



Consulting Skills Checklist

Do you know how to...

Working with clients

- consciously use influence skills
 - sell intangible ideas and benefits
 - ask questions that will get the information you want
 - build rapport with people
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Choosing the work you want

- know when you need to walk away from work
 - know when the client can't afford what they need
 - know when to/not to compromise your reputation for a deal
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Taking a brief

- prepare physically for the meeting
 - prepare mentally for the meeting
 - make friends with the client
 - find out what clients really want
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Contracting with the client

- talk about your fees
 - put together a proposal
 - create time lines and plans
 - set up performance indicators and milestones
 - make sure your solution fits with their vision and yours
 - report on progress
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Planning and managing work

- analyse client needs
 - plan activities, timetables and resources accurately
 - calculate return on investment
 - manage the project to meet your plan
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Analysing

- think critically about ideas, structures and systems
 - analyse data you or your colleagues collect
 - work out what the client really wants to know
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Working with other consultants

- work in a team
 - build a team
 - network across and outside your technical area
 - understand team member personality types
 - create strategic alliances
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Consulting Skills Checklist continued

Do you know how to...

- Presenting information**
- pass on information in an entertaining and exciting way
 - write proposals, tenders, reports, marketing communications
 - train others and make it stick
 - present findings - in writing or in person
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- Managing yourself**
- manage your stress
 - manage your time
 - overcome harmful patterns in how you work
 - know how to relax
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- Dealing with difficult jobs**
- overcome personal conflict between clients
 - rescue a brief that won't work
 - guide the client when they don't know what they want
 - negotiate when 2 clients disagree
 - tell the client the project is behind schedule
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- Dealing with difficult clients**
- tell the client they're wrong
 - establish a project "owner"
 - negotiate when the client doesn't like your ideas
 - identify when you're part of the problem
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- Breaking a contract**
- get paid when the client is folding
 - maintain business relations when the client personality sucks
 - back out when you just don't "get" the client
 - escape ambiguity when there is more than one culture or personality to deal with
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- Building business while on the job**
- manage clients to meet their/your deadline
 - make sure clients get what they paid for
 - get feedback on your performance
 - review what you've achieved and where you can do better
 - make sure clients pay you
 - get references
 - use clients to get more work
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