

# 10 Must-Ask Questions

## Before Hiring A Stock Plan Consultant

**TRUST:** Confident in knowledge and skills, trust in the person, and trust in the relationship

**TEAMWORK:** Collaboration and knowledge transfer, expertise, and competencies

### BACKGROUND & EXPERTISE

1

**Tell us a little bit about your work background. What stood out to you about this role?**

Gather a solid understanding if the consultant can make an immediate impact, bring fresh ideas and best practices to the table

2

**What are your areas of expertise?**

To find the right consultant, you need to define your problems and accurately understand what types of expertise are needed

3

**What do you think the biggest challenge might be? What would success look like for you in this role?**

Based on the consultant's background, gather an understanding if the consultant can handle similar challenges you face

### PROCESS

4

**Can you tell me about your process for going about work?**

The consultant should be able to demonstrate a strategy and process for achieving results needed

5

**How do you deal with tight deadlines? If something overwhelms you, how do you adapt?**

The most ideal answer might be a version of this: "review a list of tasks to analyze and prioritize what are the most urgent and critical matters

6

**What results have you achieved for your previous clients/issuers and how did you do it?**

When identifying the right consultant, you should ideally try to find someone who has been there, don't that. Has the consultant helped another client/issuer with the same problem?

### INTERPERSONNEL

7

**Tell me about a time when you and your team had a tough deliverable and how you approached this collaboratively.**

When hiring a consultant, he/she will need to interact with your team at some point. All the experience and expertise might prove to be inefficient if the consultant does not have empathy for your team.

8

**When conflict arises at work, how do you handle it?**

By asking questions related to conflict, you will get a better understanding of the consultant's interpersonal skills and personality. You will also get a sense of their ability to resolve and deal with conflict at work.

9

**Could you briefly describe how you handled a difficult work-related situation in the past?**

The consultant should be able to think on their feet to help navigate things that might not always go as planned

### BONUS

10

**Do you have any questions for me?**

The more interesting and passionate consultants will most likely have a wide variety of questions they wish to ask.

There is no **"one-size-fits-all"** when it comes to stock plan administration. To find your ideal consultant, match your needs with their **skills** and **expertise**.

If you want to send these questions to Stock & Option Solutions, we can help.

Schedule your no-obligation consultation today! >>>