

# **Tips for Working with Microsoft® Access® Consultants**

**An OpenGate White Paper**

## Introduction

Microsoft Access provides tools to create custom desktop applications that are easy enough for non-programmers to use and create highly functional databases in a short amount of time. OpenGate Software's products augment and enhance Microsoft Access to make it even easier to create attractive databases in a short amount of time. But when you find your Access database needs to provide functionality more complex than what you can achieve by yourself, engaging a professional consultant is a natural path to choose.

This whitepaper provides hints and tips to help you successfully define your project and engage a professional consultant. What do we consider success? We consider it to be the following:

1. An end-product that provides the functionality you need.
2. A final cost for your solution that was understood and approved when you started the project. Any changes to the cost are brought to your attention in a timely fashion, and you understand the reasons for the increase or decrease in cost.

## Defining Your Project's Scope

The first step is to decide what your project's scope will be. The scope is often a brief, bulleted list of the highest level goals you wish to accomplish with your project, and your expectations. It is also advisable to note any major items you do not want to be considered "in-scope." This helps you, your consultant, and any of your team to understand what won't be included.

### Example Project Scope

1. Must have: A database that can support 5-10 users
2. Must have: The ability to create sales orders for products and services
3. Nice to have: The ability to send mass emails to customers
4. Must have: The ability to calculate total sales tax due to the government
5. Nice to have: Complete the project by January 20th
6. Not included: maintaining inventory

You should expect for your project scope to evolve over time, particularly before you get a quote from prospective consultants. Spend time visualizing what you want the end solution to do (and what it absolutely must do) for you to get a return on your

investment. If your application will be used by others in your organization, get their input early on.

In the example above, you will see that we've started thinking about relative priorities. It's very important to think hard about what is a "must have" versus "nice to have" element of scope. Prioritizing your scope will help you make tough decisions if your project timelines or budget are at risk.

### **Defining Your Requirements**

After you define your high-level scope, it's time to dig into the details. At this point you might ask, "I've defined my scope, won't my consultant figure out the details?" The answer is, to do so will result in a 90% chance your project will not succeed. Your scope definition is just the start, it lays the groundwork for your requirements. The requirements are where you fully define what you need your application to do for you.

So what is a requirement? It is generally a very short, specific phrase that describes something the software needs to do for you.

#### **Example Project Requirements**

- a. The ability to create sales orders for products and services
  - a) A user's name should automatically be added to each new order.
  - b) A new sales order should allow you to choose multiple products to include in the order.
    - Each item can be discounted individually
    - The user can specify item quantities and see a calculated total for that line item immediately
  - c) A user can choose to discount an entire order, which applies to all items in the order.
  - d) A user cannot delete a sales order once it has been created.
  - e) Sales orders have three possible status codes: New, Pending, Complete.
    - We should have the option to add new status codes without hiring a developer.
  - f) A user should be able to look up any email history related to an order (nice to have).
  
- b. The ability to send mass emails
  - a. ...

You'll notice that the top items (1) and (2) are really just repetitive from the example Project Scope in the previous section. That is because your requirements should be more detailed explanations of what your scope definition. And your requirements may have many levels. Using this format can help you, and your consultant, follow your

thought process from generic to specific. Moreover, it will be easier for you to confirm the end-product matches what you asked for. Imagine which is easier to compare to the application your consultant gives you, the example above, or:

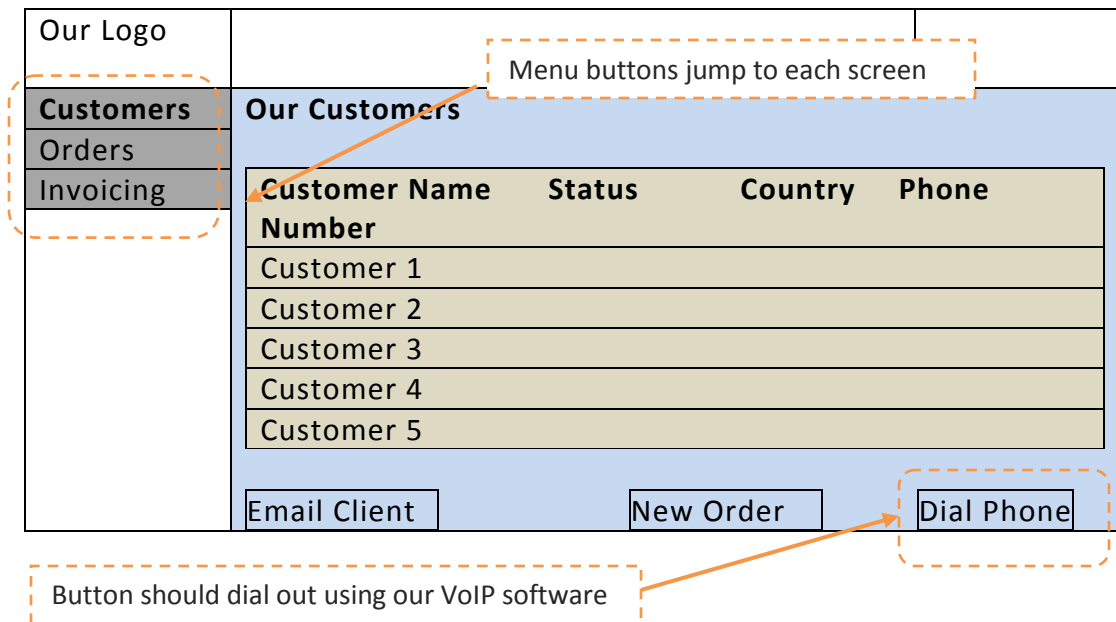
*The database should be able to take a sales order, calculate the sales tax, and keep the user's name with the order. They should be able to add several lines with different products, and change the status to "Complete" (there should be three status codes available....*

In the example above, you'll see that we have a requirement " We should have the option to add new status codes without hiring a developer." Requirements like this are important because they demonstrate foresight that, while you don't need it right now, you need your solution to have flexibility in a particular area. The benefit? You won't necessarily need to call your consultant when you add a fourth or fifth order status code.

You can also see in our example we have a "nice to have" note in (f). Instead of saying every requirement is "must have" or "nice to have," you can choose to just note the ones that are "nice-to-have." Similar to our discussion above about some scope items being "nice-to-have," deciding which requirements are not essential early on helps in the following ways:

- a. It tells your consultant where to focus. There is nothing more frustrating than previewing work you have paid for, only to find the majority of effort has been spent in an area that matters the least to your success.
- b. It will help you to decide which requirements to keep "in scope" as you evaluate your project budget. Particularly if a project is expected to cost more than you have budgeted, you can see whether dropping a few "nice-to-have" requirements will get you closer to your budget. A good consultant will provide a detailed quote and break out items you ask them to (such as "nice-to-haves").
- c. It will help you and your consultant discuss potential changes to an active more effectively. Imagine a scenario where you must have your project completed in 4 weeks. The consultant is 80% finished, but they will not be able to complete everything by the deadline. You may need to choose to receive the project late, or drop a few "nice-to-have" requirements.

Lastly, if you have a very particular look and feel you need for your project, you may wish to present some of your requirements in a visual form, called wireframes. A wireframe is simply a sketch of what you expect the user interface (screens) to look like, and notes about how you expect a user to interact with the application.



## Evaluating Consultants

Finding the right consultant for your project requires an investment of time and energy up front, but will pay off in the long term. We recommend you define a set of scoring criteria to decide which consultant will be the best to work with, and cost should only be one element.

Criteria	Why it is important
How well did they listen to you describe your project?	A consultant that is unable to listen to your needs may have difficulty delivering on your requirements.
Have they worked on similar projects?	While it is most important that they have a demonstrated skill with Microsoft Access, it always helps to know your project will not be a "proving ground" for your consultant to learn new techniques.
Will they provide references? What do the references say about their work?	A consultant that cannot provide references may not have much experience, or it may be a warning sign.
Are they willing to meet online to review requirements and prototypes (using GoToMeeting, WebEx, LotusLive, etc.)	Unless you insist on a consultant located in your city, it is not likely that you will be able to meet face-to-face to review your project's progress, or discuss post-delivery issues. Being able to meet online where you can share your desktop screens will improve collaboration and help minimize frustration.

Criteria	Why it is important
How many other projects are they working on at one time?	A consultant (or consulting firm) with too many projects can mean your project does not receive the priority that you may require. If the consultant has numerous simultaneous projects, make sure they can meet your timelines.
What sort of support will they provide after the project is complete?	It is important that your consultant commits to your project before, during, and after delivery. Make sure you understand and compare consultants' post-delivery support policies and costs.
How many years experience do they have with Microsoft Access and Visual Basic?	As with most other professions, a consultant with more years of experience is likely to bring more skill to the project. Consulting can be a difficult profession, so a consultant that has been in business for a long time is also an indirect sign they produce good work and have long-term relationships with clients.
How professional-looking is their proposal? Were they able to return a proposal in the time you needed?	While it shouldn't been the most important criteria, if your consultant's proposal lacks polish and detail, imagine what their service and work may be like once you have signed a contract with them.
Have they outlined their project process in detail?	You want to know before signing with the consultant that they have a mature, well defined project process from requirements discussion, estimate and schedule revisions, to prototyping and project reviews.

## What to Expect from a Consultant

Professional consultants should:

- Analyze your requirements and provide a detailed cost and schedule estimate.
- Raise questions about your requirements and confirm their design will meet your needs.
- Offer alternatives to your requirements that can achieve the same result with either greater efficiency, or a lower cost.
- Communicate with you via preferred means (phone, email) when possible.
- Provide consistent communication on project progress on a routine basis, or on request.
- Notify you immediately if the agreed upon schedule or budget is at risk, and provide a reasonable explanation and alternatives.
- Conduct "milestone" reviews with you to demonstrate their progress and ensure they are on track to deliver the end-product that meets your needs.

- Push back on scope changes and major requirement changes after a contract has been signed. A consultant needs to run a profitable business, and major omissions to your requirements are not likely to be absorbed by the consultant.
- Design a visually appealing interface that employs modern user interaction concepts. You should not have to settle for screens that look like they were designed in 1998.

## Conclusion

Contracting with a professional consultant to introduce advanced features into your database application is a necessity for many companies, whether it is due to a lack of time or experience. Much like engaging any other professional (realtor, painter, etc), make certain you evaluate multiple candidates according to the criteria that matter most to your projects' success. Expect the evaluation process to require time and energy to select the right candidate, and that your investment will yield better long-term results compared to selecting the first consultant you are able to locate. Once you've found the best consultant for your job, you have an opportunity to establish a lasting relationship that can lead to greater productivity and results in your company, and allow you to focus on your core duties instead of software development.

## About OpenGate Software

OpenGate Software offers world-class business applications and tools for Microsoft Access databases. Our experience ranges from creating mission critical public safety applications for 9-1-1 data processing, to popular Microsoft Access tools used by 1,000's of organizations worldwide. We build solutions easy enough for the average user to understand, and powerful enough to save experienced developers hours of custom work. OpenGate Software is a Microsoft partner.



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