How to prepare for a meeting with a consultant – when you are not the boss.

Common outline of a consultation process:

- Leader or manager is made aware of a challenge in their group and chooses to engage with a consultant
- Consultant and leader or manager discuss and decide upon:
  - Overall goal
  - Process
  - Payment
  - Timeline
- Consultant visits with employees at multiple levels of the organizational structure surrounding the leader/manager
- Consultant provides themes collected to all individuals interviewed/questioned and possibly with additional members of the group
- Consultant works with the group and the leader (sometimes together as a group or individually) to support the changes suggested through the data gathering process

What questions can I ask to understand the contracting and the process?

- **Who is employing you? Who are you reporting to?**
  - This may provide insight into the intention of utilizing the consultant.
- **What will you do if the information you receive is negative regarding X person? Will the data/themes be shared with her/his supervisor? If not, what happens if nothing is done as a result of this process?**
  - It can feel frustrating to go through a process to raise challenging dynamics with the hopes that they will be addressed, only to see the process end without any follow up or resolution. If you want your question to be perceived with an intention of being helpful, you can add, “I’m asking because I am interested in supporting everyone through the change we may all need to make.”
- **What is your timeline?**
  - Knowing the timeline can help to alleviate anxiety. If meetings take place around a review or other important office functions, it could have an impact on how forthcoming people are. If you feel this is happening, you can share that with the consultant, with the intention that you want her/him to gather the most uninhibited information.
- **What will your process be for sharing the data you collect?**
  - It is important that anyone participating in giving data be part of receiving a report of some kind on what was received. If that isn’t part of the process, ask about the reasons why the consultant is choosing that process.
- **What is your position on the confidentiality or anonymity of the data you receive? How will you ensure that what I share with you won’t be attributable to me when you share the data?**
  - This is important to know so you can be thoughtful about what you are willing to share and what you aren’t. Be sure to know specifically how the consultant will address this. If you don’t feel her/his answer addresses your question, ask for a specific example of how s/he handled this with past clients.
How can I prepare what I want to say?

- Just like a job interview, go over your answers first.
- Write down what you feel the consultant should know on the left hand side of the page. On the right hand side of the page, prepare how you would feel comfortable framing or sharing that information. It is OK if the answer is, “I’m not comfortable sharing that.”

<table>
<thead>
<tr>
<th>What do I believe is important for Consultant to know?</th>
<th>How might I feel comfortable sharing this?</th>
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<td>Example: My boss is nasty and rude. And micromanages.</td>
<td>I believe my boss has a passion for ensuring excellence in the work we produce. There are times, usually when we are under the pressure of a big deadline, when s/he uses a raised voice and calls others names. I also notice in these times that my boss requires that s/he be part of every step of the process. This can be hard for me sometimes to get my work done in a timely manner. I want my boss to trust in my competence and show that by letting me complete the task as I usually do.</td>
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