get hands dirty</li> </ul>	<p><b>Strategic Thinking &amp; Problem Solving</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Developed category management plans</li> <li><input type="checkbox"/> Captured hard/soft savings with examples</li> <li><input type="checkbox"/> Transformed procurement function to strategic role</li> <li><input type="checkbox"/> Used market intelligence or benchmarking</li> </ul> <p><b>Communication &amp; Stakeholder Management</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Presented to C-level or key stakeholders</li> <li><input type="checkbox"/> Worked cross-functionally with internal teams</li> <li><input type="checkbox"/> Influenced decisions without direct authority</li> <li><input type="checkbox"/> Managed stakeholder alignment and change</li> <li><input type="checkbox"/> Has executive presence and thought leadership</li> </ul> <p><b>Results &amp; References</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Makes client outcomes the number one priority</li> <li><input type="checkbox"/> Quantified past achievements (e.g., cost savings)</li> <li><input type="checkbox"/> Delivered business value beyond savings</li> <li><input type="checkbox"/> Can provide references or case studies</li> </ul> <p><b>Commercial terms</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Available by calendar and timezone that you need</li> <li><input type="checkbox"/> Willing to travel</li> <li><input type="checkbox"/> Fees are within budget</li> <li><input type="checkbox"/> Willing to do a pilot or milestone-based engagement</li> </ul>
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**Table 1: Criteria for successful sourcing consultants**

## Validating the candidate

**How** you verify that this person has the necessary capabilities in a 20-40 minute interview is a different story. Here are some methods that may help:

- First, clarify your priorities: determine which of the criteria above are “make-or-break”.
- Use behavioral interviewing to ask for evidence that demonstrates the needed skills.
- Use a case study to assess skills on the spot. For example, ask “What are the components of a should-cost model and describe how you would build it in Excel?”
- Check for certifications (e.g., CPSM, CIPS, PMP, Six Sigma if relevant).
- Validate their consulting background via LinkedIn or referrals.

For the behavioral interview, ask the candidate to describe a past work experience that illustrates their capabilities:

- "Think of a project where your work effort demonstrates your expertise in [X]".
- "Describe the objective, approach, and outcomes of this past experience."
- "Describe specific actions and behaviors that you personally took to drive results."
- Listen for "I" vs. "we" to discern if the person was the performer or just a bystander.

One more note: A well-rounded strategic sourcing specialist should be able to lead a diagnostic. This includes interviewing, performing market analysis, building and analyzing a spend cube, and managing work streams. It's not a good sign if the interviewee does not bring up the need for a diagnostic, can't explain its benefits, or has no relevant experience.



Photo by Edmond Dantès: <https://www.pexels.com/photo/people-doing-thumbs-up-8553864/>

## Summary and closing thoughts

As you interview various candidates for a strategic sourcing or supply chain-related engagement, consider the following:

- First determine which capabilities are most important for your requirements.
- For comparability, use a consistent interview approach/ format.
- If you only have time for an interview, use behavioral interviewing and a case study.
- Look a demonstrated understanding of, and commitment to, client outcomes, and can articulate them in terms investors will understand, such as EBITDA.
- Check for the consulting "book ends": expertise in diagnostics upfront and experience designing for sustainability at the end.

Supply chain improvements can directly affect the income statement, the balance sheet, brand value, and even market cap. It's essential to know what you're driving for and to build the right team of experts who can get you there.

## Authorship

Peter Benda is a general management consultant specializing in strategic sourcing and supply chain management, front line productivity improvement, governance, and diagnostics. He has worked with clients in mining, utilities, manufacturing, financial services, transportation, defense R&D, federal and state agencies, and technology startups. He is an advisor to procurement AI startup, Axtom. He has published market research and holds several patents.

## Appendix: capabilities criteria

### Functional Expertise

- Has significant experience leading or performing a diagnostic
- Led RFX processes across direct and indirect spend categories
- Performed spend analysis and developed category strategies
- Built cost models (TCO, should-cost)
- Used supplier segmentation and SRM methods
- Led high-value supplier negotiations
- Understands compliance and procurement controls
- Managed contract lifecycle

### Industry & Category Knowledge

- Experience in your industry vertical
- Sourced in your specific spend categories
- Understands industry regulations and benchmarks

### Analytical & Technical Skills

- Proficient in Excel/Sheets for analysis and modeling
- Used e-sourcing platforms (e.g., Coupa, Ariba)
- Built supplier scorecards or spend cubes
- Understands P2P and S2C processes

### Cultural Fit & Work Style

- Works independently or in team, or can lead team
- Fits pace and decision-making style
- Understands internal politics and constraints
- Flexible and willing to get hands dirty

### Strategic Thinking & Problem Solving

- Developed category management plans
- Captured hard/soft savings with examples
- Transformed procurement function to strategic role
- Used market intelligence or benchmarking

### Communication & Stakeholder Management

- Presented to C-level or key stakeholders
- Worked cross-functionally with internal teams
- Influenced decisions without direct authority
- Managed stakeholder alignment and change
- Has executive presence and thought leadership

### Results & References

- Makes client outcomes the number one priority
- Quantified past achievements (e.g., cost savings)
- Delivered business value beyond savings
- Can provide references or case studies

### Commercial terms

- Available by calendar and timezone that you need
- Willing to travel
- Fees are within budget
- Willing to do a pilot or milestone-based engagement

## Keywords

#strategicsourcing #spendcube #procurement #EBIDTA #supplychain #hiring #interviewing  
#consulting

### LinkedIn Header:

If you're looking to hire individual consultants to lead or support a strategic sourcing, procurement, or supply chain engagement, here are some tips for making the right choice.