

## Six Questions to Ask Before Hiring Your FileMaker Consultant



 **THE SUPPORT GROUP**

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## Introduction

You've made the decision to invest in FileMaker software. Maybe you need to add new features, improve an existing FileMaker system, or build a whole new FileMaker solution. If your organization lacks the time or expertise to do it in-house, you will likely hire a FileMaker consultant. And selecting the right FileMaker developer is crucial to saving you time and money.

This white paper highlights the most important attributes and qualifications of top-tier FileMaker consultants so that you can easily distinguish the quality performers and make a better-informed and more confident decision.

We've identified six specific questions you need to ask to gain valuable insight into a prospective FileMaker consultant's competency and business practices. The answers to these questions will give you the assurance that your developer has both the expertise and the experience to support your FileMaker needs — now and in the future.

### Question #1: Are You a FileMaker Certified Developer?

Choose a consultant who is a certified FileMaker developer. Not only does this ensure they have achieved FileMaker platform expertise, but it also demonstrates that they are focused on FileMaker-related work. If a consultant or developer is not certified, it calls into question their level of experience, ability and commitment to servicing FileMaker systems. But what is FileMaker Certification?

FileMaker maintains a formal certification program for developers and states that:

*FileMaker Certification is the official credential offered by Claris International Inc. Certification is your validation that you are hiring a company with an experienced FileMaker professional who has technical knowledge of the complete FileMaker product line and has passed the 'Developer Essentials for FileMaker' certification exam.*

With the release of FileMaker 7 in 2004, Claris International Inc. introduced their first formal certification program. An individual can become a FileMaker Certified Developer by demonstrating, via an intensive exam, that they have mastered some of the finer and more

complex aspects of the FileMaker platform, including and FileMaker Server. Specifically, the certification covers such skills as:

- Knowing the product technical specifications, capabilities and limitations
- Properly defining a database schema
- Understanding calculations
- Writing advanced scripts
- Securing FileMaker systems
- Applying FileMaker Server best practices
- Demonstrating full understanding of data integration and data movement
- Publishing FileMaker data on the web

After successfully completing the exam, individuals receive certification. Previously, certifications were tied to a specific version of the FileMaker program, but that is no longer the case.

Claris International Inc. takes an interactive approach to new feature releases within FileMaker, which is why certification is no longer version-specific. And as a result, they have extended the longevity of certification from one year to two years.

When an individual is a certified FileMaker developer, the certification also extends to the company. Both the individual and the company may then use this FileMaker Certified Developer logo on their business cards and marketing materials:



Choosing a developer with FileMaker Certification is a must. A consultant who is a FileMaker Certified Developer has demonstrated that they have a strong, in-depth working knowledge of the key components of and techniques for FileMaker development and support. It shows that the individual has met a high level of technical competence as established by Claris International Inc. Having the most up-to-date credentials shows that an individual is active and that they are expanding their FileMaker knowledge by staying current.

## Question #2: Are you a Claris Partner?

The Claris Partner program, formerly the FileMaker Business Alliance (FBA), is a support program managed by Claris International Inc., for the hundreds of companies who provide products, consulting and/or training to the FileMaker community.

But there's more to just being a Claris Partner. Claris International Inc. has designated a select group of their partners to be platinum-level members, which allows them "to receive priority access to sales staff, referrals for sales opportunities, as well as priority status in promotional materials."

Platinum membership is considered to be the who's who of the FileMaker consulting community. Roughly forty companies are designated as Claris Platinum Partners in the United States. Their membership is evident by the use of the following logo:



## Question #3: Are you a FileMaker Trainer?

Being a FileMaker Trainer is one more indication of a company's commitment to and focus on helping the FileMaker community. It also means that at least one individual at the company has received extensive training on the fifteen modules that comprise the FileMaker Training Series, providing the depth and breadth of FileMaker technical knowledge within that firm. According to Claris International Inc.:

*These trainers have extensive real-world experience and in-depth knowledge on the best practices in FileMaker solution development and are members of the Claris Partner program.*

*Courses are offered at trainer facilities and many FileMaker Trainers can provide customized training at your organization.*

As such, only FileMaker Trainers are permitted to use the official logo:



Consider the importance of training when choosing a FileMaker consultant. When someone on your staff is knowledgeable enough of the FileMaker platform to make simple changes like modifying a report, adding a field or changing a drop-down value list, you'll eliminate the need to have to call in a FileMaker consultant every time a change is required. And by choosing a trainer, who can offer formal introductory, intermediate and even advanced level FileMaker classes, you'll realize how accessible the FileMaker program is—even to those staff members who are not trained computer programmers.

#### **Question #4: Do you work independently, or do you employ other consultants?**

A major differentiator among FileMaker consultants is whether they work individually or as members of a larger firm, the pros and cons of which need to be weighed.

Working with an independent FileMaker developer is typically more cost-effective. Since they often work out of their homes with no employees, their overhead is minimal. This can (but does not always) translate to lower rates. Individual consultants may not always give you the attention you need if they are engaged full time in a large, long-term project or are otherwise unavailable. And should something go wrong — you find yourself dissatisfied with your developer's work; they are unresponsive; something is amiss with an invoice you received; or you are unhappy with any aspect of their performance —there is no recourse.

Going with a brick-and-mortar company, however, offers three advantages:

1. Other skilled FileMaker experts are on board to provide backup support.
2. A group of developers has more depth, experience and knowledge of the FileMaker platform.
3. Management is available to provide oversight and guidance to the developers, as well as a means of escalation if there is a problem.

A company with multiple FileMaker Certified Developers on staff will have broader availability and be more responsive, so work on your project will not grind to a halt and you can rely on immediate service when you need it. In addition, multiple developers and/or a project manager may be assigned, which will assure greater time and budget control as your project progresses.

And if your system touches on other technologies (e.g., web integration, connection to non-FileMaker systems) or makes use of FileMaker-specific plug-ins, there is a greater likelihood that someone on staff has experience with these. See question #6 for more details on FileMaker integration.

### **Question #5: Do you bill hourly or by the project?**

FileMaker service providers charge either an hourly rate or a fixed-project price. So which is better? For over thirty years, our customers have supported our hourly pricing model because they know they are getting what they pay for. They recognize that fixed pricing is rarely that — projects can and do go over budget, with the resulting costs exceeding the original fixed amount. To understand how hourly pricing is best suited to FileMaker development, one needs to take a step back and look at the methods used for software programming and how they apply to you.

The two common approaches to software development are waterfall and its extensions, such as the V-Model and Dual Vee Model and rapid application development (RAD), along with its offshoots, such as Rational Unified Process and Spiral Process.

In the early days, software was almost universally developed using the waterfall process and it is still used extensively today, typically in large IT organizations and often for large-scale projects. In these instances, a substantial amount of time (and cost) is invested upfront in the definition of the system, the result of which is an extensive, detailed and often voluminous functional specification document. Once approved, development begins and sometime later a finished product is delivered to the users. In this environment, a huge amount of work needs to be done upfront, the functional specification must be strictly adhered to and changes need to be prevented. A tightly defined and controlled process is typical for change orders, which are often—and purposely—difficult to implement.

But things often do change and there's an inherent inefficiency in spending huge amounts of time upfront to define a system that will likely not cover every single facet of the system's operation and incorporate each user's (and their manager's) needs. However, with a functional specification where every design decision has been made upfront and then approved and the entire form, function and operation of the system is known and must be adhered to by the developer, then a fixed-project price can work.

**Be aware of two important points when offered a fixed price:**

1. To reduce their risk and exposure, developers almost universally pad the number. You can be assured that whoever completes the price quote has studied the functional specification, taken the actual amount of time and cost estimated to build it and then tacked on more to give themselves some margin for error.
2. Once the price is agreed to, it's now in the developer's best interest to complete the job in as little time and with the minimum effort possible. This can lead to cutting corners and interpreting the specifications to suit their own best interests, not the client's.

As mentioned earlier, there's the issue of how fixed is "fixed?" Should disagreements or misunderstandings occur, the fixed cost is jeopardized. Understanding that the scope of the project has changed, the developer can, and in all likelihood will, ask for more money. This creates a conflict that puts the developer and business users at odds and only detracts from building the system. The business users who need to get this system built often find they have little choice but to pay for the overage.

The FileMaker platform, by contrast, is ideally suited for RAD, a software development method based on iterative and incremental development, where the system evolves through close collaboration between the developer and the business users. This means that the users are intimately involved in the design and review of the code in multiple iterations as it is developed.

RAD starts with a general set of objectives, needs and requirements. Parts of it are programmed and shown to the users who review it before more work is done. The project moves forward with everyone in agreement. Clearer understanding and refinement of the business requirements can be implemented as the development progresses in these iterations. More detailed design and functional decisions can be made during the development and changes can readily be made. The users see the application take shape and are often heavily involved in using and testing it as new components are added.

In this environment, paying for the development on an hourly basis as you see the work being done is the sensible choice. It allows for flexibility, freedom and speedy implementation of the users' choices. There's little in the way of cumbersome change-order procedures because there's no need for a formal, time-consuming revision and approval process for changes to a monolithic functional specification document.

**To ensure that the RAD process works for you, remember this:**

- A good FileMaker consultant will provide accurate estimates before the project starts and will supply detailed invoices during the project showing precisely what was done, by whom, when and the amount of time spent.

- As details and new requests emerge during iterative development, the consultant should be expected to assess each one to ensure they do not pose a risk to the project budget or timeline and will work with you to mitigate those risks if they do occur. This may mean trading lower priority items for higher ones to keep the project on track.

## **Question #6: What experience and expertise do you have integrating FileMaker applications with other applications?**

FileMaker applications can connect to and integrate with, a host of other technologies. You may have a stand-alone FileMaker application today, but where might it go tomorrow? And will the FileMaker consultant you select have the background and skills to take you there? Knowing more than just FileMaker allows your consultant to make recommendations that can dramatically increase the value of your FileMaker system.

FileMaker supports a host of technologies that allow for integration with other systems. This includes PHP, XML, XSLT, ODBC-JDBC and direct import and export of .csv, .tab, .dbf, .xls and .xlsx files. In addition, FileMaker applications can be extended with plug-ins that provide robust connections with QuickBooks®, iCal®, Microsoft® Outlook®, Entourage, SMS (texting) systems and external devices such as barcode and fingerprint readers. With more and more users demanding mobile solutions, FileMaker Go puts your database directly on your iPhone® and iPad® and via web integration, your FileMaker data is accessible from any mobile device or tablet with a web browser.

### **The following examples illustrate how the FileMaker platform integration features have extended its use:**

-  A small lab equipment reseller connected their FileMaker database to their website, allowing visitors to search for specific items in their inventory.
-  The performing arts school within a large university uses FileMaker applications to access student records in the campus-wide Oracle student database and augments it with information specific to them, such as talent groups, auditions and instruments.
-  A large national retailer integrated their FileMaker system with their corporate email system in order to send email notifications to key individuals whenever price changes are approved.
-  A Fortune 500 consumer packaged goods company uses FileMaker Go running on the iPad to track ideas that come out of their brainstorming sessions. Their FileMaker platform's direct support of PDFs provides essential documentation for their patent attorney.

A skilled developer will have experience not only with these technologies, but also with web development. More and more, FileMaker users want to make elements of their database available through their websites. To capitalize on this growing trend, the FileMaker platform offers FileMaker WebDirect and also supports Custom Web Publishing, which is more complex, but yields a more functional, highly interactive user experience. Integrating your FileMaker applications with your website via Custom Web Publishing generally requires that your consultant be familiar with PHP, the platform's language of choice for creating dynamic web pages.

## Free Consultation

If you need assistance with your FileMaker system, learn about our free consultation service at [www.supportgroup.com/services](http://www.supportgroup.com/services) or call us at 866-940-8400.

## FileMaker Mentoring

The Support Group's popular FileMaker mentoring service allows you to spend one-on-one time with an experienced, knowledgeable, FileMaker Certified Developer either side by side or remotely with our two-way web conferencing.

With one of The Support Group's experts guiding the way, you can:

- Improve your group's productivity
- Connect your database to the Web
- Tune up your FileMaker system for maximum performance
- Increase security
- Add new features, functions and reports
- Stay current by upgrading your FileMaker solution.

Learn more at <http://www.supportgroup.com/training/#mentoring>.

## About The Support Group

**The Support Group, Inc.** is a trusted leader in FileMaker Pro development, consulting, mentoring and training for both Windows and Macintosh systems and mobile devices such as iPhones and iPads. Headquartered in Boston, with offices in Los Angeles, the San Francisco Bay

Area and New York, The Support Group is staffed with a team of FileMaker Certified developers and is a Platinum-level FileMaker Business Alliance member.

We support clients large and small, in business, education and government throughout the U.S., including well-known brands such as Motorola, FileMaker, Inc., General Electric, Time, Inc., Harvard University, L.L. Bean, The Academy of Television Arts and Sciences and the Los Angeles Unified School District.

If you would like to customize or enhance your FileMaker application, [contact us](#) for a free initial consultation!

In addition to our FileMaker consulting services, we offer a number of hands-on FileMaker classes, from intro to advanced, at locations nationwide. [View](#) a complete class listing and schedule on our website.

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