



*Consulting Skills &
Practica Success*

Dr. Robert K. Prescott, SPHR

*“The pure and simple truth is rarely
pure and never simple.”*

Oscar Wilde

Consulting Stages

- Initial Client Contact
- Project/Work Definition and Project Planning
- Data Gathering/Research and Analysis
- Developing Solutions/Recommendations
- Presenting Findings and Solutions/Recommendations to Client
- Implementation
- Review, Evaluation and Decision on Next Steps

Consulting Stages

- Initial Client Contact
- Project/Work Definition and Project Planning
- Data Gathering/Research and Analysis
- Developing Solutions/Recommendations
- Presenting Findings and Solutions/Recommendations to Client
- Implementation
- Review, Evaluation and Decision on Next Steps

Initial Client Contact

Step-by-Step

- Finding out why you are being brought in: what is the “main thing?”
- Focus on key components surrounding this
- Identify components separately, then run each deep
- When you feel you have enough...you have enough
- Ask “is there anything else I need to know”
- Set goals & objectives (desired outcomes)
- Decide go/no go?
- Discuss potential timeframes
- Set next meeting & action steps

Consulting Stages

- Initial Client Contact
- Project/Work Definition and Project Planning
- **Data Gathering/Research and Analysis**
- Developing Solutions/Recommendations
- Presenting Findings and Solutions/Recommendations to Client
- Implementation
- Review, Evaluation and Decision on Next Steps

Data Gathering/Research and Analysis Stage

Considerations:

- Scope of the Project
- Preferences of the Client
- Resources Available/Allotted (money, time, people)
- Your own Capability/Capacity to collect and analyze
- Information Sources (number of individuals, documents, etc.)
- Validity and Reliability necessary/expected

Data Gathering

Principles to Help the Process

- Know why you are collecting data
- Know what you are collecting
- Know how much data to collect
- Determine when & where to begin
- Avoid duplication
- Work together
- Use standard forms/procedures

Data Collection Approaches

- Document Review
- External Based Research
- Observation
- Interviews
- Focus Groups

Analyzing the Data/Research

- Identifying major themes, trends, issues, patterns
- Use of diagrams
- Funneling/sorting/sifting
- Manageable for you and the client
- Big picture then smaller snapshots
- Picking actionable areas

Descriptive Analysis

- Mean
- Median
- Mode
- Standard Deviation

Inferential Analysis

- Regression
- ANOVA
- Chi Square
- Multiple other choices

Presenting Data

- Presentation Dynamics
- Visual Graphs & Charts
- Essentials of Graphs & Charts
- “A Picture is Worth 1000 Words”

Consulting Stages

- Initial Client Contact
- Project/Work Definition and Project Planning
- Data Gathering/Research and Analysis
- **Developing Solutions/Recommendations**
- Presenting Findings and Solutions/Recommendations to Client
- Implementation
- Review, Evaluation and Decision on Next Steps

Planning A Framework for the Project/Work Definition and Project Planning Stage

Back in your project teams...

- Review project goals
- Analyze information that was exchanged (initial & any additional)
- Develop several recommendations - and assess
- Discuss proposed options for implementation
- Determine first steps & draft “contract” for discussion

Consulting Stages

- Initial Client Contact
- Project/Work Definition and Project Planning
- Data Gathering/Research and Analysis
- Developing Solutions/Recommendations
- Presenting Findings and Solutions/Recommendations to Client
- Implementation
- Review, Evaluation and Decision on Next Steps

Project/Work Definition and Project Planning *Meeting Components*

Presenting Your Project Plan

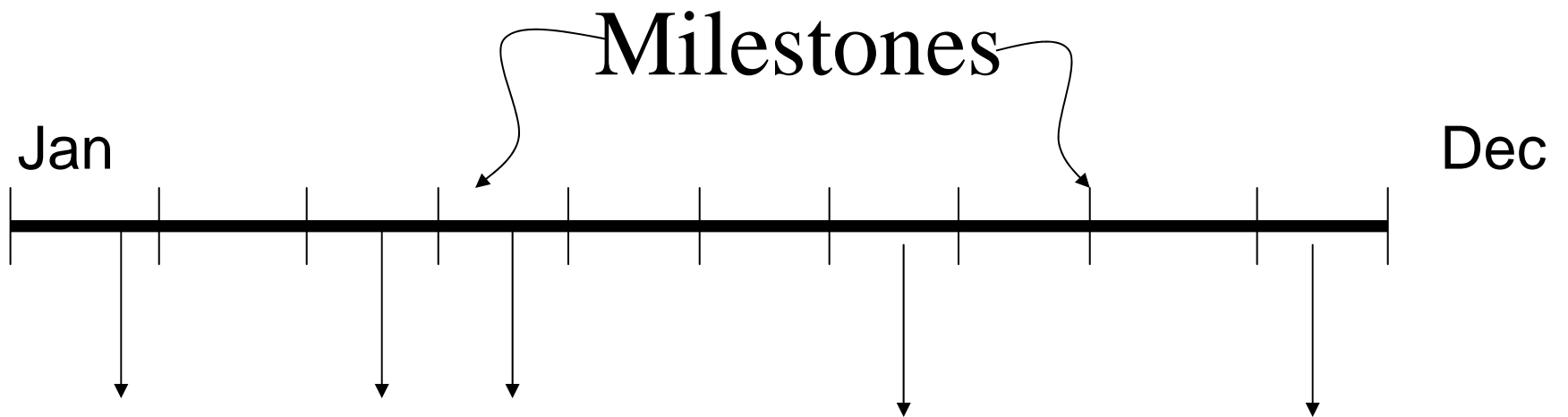
- Background of the Project
- Work Definition
- Goals of the Project
- Data Gathering Methods
- Recommendations for Moving Forward
- Tasks, Resources, Management &
Measures
- Project Plan Time Chart

Project Management

Key Elements

- Tasks
 - What do you have to do to reach your goal
- Resources
 - What -- people, things, money
- Management
 - Who will manage what?
- Measures
 - How to measure results

Project Management Timeline



Tasks

Resources

Management

Measures

The Meeting To Present Your Project/Work Definition and Project Plan

- Recap discussions to this point
- Restate the work definition
- Present project options
- Identify barriers, challenges
- Discuss how you will work together – who does what?
- Reach agreement
- Recap meeting and determine next steps

Consulting Stages

- Initial Client Contact
- Project/Work Definition and Project Planning
- Data Gathering/Research and Analysis
- Developing Solutions/Recommendations
- Presenting Findings and Solutions/Recommendations to Client
- **Implementation**
- Review, Evaluation and Decision on Next Steps

Implementation Stage

- Taking action
- Communicating
- Continuous “discovery”
- Monitoring
- Project management dynamics

Consulting Stages

- Initial Client Contact
- Project/Work Definition and Project Planning
- Data Gathering/Research and Analysis
- Developing Solutions/Recommendations
- Presenting Findings and Solutions/Recommendations to Client
- Implementation
- Review, Evaluation and Decision on Next Steps

Review, Evaluation and Decision on Next Steps Stage

- At conclusion of project
 - What worked? What did not?
 - Were project goals achieved?
 - What might have been done differently?
 - Recommendations for future work.
- Formal evaluation report
- Formal presentation
- Decision on continuing, expanding, changing or ending work