


Contracting Phase of Consulting



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Topics

- Introduce yourself
- Understand problem
- Who is current client?
- Prepare for evaluations
- Learn client's organization
- Client ready? Proceed?
- Formalize agreement



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Goals of Contracting Phase


1. Establish successful relationship
2. Understand client's perceptions
3. Answer "Who is current client?"
4. Learn about client's organization
5. Answer "Client ready for project?"
6. Complete formal agreement

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 **Plan First Meeting With Client**

- Client issue RFP?
- Your goals for meeting
- Key stakeholders in meeting
- Time for meeting
- Cultural considerations
- Take notes
- Review beforehand



 **Introduce Yourself**


- Consultant's goals
- Consultant's assumptions
- Principles and ethics
- Expertise and resources




 **Introduce Yourself**


- Describe collaborative consulting
- Your boundaries
- Priority on learning
- Your fees?




 **Get Client's Perception of Problem**


- Understand, don't sell
- Use interpersonal skills
- Listen, don't solve
- Ask questions to understand




 **Get Client's Preferences**

- What's "success"?
- Preferred methods?
- Start and stop?
- Resources?
- Who will be involved?



 **Who is the Current Client?**

- Who makes decisions?
- Who, otherwise?
- Official contact?
- Who gets reports?
- Meet with whom, how often?



Pause for Reflection

Who should be in first meetings with your clients?

What do you want to emphasize about yourself in the meetings?


How emphasize that?



Learn More About Your Client


- Leadership style?
- How make decisions?
- Talkative or quiet?
- Written or verbal reports
- “Problems” or “opportunities”?







Learn More About Your Client


- Know change management?
- Strategies and structures vs. feelings and beliefs?
- Cultural needs?
- Anything else?




 **Prepare Client for Evaluations**


- Describe evaluation
- Benefits of evaluation
- Evaluation = learning!
- When done in project
- Be brief and practical
- Client's role



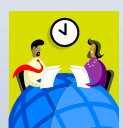
 **Is the Client Really Ready?**

- Funds for project?
- Potential obstacles?
- Upcoming major events?
- Open to perspectives?
- Their role in problem?



 **Is the Client Ready? (Cont.)**

- Use consultant before?
- People off limits?
- Others uncomfortable?
- Enough time and energy?
- (Warning signs?)





Do You Want to Do the Project?

- Match your capabilities?
- Client ready?
- Match your schedule?
- Match your nature?
- If not, tell client now.





Formal Agreements

- Always do
- Do proposal
- Open to discussion
- Client prefer agreement format



Pause for Reflection

What do you need from your clients to learn about them?

How do you decide if your client is really ready for change?



