



## Facilitating Effective Consultations

Prepare	<p><b><u>Before the consultation</u></b></p> <ul style="list-style-type: none"> <li>• Determine what you’d like to accomplish during the consultation.</li> <li>• Prepare a list of must-ask questions.</li> <li>• Prepare a packet of information that pertains to the topic of the consultation.</li> </ul>
Build Trust	<p><b><u>At the beginning of the consultation</u></b></p> <ul style="list-style-type: none"> <li>• Provide a comfortable meeting place.</li> <li>• Position yourself so you and client are equals (ie. if possible, don’t sit behind a desk or form an interrogation row of consultants).</li> <li>• Be authentic in your efforts to establish rapport and a relationship of trust.</li> </ul>
Listen & Problem Solve	<p><b><u>During the consultation</u></b></p> <ul style="list-style-type: none"> <li>• Listen more than you speak.</li> <li>• Take notes.</li> <li>• Identify key focus areas and/or strategies that will help the client.</li> <li>• Use language like, “Based on what you’ve said, it sounds to me like everyone in your group wants to work hard, but the group hasn’t come together yet as a team.” Allow the client to react to your suggestion. Notice what you’ve done in this statement; you: <ul style="list-style-type: none"> <li>○ Value and affirm what the client has shared.</li> <li>○ Value and affirm something about the individual or group before identifying a focus area.</li> <li>○ Demonstrate problem solving ability by suggesting possible key focus areas.</li> <li>○ Phrase the identification of a focus area or strategy in such a way that demonstrates your respect for the client and her ability to achieve her desired goal(s).</li> <li>○ Listen to determine if the client agrees or disagrees with your analysis.</li> </ul> </li> <li>• If the client disagrees with your suggestion, ask more questions. You can say something like, “Thank you for clarifying. Just so I can be sure I understand the bigger picture, would you mind talking some more about your staff meeting dynamics?”</li> </ul>
Facilitate Change	<p><b><u>At the end of the consultation</u></b></p> <ul style="list-style-type: none"> <li>• With the client, determine clear and attainable next steps.</li> <li>• With the client, determine how the client can gauge the impact of their actions.</li> <li>• Thank the client for the opportunity to visit.</li> </ul> <p><b><u>After the consultation</u></b></p> <ul style="list-style-type: none"> <li>• Send a note or email to the client thanking him for the opportunity to visit and welcoming the opportunity to meet again.</li> <li>• Jot down a few notes from your own perspective: What went well and what will you do differently in the future?</li> </ul>