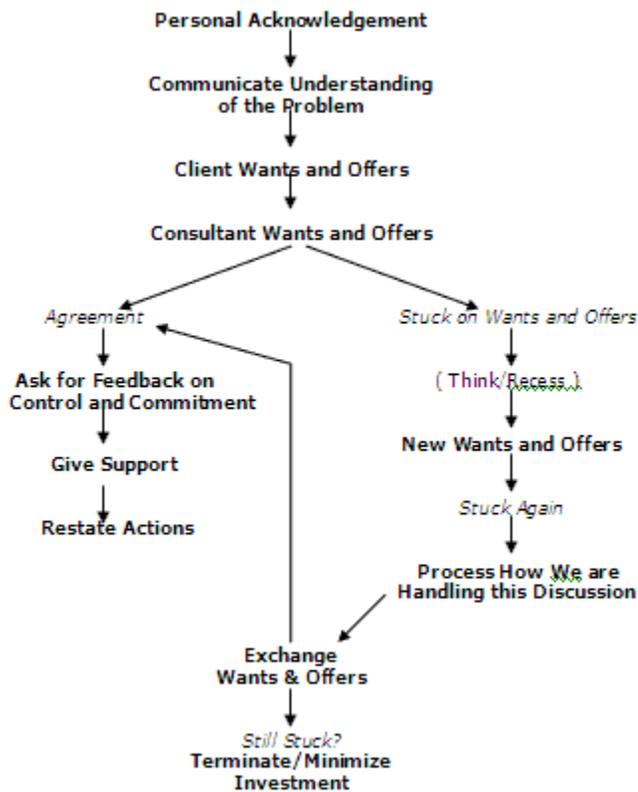


Internal or External Consultant Contracting

Ideas drawn from Peter Block's book "Flawless Consulting"

The Flow of the Contracting meeting:



For a related but different approach, see Michael Spayd's InfoQ Article: <http://www.infoq.com/articles/spayd-partnership-contract>

The Approach: Rationale

(Drawn from Chapter 5 of Peter Block's book "Flawless Consulting")

Personal Acknowledgement

It's a difficult thing for organizations to ask for help... So the first item is to do something that will help to increase the personal comfort level between consultant and client. Don't do this by discussing the weather! Make a personal statement about your feelings about being in this meeting with the client today. Examples:

"I was surprised that you were interested in what we are doing. I hope we can work something out."

"It looks like things are hectic for you. I hope this is a good time for us to get together."

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Communicate an Understanding of the Problem

- a. Acknowledge *unique aspects* of the situation, so they are sure you have been listening:
Clients are worried that they are unique and that there is no solution for their problem. It's expressed in roundabout ways. It's worth addressing early on, directly.
- b. *Restate*, in your own words, your perception of the problem. Again, you are letting them know you've been listening.
- c. *Reassure* them that there are solutions to their unique and complicated problem and that they can be helped

Client Wants and Offers

"So, what do you want from me?" (It must be asked directly, wait for an answer). This is the key qualifying question to determine whether and how you can succeed on this project.

"Do you have any specific ideas about how I should proceed?" (better to know up front)

"Are there any specific constraints on this work/engagement/project?" (It's vital that you find these up front)

Examples of constraints:

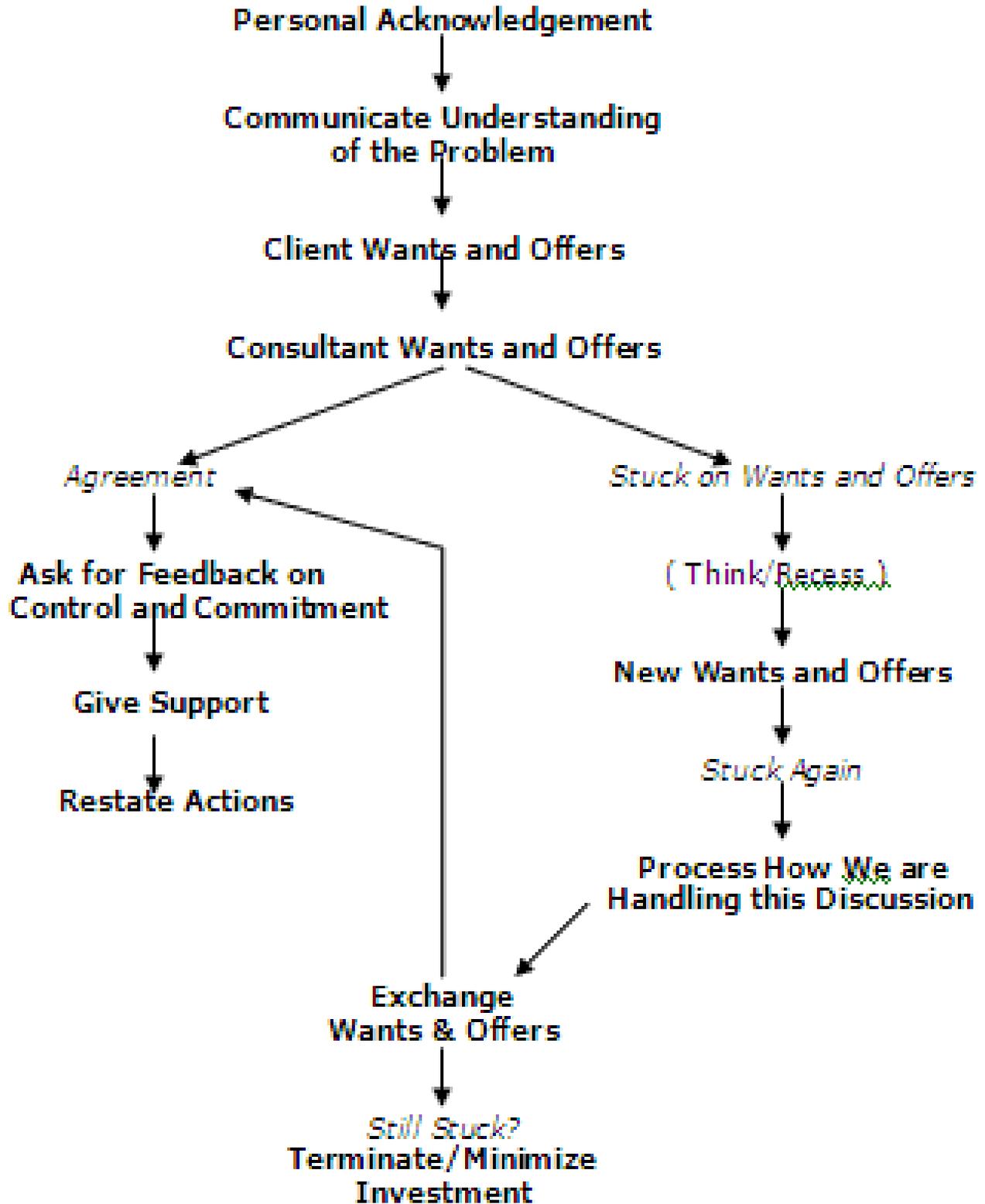
- You have 2 weeks to do 4 weeks work
- Budgetary considerations
- You shouldn't talk to any contractors
- Nobody knows the real reason for this study and you shouldn't tell them
- After this meeting, the client won't have any time to meet with you

Consultant Wants and Offers

Some "wants and offers" the Consultant might have are:

- Access to the project sponsor and other key managers associated with the project (sometimes this is something a lower manager is reluctant to grant to the Coach)
- A high level of commitment from the Product Owner
- Ability to assess the workability of the combination of the project, the Product Owner, the Team and the Apprentice. This includes the ability to decide on a course of action if one or more of this team are not suitable. In the extreme, this could include the Consultant deciding to withdraw from the project with the support of the Agile Champion.
- A clear up-front understanding about any significant compromises to Agile (eg, how the triple constraints will work, collocation, interference from outsiders, related groups not working in an Agile way, etc)
- The kind of Agile team space available
- Ability to give clear feedback about the Apprentice, Product Owner, the Team, and management
- Receiving clear feedback about his/her effectiveness
- Need for infrastructure support: phone, office, networking

The Flow of the Contracting meeting:



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Personal Acknowledgement

Communicate an Understanding of the Problem

Acknowledge *unique aspects* of the situation:

Restate your own perception of the problem:

Reassure them that they can be helped:

Client Wants and Offers

"So, what do you want from me?"

"Do you have any specific ideas about how I should proceed?"

"Are there any specific constraints on this work/engagement/project?"

Consultant Wants and Offers

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