

## CHOOSING A PROFESSIONAL

The professionals you work with, whether a forester, accountant or estate attorney, will guide you through their world of knowledge to help accomplish your goals. Your ability to articulate your goals, the professional's ability to listen, understand, and interpret those goals into appropriate actions, and your supervision of their work will determine your satisfaction with the product. Rapport between you and the professional are also important in attaining a satisfactory result.

A professional who contacts you about providing services may not always be the best option for accomplishing your goals. Contacting and interviewing at least 3 professionals in the field with which you need assistance, will help you find the best match for your needs. The following steps will help you collect enough information to make an informed decision about who to hire.

1. Identify your goals for working with a professional. What do you want to accomplish? What are your priorities?
2. Obtain a list of available professionals in your geographic area.
3. Talk with friends and family members who might have goals similar to yours and get recommendations about professionals with whom they have worked.
4. Use the information collected to identify at least 3 professionals who might be a good fit.
5. Contact those professionals and gather the information below:
  - a) **Credentials:** education, experience, licensing/certifications, professional affiliations, recent continuing education.
  - b) **Professional philosophy:** what are their goals when working with clients; with what type of clients do they like to work with most; why did they get into the profession and what has made him/her stay?
  - c) Describe your **goals**, and ask if they have worked with other clients who had similar goals.
  - d) Request 1-3 **references** who have similar goals/situations, with whom you could talk. Foresters may be willing to show you a management plan they've prepared, or walk you through a property they've managed over time.
  - e) Discuss **fees** charged for the type of work in which you are interested. If there are no fees, be sure you understand who pays the bill and how that might affect the professional's recommendations.
  - f) Discuss their **availability** to do the work and the timeframe to complete it.
6. Contact the references for those professionals still under consideration, get a feel for the professional's traits, including:
  - a) Reliability
  - b) Responsiveness
  - c) Communication skills: listening and speaking
  - d) Quality of work
  - e) Assessment of associates of the professional (loggers, truckers, office staff, assistants,...) who will likely work on your project.
7. Complete the following grid to compare the professionals and make a decision.

## **PROFESSIONAL ASSESSMENT GRID**

<b><u>TRAIT</u></b>	<b><u>PROFESSIONAL #1</u></b>	<b><u>PROFESSIONAL #2</u></b>	<b><u>PROFESSIONAL #3</u></b>
<b>CREDENTIALS</b>			
<b>PROFESSIONAL PHILOSOPHY</b>			
<b>EXPERIENCE WITH YOUR SITUATION</b>			
<b>FEES</b>			
<b>AVAILABILITY</b>			
<b>RELIABILITY</b>			
<b>RESPONSIVENESS</b>			
<b>COMMUNICATION SKILLS</b>			
<b>QUALITY OF WORK</b>			
<b>ASSOCIATES</b>			
<b>GUT FEELING</b>			
<b>OVERALL ASSESSMENT</b>			

This project funded through a grant from the USDA Forest Service.

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