The Consulting Process

A “Bare Bones” Outline

Fred Nickols

© Fred Nickols 2003
All rights reserved
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.

**Contact the Author**

Fred Nickols can be reached by e-mail at fred@nickols.us. Other articles of his can be found on his web site at: www.skullworks.com.