## 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

### 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

### Taking a brief
- prepare physically for the meeting
- prepare mentally for the meeting
- make friends with the client
- find out what clients really want

### 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

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

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

### 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
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

Managing yourself
- manage your stress
- manage your time
- overcome harmful patterns in how you work
- know how to relax

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

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

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

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