



Tips for Discovery with a Consulting Client

Objectives: Build Rapport; Build Trust; Gather Info; Agree on A Solution; and Define Next Steps

Build Rapport

Exude confidence and positivity. Greet the client warmly and ask them how they are feeling today. They may be apprehensive so you must help them to relax and open up about their business challenge.

Build Trust

Introduce yourself and share your related experience and credentials. Clients choose consultants because consultants have fixed the problem before. The consultant's experience saves the client time and money associated with trial and error. Tell the client that you are excited to work with them, that you have reviewed the information they shared, and that you are confident that you can provide a solution.

Gather Info

Use probing questions to identify the business challenge, how the issue affects the business owner and what they've done to address it. Ask the client how they will feel once this addressed. Determine their time frame and budget to address the challenge. You have to find the solutions that work best for that client.

Agree on a Solution

Identify what part of the solution you can address based on the time and budget constraints of the project, your expertise and the client's prioritization of what needs to be addressed now. Set specific deliverables and manage the client's expectations. Help the client to see the value in the solution and agree to the direction. Answer their questions and work together to define the scope of work. Have the client agree and say, "Yes, this is the best solution."

Define Next Steps

Discuss next steps, the client's responsibilities, the communication schedule and the deliverables. Be as specific as possible so that the client knows what to expect. We do not want them to be disappointed with what you produce. Client satisfaction is key. End the meeting on a positive note reassuring the client that they made the right decision and that you are certain that you will be able to produce the agreed upon solution