Consulting Success Formula

Master the Skills and Practices for Winning Proposals and Delighting Clients

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Student Course Book

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Introduction

All businesses have problems at one time or another. But it's not always easy to find solutions to these problems when you're working inside the organization.

That's where consultants come in with their unbiased, outside perspective and a fresh pair of eyes.

Consultants provide analysis and recommendations for clients using their expertise in relevant fields. They provide insight into the problems a company is facing and explore actionable solutions. Often, it's the consultant who goes on to implement the client's chosen solution.
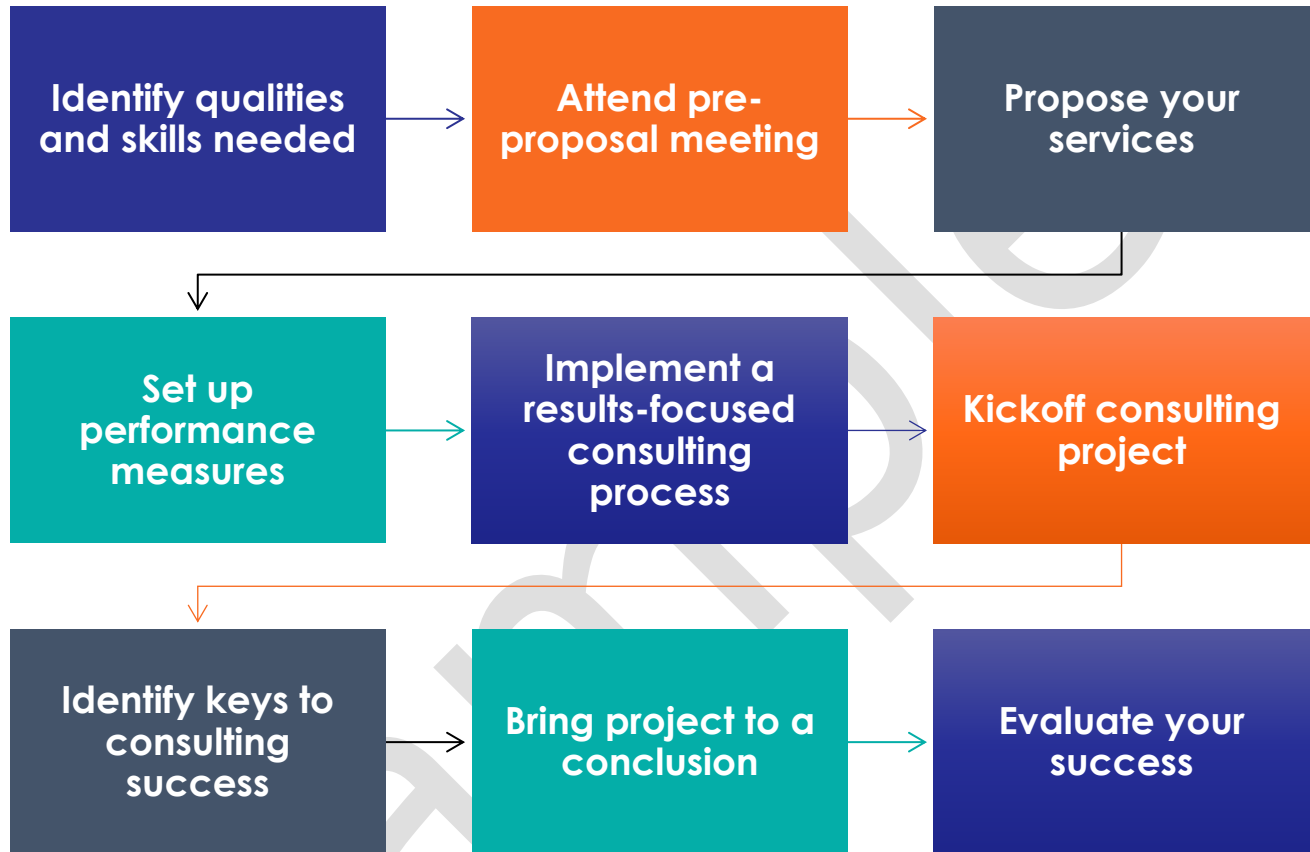
You'll find consultants in all areas of business helping solve a variety of business problems. Traditionally, these include areas such as business performance, IT, marketing, training, customer service, and innovation. These changes within companies can be both large and small. You'll also find consultants in niche areas like events organization or wedding planning. Anywhere there is a problem that needs solving, you'll find a consultant.

If you're interested in helping organizations operate more efficiently and more profitably, consulting could be a good fit for you.

However, you'll need much more than your own knowledge and expertise. To be a successful consultant, you must possess certain qualities, such as excellent interpersonal and analytical skills. This will help ensure a project is completed successfully.

This course will help you explore the type of consulting that fits you best. You'll find out how to improve your existing skillset and use those skills in a proven process that guides any consulting project to success. By the end of this course, you'll have learned how to apply the best practices and skills of high-performing consultants to provide maximum results for your clients.

Here is your roadmap through the course:

Identify qualities and skills needed	**Attend pre-proposal meeting**	**Propose your services**
Set up performance measures	**Implement a results-focused consulting process**	**Kickoff consulting project**
Identify keys to consulting success	**Bring project to a conclusion**	**Evaluate your success**

Your Course Outcomes:

By the time you complete this course, you'll be able to:

➢ Explore proven consulting models and decide which is the best fit for your skills and experience.

➢ Demonstrate the key qualities and skills of high-performing consultants so that you can provide measurable results to clients.

> ➤ Write and present a winning project proposal and leverage technology for a smooth-running project.

> ➤ Agree on the parameters for the project with your client and use proven practices to ensure results.

> ➤ Evaluate your project's success and draft your end-of-project report so that you can communicate your results to the client.

This course is broken down into 6 major modules and individual lessons to help you improve your consulting skills and learn more about the consulting process.

The modules follow a logical order, so while you can skip around if you want, it's best to work through them in order.

As you go through each module, use your Action Guide to help you complete the Action Steps. This will help you solidify what you have learned.

Action Steps:

Before we start the course, take a minute to think about what you want to get out of it.

In the Action Guide, write down three skills you expect to gain.

Now that you're clear about what you want this course to deliver, we can get started.

Module 1 - Which Type of Consultant Are You?

In this first module, you'll explore the purpose of consultancy in business. You'll also examine proven consulting models so you can judge which is the best fit for your skills and experience.

- ➤ **Lesson 1: Why Do Companies Hire Consultants?**

- ➤ **Lesson 2: The Top 2 Consulting Models**

Lesson 1: Why Do Companies Hire Consultants

The Difference Between Coaches and Consultants

Sometimes there is confusion between what a coach does and what a consultant does. Before we look closely into consulting as a business, let's clear up that confusion:

Coaches:
Facilitate and Enable

Consultants:
Recommend and Implement
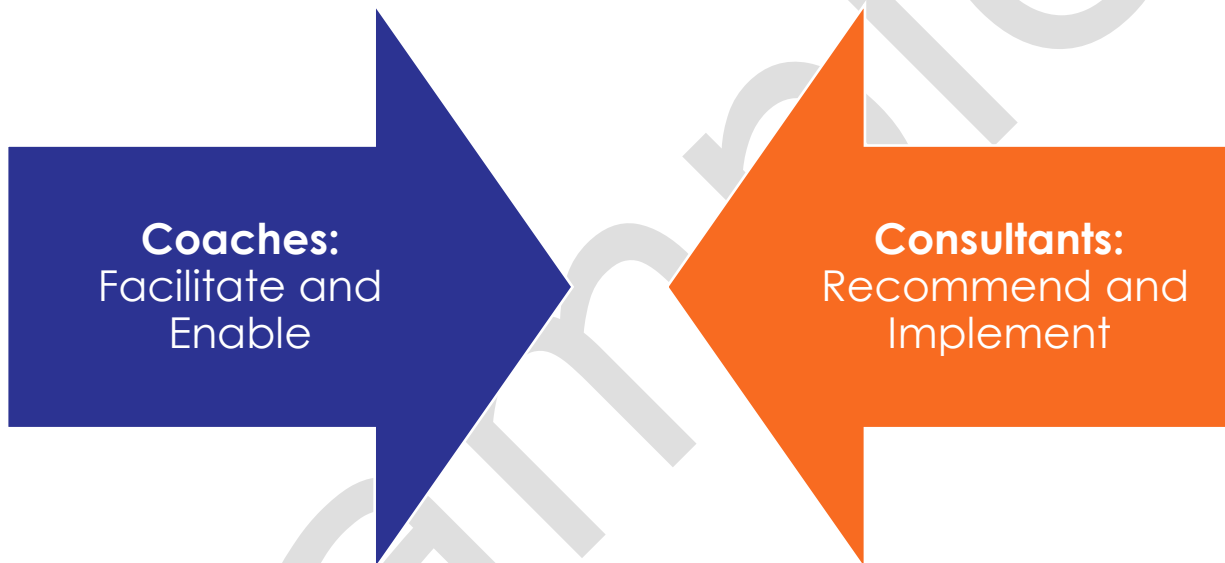
➢ **Coaches** are facilitators who help individuals and groups examine their issues, explore alternatives, and come up with the best solution for them to implement. The coach enables clients to make their own decisions and implement their own actions.

➢ **Consultants** are advisors who explore problems directly, gather and analyze relevant information, and recommend viable options based on their experience. The client decides which recommended option to go with, but then the consultant often implements the chosen solution. Consultants can work in all settings from individual clients to large corporations.

Some of the skills used, such as listening, are common to both roles with the end goal being to solve a problem. But the key differentiating factor is who does the work to bring about change.

Business leaders and executives may use coaches to guide and support them to achieve the results they want. But they'll use a consultant when their revenue is dropping, or they need to review their marketing strategy.

Reasons to Hire Consultants

Consultants provide expertise and suggest problem-solving tactics.

Consultants may specialize in various industries and areas, e.g., strategy, management, operations, human resources, finances, IT, sales, customer service, and marketing.

Some reasons people hire a consultant include:

A shift in the company's direction

Poor employee performance

Stagnant revenue or profitability

New initiatives to implement

Demand for improvement in an existing process

Need for a better data collection system

➤ A shift in the company's direction, such as a company that traditionally only operated in one geographic region expanding to a global market.

➤ Poor employee performance, such as a sales team not meeting targets.

➤ Stagnant revenue or profitability, such as an established retail store that is experiencing a steady decline in foot traffic and sales.

➤ New initiatives to implement, such as a company wanting to move into a new market niche where they've identified growth potential.

➤ Demand for improvement in an existing process, such as a manufacturing company that's receiving complaints from customers about lack of quality.

➤ Need for a better data collection system, such as with a small business where data is collected manually, and customer service records can become lost.

Advantages For Companies

When a business brings in a consultant, they get a fresh perspective on an internal issue. Sometimes it requires the objectivity of an outsider to see ways forward that aren't apparent to those inside the company. This can unlock innovative solutions.

In the short term, it's less expensive to hire a consultant than to hire full-time employees or redirect resources internally to resolve an issue that would impact other parts of the business.

Another plus is the consultant can focus on one job which has been agreed on at the start of the project. They aren't leaders who must continue managing while, at the same time, solving the identified problem.

Why Do Consultants Fail Sometimes?

It's not all good news for consultants. They've acquired a bad reputation in some sectors for draining revenue while not delivering the expected outcomes.

In most cases that reputation isn't justified, but it can be. There are a variety of reasons for this, such as:

ATTENTION:

This is only an excerpt from our full course **Consulting Success Formula.** The full, customizable course contains 5 major modules and Action Steps.

When you purchase a license for the course, you'll receive the editable files for the Course Book, Action Guide, graphics, social posts, and other resources.