

Consultation Preparation Worksheet

Organize the concern, evidence and decisions so your consultation stays focused and productive.

THE MAIN CONCERN

What is happening now?

When did it begin, and what have you tried?

THREE PRIORITIES

Priority 1

Priority 2

Priority 3

USEFUL INFORMATION

- ☐ Business Health Scan results
- ☐ Current goals and deadlines
- ☐ Relevant financial summaries
- ☐ Existing process, policy or project documents
- ☐ People responsible for the work
- ☐ Questions that require a decision

A SUCCESSFUL CONSULTATION

What would this meeting help you understand or decide?

Share only information relevant to the engagement. Clients may use the portal, email, text, mail or in-person delivery.