

The Consulting Process

A “Bare Bones” Outline

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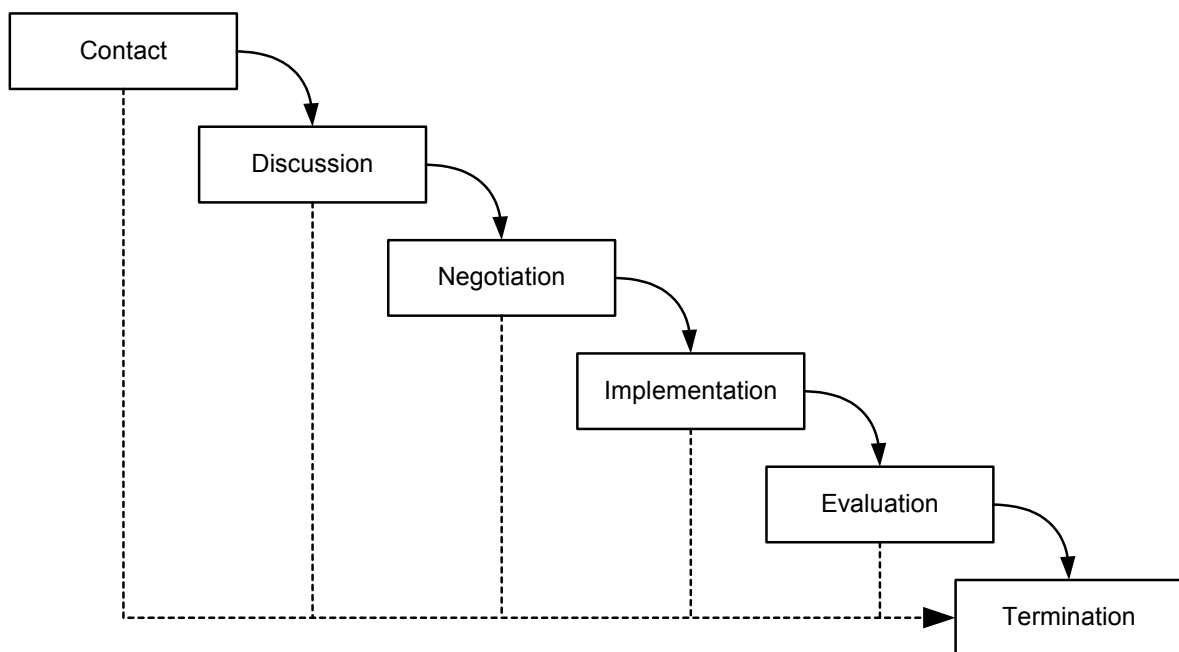


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The diagram below depicts the consulting process as I've experienced it. Its main stages are described in the paragraphs that follow.

The process typically begins with *Contact*. On occasion this has been at my initiative; usually it is at someone else's, most often a prospective client seeking help with a project or a consulting colleague looking for assistance with a current or upcoming engagement. *Contact* leads to *Discussion* or *Termination*.

Discussion focuses on identifying and clarifying the client's or colleague's needs, expectations and requirements, and the "fit" between those and my abilities and experience. *Discussion* might lead to *Negotiation* (implying a decision by the client that I could be helpful) or it could lead to *Termination*.



Negotiation, like any other stage, might end in *Termination* but, more often than not, results in an agreed upon Statement of Work and an agreed to price or billing arrangement.

Implementation comes next. It is marked by two basic phases: Initiation and Execution.

1. "Initiation" focuses on preparation and start-up. It entails activities such as establishing relationships, gathering information, honing the work plan that was devised during *Negotiation* and, possibly, engaging in further negotiations.
2. "Execution" focuses on doing what has been decided. It is action oriented and is concerned with getting the job done.

Implementation is followed by *Evaluation*. Here, client and consultant compare notes. Is the client satisfied? Were expectations met? Were adaptations to unforeseen circumstances

reasonable and appropriate? Are there new issues that have been surfaced and that need to be addressed? Are there any follow-on projects?

Contact, Discussion, Negotiation, Implementation and Evaluation, these are the active stages of the consulting process as I experience it. Any of them can lead to *Termination*.

The stages of the consulting engagement process are not as cleanly separated as the description and diagram above make them appear. There is a great deal of overlap and recycling, especially between *Discussion* and *Negotiation* and between *Implementation* and *Evaluation*. And, unforeseen circumstances encountered during *Implementation* can re-open *Negotiation*. The process, then, is iterative and cyclical, not linear.

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