BUSINESS CONSULTING / 01

DEFINE THE DECISION AND CURRENT STATE

Give each consultant the same bounded, non-sensitive business context and decision brief.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Business model / locations / team size / operating context at a high level

Decision, process or problem to address / current state in plain language

Why now / deadline / constraints / known dependencies

Current workflow and tools by category / non-sensitive baseline

Desired outcomes / questions to answer / what is outside scope

Decision owner / contributors / approvers / affected stakeholders

Preparation only. Not strategy, operations, forecasting, budgeting, valuation, accounting, tax, employment, cybersecurity, privacy, investment, lending, regulatory, or legal advice; no outcome is guaranteed.

BUSINESS CONSULTING / 02

MAP WORKSTREAMS AND INPUTS

Identify possible workstreams and information categories; the consultant proposes the method.

Discovery interviews / participants / scheduling and consent questions

Existing documents and data categories / owner / secure access questions

Current-state process map / baseline / assumptions and unknowns

Workshops, research or analysis / participants / decision points

Recommendations / prioritization / option and dependency format

Implementation, training, change support and knowledge-transfer needs

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BUSINESS CONSULTING / 03

DEFINE DELIVERABLES AND OWNERSHIP

Record the consultant's proposed phases, outputs, client responsibilities and handoff.

- [ ] The decision, process or problem is clearly bounded
- [ ] Current-state facts, assumptions and unknowns are separated
- [ ] Stakeholders, decision owner and approval path are named
- [ ] Credentials and sensitive records are excluded from this workbook
- [ ] Deliverables and review points are itemized
- [ ] Advice and implementation responsibilities are separated
- [ ] Dependencies, client inputs and change process are documented
- [ ] Acceptance, measurement, knowledge transfer and handoff are defined

Proposed phases / method / workshops / analyses / deliverables

Client inputs / access / stakeholder time / review and approval owners

Acceptance criteria / progress measures / changes / final handoff and support

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BUSINESS CONSULTING / 04

QUESTIONS FOR THE CONSULTANT

Use the same questions for each consultant and record assumptions, exclusions and ownership.

Framing: decision, baseline, assumptions and success criteria?

Discovery: interviews, documents, data categories and workshops?

Deliverables: sequence, format, review and approval owners?

Execution: advice versus implementation, training and change support?

Control: dependencies, changes, progress measures and open risks?

Handoff: final files, decision record, ownership and support?

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BUSINESS CONSULTING / 05

COMPARE WRITTEN CONSULTING SCOPES

Compare the same decision brief. A consulting label alone does not show method or deliverables.

Consultant A / Consultant B / proposal dates / same decision brief?

Discovery, inputs, assumptions and stakeholder work - A / B

Analyses, workshops, recommendations and deliverables - A / B

Implementation, acceptance, changes, handoff, support and terms - A / B

READY TO HEAR FROM PROS?

Optional next step: Create an account on PickYourPro.ai and start a business consulting request. Share the decision or process, non-sensitive current state, stakeholders, constraints, desired outcomes and timing so participating pros can compete with proposals. Keep credentials and private customer, employee, financial and security data out of the request.

One request. Every pro's best offer.

Start a request

Participation varies. A non-sensitive discovery and stakeholder-alignment conversation may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/business-consulting

U.S. Small Business Administration: Plan your business (official reference)

U.S. Small Business Administration: Manage your business (official reference)

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