

## The Typical Consulting Engagement Sequence

Every business consultant should use the following steps when working with you, the business owner. If they don't use some fashion of this, seriously think about making modifications to your relationship with them. There are many more detailed steps to support the four listed below, but these four are the basis of all quality engagements.

- 1) They should meet with you, the small to medium business owner for preliminary discussion to review your business issues or project in its totality. If necessary follow on meetings are held to gain clarity of scope, purpose and expected outcomes.  
**(An Assessment Is Done)**
  
- 2) The data gathered in the meeting is analyzed by the consultant, with an eye towards your particular business (there are no typical businesses - every one is unique). They should review the many resources available to help you realize the desired outcome.  
**(The Data Is Analyzed)**
  
- 3) Specific recommendations – in the form of a written proposal – are made to you and the proposed solutions are prioritized.  
**(Recommendations Are Made And Prioritized)**
  
- 4) The agreed-upon recommendations are implemented, usually by the combined efforts of the consultant, any necessary experts **AND** you the business owner. *It is absolutely imperative that you the business owner participate, and be accountable for both the implementation and the sustaining of the changes.*  
**(Recommendations Are Implemented)**

This 4-step process is swift, sure, economical and hard hitting.

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