

# Building a Consultation Plan Worksheet



The **Building a Consultation Plan Worksheet** is a tool to help you plan out consultations at the front-end of your change initiative, setting the stage for an ongoing consultative and participatory approach to your change process.

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The key to successful change is sustained, visible and meaningful consultation and engagement. The goal is that you want employees and stakeholders to be *producers*, not just passive *consumers* of change.

To establish the change project’s credibility and legitimacy, it’s important to start as you mean to go on in focusing on consultation.

## Key Informants

Thinking about your change project, who are the key informants who should be consulted to provide input?

Consider two key objectives for the consultative process:

1. Gaining insights to help inform the change
2. Helping to contribute to internal alignment and engagement for the change

	DEPARTMENT/PROGRAM <i>What departments/programs of the organization should be consulted? Think about structure.</i>	INDIVIDUALS TO BE CONSULTED <i>Who are the right individuals to be consulted within those departments/programs?</i>	TYPE OF INPUT REQUESTED <i>What kind of input would be of most value from these key informants?</i>
INTERNAL	<i>E.g. IT Department</i>	<i>E.g. The Director</i>	<i>E.g. Background information on the last IT transformation to identify lessons learned/best practices</i>

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	PARTNERS/STAKEHOLDERS	INDIVIDUALS TO BE CONSULTED	TYPE OF INPUT REQUESTED
EXTERNAL			

## Consultation Methods:

Consider various forms of consultations:

- **Individual key informant interviews:** *This one-on-one approach is best suited for senior executives or functional experts. It allows for more in-depth input in a shorter period of time.*
- **Workshop consultation:** *Workshops are very helpful in creating shared meaning and exposing differences in interpretation or priority. You may wish to combine individual interviews with a workshop.*
- **Online/Email survey:** *In some cases, it's impractical to consult a broad group efficiently through interviews or workshops. Online/email surveys can complement your consultation design. They provide access to input from a large community quickly; however, that ease of access comes at the expense of depth of input and an experience of true consultation and exchange.*