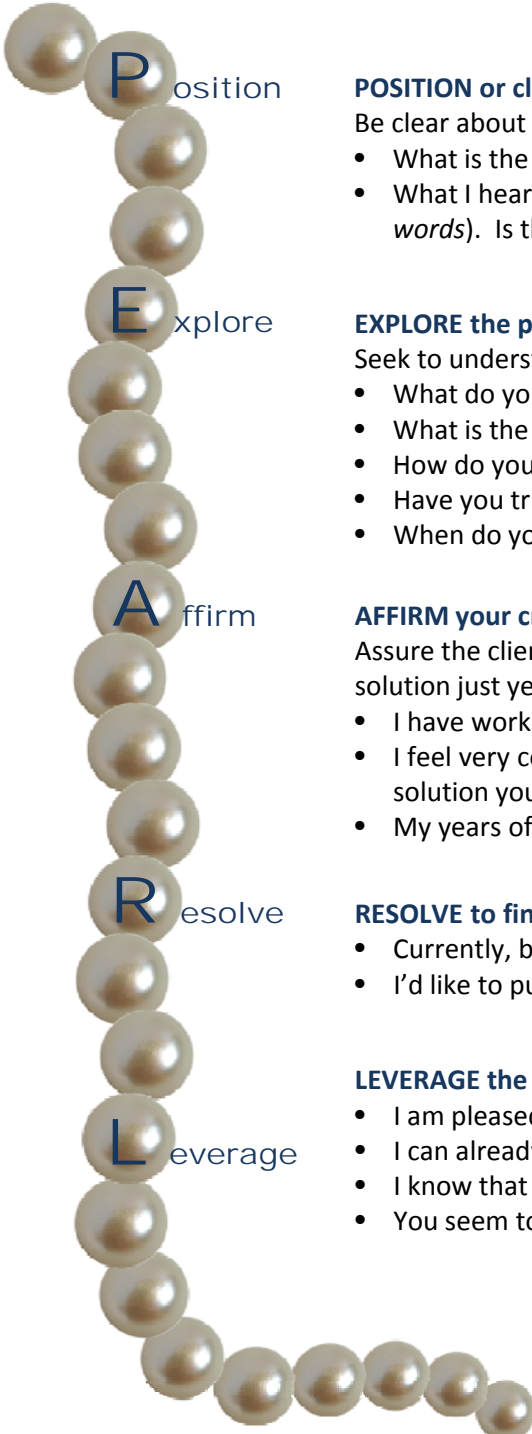




Initial Client-Consultant Meeting

Pearl Approach - A string of questions and statements to use when meeting with a client for the first time.



Position **POSITION or clarify the purpose of the engagement.**
Be clear about their challenge or problem by asking very pointed questions.

- What is the problem that you wish to fix?
- What I heard you say is that the problem is (*redefine the problem in your own words*). Is this correct?

Explore **EXPLORE the problem by asking probing questions.**
Seek to understand what they wish to see as outcomes.

- What do you see as possible if we accomplish this work?
- What is the criticality of this assignment?
- How do you know we have been successful?
- Have you tried to fix this problem or challenge before?
- When do you wish to see this completed?

Affirm **AFFIRM your credentials**
Assure the client that you are the right person. Remember you are not selling your solution just yet – but highlighting your credentials and experience.

- I have worked on similar projects. (*Give an example.*)
- I feel very confident that we can address/resolve or provide you with the solution you are looking for.
- My years of experience in this field include...

Resolve **RESOLVE to find a solution or process.**

- Currently, based on what you have shared with me, I can see several solutions.
- I'd like to put together a proposal for you that I believe will address your issues.

Leverage **LEVERAGE the relationship.**

- I am pleased that you have reached out to me to work with you.
- I can already see how passionate you are in making this 'project' successful.
- I know that I will enjoy working with someone like you.
- You seem to have a great team. It would be fun to work with them.

© 2012 by Angel Rampy. All rights reserved.