



Carnegie Mellon University

Review initial meetings

Establishing a professional relationship

Examples of:

- Identifying common ground?
- Establishing shared understanding?

Models of Consulting

- What model of consulting:
 - Does your client seem to be working under?
 - Are you working under?
- Will taking a capacity building / process consulting approach be difficult?

Situation description

- Are you getting a broad understanding of your client and their organization?
 - Is there resistance / difficulty to getting any information?
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- Confidentiality agreements
 - Taboo information

Planning / meeting management

- How did the agenda go on your first site visit?
 - Who ran the meeting?
 - Was the meeting productive?
 - Was the time used fully?

Problem analysis

- What problems have you identified?
- How do those problems affect the mission?

Your community partner

- **Responsibility:** What is the client responsible for?
- **Authority:** Does the client have authority to drive the project and change management
- **Capabilities:** What capabilities does this client have to work effectively on the partnership?
 - For example in being engaged, taking initiative, organizational skills, technical skills.
- **Communications:** How effective is the client's communications

This week on site

- What are you going to do this week on site?