

# PRECONSULT GUIDE

CLIENT \_\_\_\_\_  
CONSULTANT \_\_\_\_\_ DATE \_\_\_\_\_

**Fuzzy Situation** Provide a high level description of the fuzzy situation. What's going on?



## DISCOVER EXPLORE THE OPPORTUNITY



**WIBGI... (Wouldn't It Be Great If...)** List challenges, opportunities, goals, wishes, dreams, desires, and other fuzzy situations that you might like to try and do something about. Explore preferred outcomes and ideal futures.

*What key challenges are you dealing with?*

*What could be improved? How would you benefit?*

*What are the recurring issues?*

*What opportunities are on your radar?*

*What is changing?*

*What would you do if you knew you could not fail?*

*What do you hope to accomplish?*

*What would you like to do differently?*

*If this problem were solved, what would you gain?*

*What do you want to achieve with this session?*

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**Clarify the opportunity.** Clarify a visionary goal that you would like to focus on. This should describe an ideal future that connects to the desired outcomes for the session.



## DESIGN GATHER RELEVANT INFORMATION



**P.L.A.Y.** List as many facts and insights that you know about the fuzzy situation. Consider people, processes, places, and products.

*What is a brief history of the situation?  
What is the present situation? What is the impact?*

*What are the key elements? Who are key people?  
What have you already thought of or tried? Results?*

### PEOPLE

People, groups, organizations, constituents

### LANDSCAPES

Environments, physical, social, political, digital

### ACTIVITIES

Processes, verbs, actions, interactions

### YIELDS

Objects, inputs, outputs, nouns, (in)tangibles



**P.L.A.Y. with purpose** Circle the most important or relevant facts & insights above.



## DEVELOP IDENTIFY THE KEY CHALLENGE



**HMW... (How Might We...)** Use facts and insights to create a list of challenges. As you identify a challenge, reframe it as a question, begin with “How might we...?”

*What is the essence of the challenge?  
What is this really about?*

*Why is this interesting or relevant?  
What's stopping us from doing this already?*

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# DEVELOP IDENTIFY THE KEY CHALLENGE



**Bricks and Towers** Create an assessment of the selected challenge by identifying the bricks (explore why aren't you...?) and the towers (explore why do you want to....?).

## Why do you want to [ ] ?

Would it help you to...

*What are the big picture goals for what you are building?*



*Start here with the original challenge statement*

**HMW... (How Might We...)**



## Why aren't you [ ] ?

Is it because you haven't...

*What are the smaller pieces that need to be achieved first?*



**Choose a focus.** Circle a key challenge above to further explore in the session.



# DELIVER PLAN THE SESSION

Write the key challenge statement that will be addressed in the session. Identify who should attend and what information is relevant.

## HMW... (How Might We...)

### PEOPLE

List participants who should attend the session

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### CONTENT

List information relevant/required for the session

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**AGENDA** Plan the activities and amount of time needed for each step. Clarify the outcomes for each activity.

activity						
timing						
outcome						

**NEXT STEPS** Identify what next steps need to be taken prior to the next meeting. Consider: information to collect and share, scheduling, invitations, pre work, location...

WHAT will be done	HOW will it get done	WHO will champion	WHEN will it be done