



Strategic Consulting Planning Questionnaire

We invite you to use this instrument to engage in a structured process of strategic exploration to reveal needs and objectives with regard to consulting projects you are contemplating. Your responses to these questions will help identify the elements of the project, the scope of the project, and the thought processes and decision-making that has informed the process to date. We will be happy to discuss the outcomes of this self-assessment with you. Please send your responses to Arden Treviño, director of NITLE Shared Practice, and she will schedule a conference call. Ms. Treviño can be reached at atrevino@nitle.org.

1. What do you expect to accomplish by engaging in this project?
2. How would you characterize the project you are contemplating? (Problem, issue, or opportunity?)
3. Are things OK now, but the project being contemplated would make things even better?
4. What is the scope of the project? For example, do you see this as a quick intervention or sustained project with many milestones?
5. Who has asserted the need for this project, or for this change?
 - External stakeholders such as trustees or alumni
 - Internal stakeholders such as faculty, staff, administration, or technologists
6. List the roles of all of the stakeholders that you have identified.
7. Are the stakeholders you have identified aware that they have been identified as such?
8. Did the need for the project suddenly arise or has it been planned for a while?
9. How long ago did the need for the project arise?
10. Where are you in the planning process?
11. Have you established project teams or review committees? If so, list the campus roles of the group members. (This will assist in understanding the planning that has gone into the project.)
12. Have you already worked with consultants in relation to this project?
13. What strategies have you identified and/or attempted in order to address the issue?
14. What obstacles have you identified?
15. What did you expect to accomplish in previous efforts to address the issue?
16. How did you decide what to try?
17. What were the results of your previous efforts? How did you measure success?
18. What considerations have been discussed to manage the change that will arise as a result of the implementation of the project?
19. How did you decide to reach out for external assistance at this time?
20. Did you establish criteria for selecting a consultant? For example, did you draft a Request for Proposals?
21. Have you been working with other colleges or consortial partners in planning for this project?