

Assessments, a Consultants Critical Path

Assessments that evaluate or audit a client's needs is the critical path in the journey to earn a long-term client.

When asked by a prospective client what you offer as a consultant, it is common for professionals to present examples of their services, rather than first leading with the cornerstone of your services being the evaluation of needs and opportunities.

It is only after the client is confronted with their specific issues that the consultant earns the authority to introduce initiatives that can dramatically impact performance.

It has been my experience that large consulting firms view assessments of organizational needs as their primary product, while leaving the responsibility for implementing changes to leadership of the organization.



Smaller and independent consulting companies typically roll-up their sleeves and engage in implementing solutions, but in many cases without first assessing needs and earning the right to become a long-term strategic partner.

We need to deliver an assessment process that is packaged as a product, and although it might not be the ultimate revenue producing service you deliver, it will open many doors.

Here are the primary factors that should drive your assessments:

- Evaluate employee engagement
- Capture and summarize leadership and employee insights
- Track customer feedback and competitors
- Diagram workflows and expose bottlenecks
- Establish performance baselines

Small business owners are so focused on revenue, expenses, and daily operational routines, they do not always see the obvious. Nor can anyone close to them influence their mindset, because they cannot bring a comparative perspective, or feel comfortable challenging the status quo.

Herein lies the tipping-point for consultants. When a business owner acknowledges opportunities to improve performance, control, or work-life balance, it is the right time for a consultant to introduce initiatives or solutions that will deliver a significant ROI.