Assessment of Your Knowledge
of the Core Consulting Process

Description

The focus of CDI's virtual Series "Collaborative Consulting Training" is on the core knowledge and skills needed for any type of consultant to successfully consult in any type of project in any type of organization. Thus, the content of the courses, materials and discussions in this Series is core for technical, managerial and organizational consultants, whether they are internal or external.

There are many wide and diverse opinions about what the core content of the consulting process should be. For example, this assessment does not ask in-depth questions about certain specific methods of consulting, interpersonal skills in consulting, and ethical and legal risks in consulting. Also, it does not delve into various methods of facilitating large-scale, successful change in organizational systems. However, CDI offers virtual courses about each of these and many additional topics that the student can take to build on the core content in this Series.

This assessment covers many of the highlights of the content in this Series – enough to give you a useful impression of the breadth and depth of the Series, to help you decide whether the Series would be worth your time. So please take 5-10 minutes now to glance at the questions and come to a conclusion about whether to do the Series. If you have any questions, please email us at info@ConsultantsDevelopmentInstitute.org . Thank you!

Note: In your consulting, you might refer to different phases than those included in the following sections. However, the following phases are quite typical in a formal, systematic consulting process.

(You can enroll in this Series "Collaborative Consulting Training" from CDI's website: http://ConsultantsDevelopmentInstitute.org . See the link "Series and Certificates".)

Phase 1: Contracting Phase of Consulting

1. What are at least three of the goals of this phase?
2. Who should be in the first meeting with your potential client? What two organizational positions should be in the meeting, especially if the organization is somewhat small is size?
3. What are at least three of the five most important topics to discuss in your first meeting?
4. What if your client asks for a very short meeting with you – not enough time to cover the topics that you want to address? What is an effective way to address that?
5. What are some of the most useful materials that you could ask for, from your client to learn about their organization and its culture?
6. What are at least two of the primary goals that any professional consultant should have in any consulting project?
7. What are at least two of the primary working assumptions that any professional consultant should have in any consulting project?
8. What are some of the topics that you might mention to your client when talking about your overall principles and ethics in consulting?
9. What are some of the topics that you should mention when introducing yourself during the first meeting with your client? What topics should you avoid for now?

10. When introducing yourself, how much should you promote your services and yourself? How much should you talk about your fees?
11. What should you do if the client asks you now for the solution to solving their problem?
12. What are some key questions to help you and your client come to initial agreement on the scope of the client's problem?
13. What are at least two different definitions of what "success" might be in a project?
14. What is a "current client"? "Official client?" Why is it so important to know who they are and when?
15. What are at least two questions to consider when determining who fills those different client roles for now?
16. What are at least five key questions to pose to your client when learning more about them and their organization?
17. How do you define evaluation? How would you explain it to your client?
18. What are at least three benefits of evaluation? What is perhaps the biggest benefit?
19. What are at least five questions to ask to discern if your client is really ready for a project? How might it matter which questions are asked, if you are an internal or external consultant?
20. What are at least three questions to ask yourself to decide if you really want to do the project?

Phase 2: Discovery Phase of Consulting

1. What are at least three goals of this phase? What is the most important goal of this phase?
2. What is the role of a Project Team in a consulting project? Who should be on the Team? What tasks might the Team do during a consulting project?
3. What does the phrase "root cause" of a problem mean? What does "symptoms" mean? How is it that the client usually experiences primarily the symptoms of complex problems, rather than the root causes, at first?
4. What is the scientific approach to this phase? When is this approach best used for discovery?
5. What is the systems approach to doing discovery? What does the phrase "leverage point" mean? When is the systems approach best used?
6. What is the organic approach to doing discovery? What are the underlying belief systems of this approach? What is at least one advantage and disadvantage of this approach?
7. What is the silo approach to discovery? What might be one disadvantage of this approach?
8. What are at least three questions to begin focusing your discovery, that is, to begin targeting the root cause of the problem?
9. What is a performance model (or standard) and what is its role during discovery? What are some examples of performance standards or benchmarks? What is the difference between a performance standard and a data collection tool?
10. What is meant by the "business side" and the "people side" of organizations, and how do those sides play a role in discovery?
11. What are at least five tools to use to collect data during discovery and what is at least one advantage of using each tool?
12. What are at least four major considerations when deciding what types of tools to use to collect data during this phase?
13. What are at least three types of information that should be conveyed when announcing the discovery, or research effort, to members of your client's organization?

14. What are at least three groups of people to get data from, in your client's organization? In what order should you work with those groups?
15. Why is data collection one of the types of activities that should not be done collaboratively?
16. What are at least two different ways that you could organize the data from your research, so it is easier to analyze?
17. What approaches can you use to analyze the data, and in what order should you use those approaches?
18. What are at least three traits of the most useful types of recommendations to your client?
19. What are some of the limitations of using primarily brainstorming to generate recommendations?
20. What are some common mistakes that consultants make when feeding back the results of the discovery to their clients?

Phase 3: Action Planning Phase of Consulting
1. What is the overall goal of this phase?
2. What is the order in which the following activities should occur with the action plans: alignment, integration and reality check?
3. How would you decide whether to do a vision for change early in this phase or to do it later? What might happen if you do the vision at the wrong time?
4. What is a grand vision? A strategic vision? What is the benefit of knowing the difference between the two?
5. What is the most important criterion for good action plans? Why?
6. What are at least two additional criteria for good action plans?
7. What should be included in well-designed action plan(s) for each recommendation that was accepted from the previous phase?
8. Why is it important that the person, who is assigned to do an objective, is also the person who has strong input to assigning a deadline to that objective?
9. What are some of the benefits of combining the action plans into an overall change management plan? What else might be included in that plan?
10. A major benefit of action plans is that they help your client to "work smarter, rather than harder", when implementing the change management plan? What does that phrase mean?
11. Why should action plans be developed by a team? What are the major benefits of this?
12. Why don't the initial action plans have to be perfect?
13. When developing action plan(s) to implement a recommendation from the discovery phase, what are some of the questions to ask about the recommendation?
14. What are some of the questions to consider when integrating the various action plans?
15. What are some of the questions to consider when doing a reality check of the action plans?
16. What are some questions to ask your client and yourself to generate more learning for yourselves from this phase?
17. How do you know when action plans should be changed? How best to change them?

Phase 4: Implementation Phase of Consulting

1. What is the primary goal of this phase? What are at least two other goals of this phase?
2. What are at least three ways to ensure integration of the action plans throughout the client's organization?
3. What are at least three of the requirements that must be met in order to maintain motivation during change?
4. What are at least two of the requirements that must be met in order to maintain the focus during change?
5. What are at least two of the requirements that must be met in order to ensure ongoing strong political support during change?
6. What are at least two of the requirements that must be met in order to sustain momentum during change?
7. What are at least strategies that your client can do to sustain momentum during implementation?
8. Your client's resistance is more likely to occur during this phase than in any other. What is resistance? What are examples of it? How can you best manage it?
9. What does it mean to be authentic with your client in response to your client's resistance?
10. What is delegation and how does it differ from work directing? What are at least three steps and their order in the process of effective delegation?
11. How might the roles of the current client change during implementation, for example, what are some of the typical organizational roles that might be the current client during implementation?
12. Why can this phase be one of the most frustrating for the consultant during a consulting project? What are at least three strategies for the consultant to maintain professionalism during this frustration?
13. What are at least four different tools that could be used to track status of implementation?
14. What kinds of data might be collected to evaluate the quality of ongoing implementation?
15. How would you and your client conclude if any action plans need to be changed during implementation? How would you systematically change them?

Phase 5: Evaluation Phase of Consulting

1. What is the first goal of the evaluation phase?
2. What is evaluation? How would you define it to your clients?
3. During a project's final evaluation, why is it so important to assess how well the client has adopted necessary new systems and practices?
4. What if the results of the final evaluation indicate that success has not been achieved?
5. What are at least three barriers to evaluation and how might each be overcome?
6. What are at least three benefits of evaluation?
7. What are some benefits of doing the evaluation collaboratively with your client?
8. What is the most important result of doing an evaluation?
9. What are at least four of the key questions for any evaluation to always answer?
10. What key questions should always be included in an evaluation plan and in what order?
11. What are the possible different findings that could result from a final evaluation?

Phase 6: Termination Phase of Consulting

1. What are at least three of the goals of this phase?
2. What three main options that are typically available to the consultant and client, based on the results of the final evaluation?
3. What is "project creep"? How can it be avoided?
4. How might an unhealthy dependence show itself during this phase? How is that situation an unethical one?
5. What are at least three different reasons that a project might be terminated?
6. What are at least three topics that should be covered during the final meeting with the client?
7. What would you do if the client did not see a need for the final meeting?
8. What are at least three items that should be included in a final project report?
9. What is a healthy and ethical closure of a consulting project? What are at least two examples of a healthy and ethical closure?
10. If a healthy and ethical closure occurred, then why might it be a good idea for the consultant to be reluctant to meet further with the client about that project?