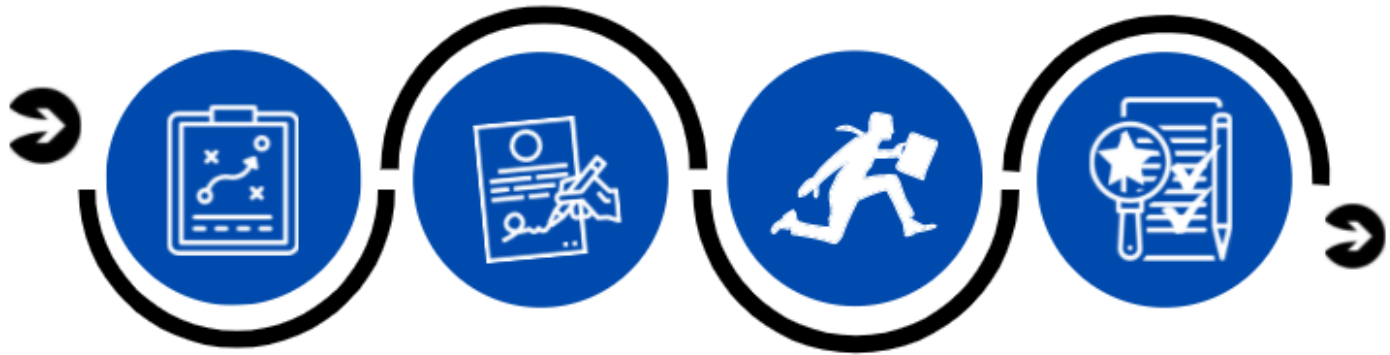


THE CLARITY PROTOCOL® - CONSULTING FRAMEWORK



1. **PREPARING:**

In this initial phase we are preparing ourselves – Consultant & Client - to work together: We review the **purpose, essential foundations, processes, and expectations** to be used to achieve a desired outcome. Quality work done here sets up the greatest success in all other phases.

*[To use an analogy: You can think of this as a Car Trip we intend to take together. We have brought up the idea, begun a general conversation, yet meet later to agree on the destination, action and resource details needed to have a successful trip. We both know - just like any good 'road trip' – preparation is **key** to successfully reaching the destination!]*

2. **DEFINING:**

During this phase of the Engagement, we engage in a **defined process** that creates a **detailed plan** outlining **deliverables** and **critical success factors**. We set the **Agreements** for working together.

[Furthering the Analogy...: We again discuss our vision & expectations for our destination; consider optional routes and which of those is best. We decide on a route, who will drive & when; which resources we will use & when; agree when to take 'pit stops'; watch for signs ensuring we are on track, or if needed, that indicate a 'detour' is desirable. And...Being conscientious fellow-travelers, we agree to having the most respectful experience possible.]

3. **MEASURING PROGRESS:**

In this phase we work the detailed plan: Guided by an agreed-upon **Scope & Timeline** we perform relevant **Action Steps**, participate in two-way **Accountability** Check-ins, and communicate & review **Progress-updates**.

[The Analogy here is: We begin 'the trip'; use and monitor the resources we packed for our trip; listen for any 'noises' we might be hearing with the 'vehicle'; refill the tank or load up on any items/resources we didn't previously pack; and...continue driving towards our destination. You can see that this Phase is where the 'rubber hits the road', as they say!]

4. **CONCLUSION:**

In this final phase of the Engagement, we **review Outcomes to-date** and Tools & Resources available for future Client action. We then define the Consultant/Client relationship for **moving forward**.

*[To conclude our Analogy: We will have arrived at that previously agreed destination? (Have we made it?!) Yes or No: We discuss the outcome of the efforts made to-date. Whether there's additional driving to do, or if this is where we part ways, engagement process has us discussing... "**Where to next?!"**]*

My DEFINITIONS of these terms (How I think of them as I work):

Consultant – An individual who utilizes training & experience to share information & wisdom.

Client – A person using services of a professional.

Purpose – The intention, objective, or reason something is done, created, or exists.

Essential – Necessary and important.

Foundations – Underlying principles; to include mental, physical, and emotional.

Processes – A series of interdependent actions taken to achieve an end.

Expectations – A belief about the future.

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Defined Process – A clearly articulated, engagement-specific series of steps to achieve an end.

Detailed Plan – A written series of steps, including timeline(s), objective(s), scope, activities, deliverables, and critical success factors.

Deliverables – Identified objectives that can be delivered.

Critical Success Factors – Specifics that must occur to achieve objectives & goals.

Agreements – A respectfully negotiated, honorably or legally binding plan – in advance - about actions or events.

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Scope – A defined range for observing, reviewing & examining; specific to the stated objective.

Timeline – Representation of actions, events or milestones illustrated linearly occurring over time.

Action Steps – An act of doing - typically to achieve an aim; a thing done.

Accountability – Taking ownership for being the primary cause of personal thoughts, words, feelings, and deeds (actions & in-actions) whether internally or externally (and, thus able to be blamed or credited for same).

Progress – Forward or onward movement toward a destination.

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Review – A process to look at something with the possibility or intention to institute change as necessary.

Outcomes To-date - The way a thing turns out (a consequence) on the date of review.

Moving Forward – Action (mental, physical, emotional) in the direction to make progress, toward a successful conclusion.