



## CHECKLIST

### Your first client meeting!

#### A) Do you understand or know your client's

- business?
- organizational-unit function or purpose?
- level of decision-making authority?

#### B) What might you expect or surmise about your client's

- expectations and experience in working with consultants?
- personal style?
- fears and concerns?

#### C) In your understanding, is the need or request

- clear and focused?
- common across the organization?
- related to an initiative that is under way?
- something you have the time and the knowledge base to address?
- better met by someone else?
- tied to business outcomes?
- a potential way to address a vexing problem?

#### D) Are you clear about

- your consulting charter and the parameters of your work?
- your personal goals?
- your consulting style and approach?
- the boundaries of your competence and knowledge base?
- other resources available to address the need?
- your response to resistance?
- your needs and expectations?