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## [The Consulting Process](#)

Generally, the SMR consulting process encompasses six stages:

### **Stage 1 – Clarifying Expectations of Work and the Working Relationship**

- **Discussion of specific problems and issues (provision of preliminary materials for consultant review).**
  - **What would success look like at the end of our work together?**
  - **What do you not want to have happen?**
  - **Who are the stakeholders who need to be involved?**
  - **Who needs to be involved in the development of a work plan?**
  - **Who is the final decision-maker for the client?**
  - **Who will be the primary contact with the consultant?**
  - **What is the timeframe for this work?**
  - **What is the big picture view of the organization and where it is going?**
  - **What challenges have you had in addressing these issues before?**
  - **What type of budget parameters are we working with?**
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- **What expectations do you have regarding the consultant's work or questions regarding methodology?**

## **Stage 2 - Work Agreements**

- Agree on work products, work activities, and work relationship
- Agree on timeframes
- Address issues of access to information and individuals
- Agree on issues of confidentiality/anonymity
- Clarification of roles: what will client do and what will consultant do
- Who and how will information be shared?
- Agree on fees and expenses
- Execute written agreement

## **Stage 3 - Data Gathering and Presentation**

- Gather and analyze data, examining all layers of the organization
- Verify presenting problems
- Present and discuss results of data gathering with stakeholders

## **Stage 4 - Decision Making**

- Review possible actions/choices with decision-maker
- Determine interventions

## **Stage 5 - Intervention**

- Implement agreed-upon activities to address problem or needs

## **Stage 6 - Evaluation**

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- Evaluate the consulting engagement and working relationship
  - Review effectiveness of interventions

If the client and SMR agree at any point that the initial problem was not accurately defined or the client wishes to increase the scope of work to include other considerations, the agreement would be revised accordingly.

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