

The Consultant's Memo

Write in the third person. Use your name, never "I."

CLIENT (YOUR NAME)

ENGAGEMENT DATE

NEXT ENGAGEMENT

REPORT BACK: WHAT DID THE OWNER DO SINCE LAST TIME?

THE BRIEF

Describe the business and situation the way you'd brief a new consultant.

WHAT DO THE NUMBERS SAY?

WHAT IS THE OWNER AVOIDING?

WHAT WOULD A NEW OWNER CHANGE FIRST?

WHAT IS THE OWNER TELLING THEMSELVES THAT ISN'T TRUE?

RECOMMENDATIONS · NO MORE THAN THREE

1

RECOMMEND

WHY

COST AND RISK

FIRST STEP

2

RECOMMEND

WHY

COST AND RISK

FIRST STEP

3

RECOMMEND

WHY

COST AND RISK

FIRST STEP

The Owner's Response

Switch roles. Answer every recommendation in the first person.

1

Recommendation 1

☐ Accept

☐ Change

☐ Reject

REASON

I WILL...

BY

IF-THEN PLAN: IF IT'S ____, THEN I ____.

TRIPWIRE: IF ____, BY ____, I RETHINK.

2

Recommendation 2

☐ Accept

☐ Change

☐ Reject

REASON

I WILL...

BY

IF-THEN PLAN: IF IT'S ____, THEN I ____.

TRIPWIRE: IF ____, BY ____, I RETHINK.

3

Recommendation 3

☐ Accept

☐ Change

☐ Reject

REASON

I WILL...

BY

IF-THEN PLAN: IF IT'S ____, THEN I ____.

TRIPWIRE: IF ____, BY ____, I RETHINK.

RULES OF THE ENGAGEMENT

- Every recommendation gets accept, change or reject, with a reason. Ignoring isn't an option.
- Every accepted or changed recommendation becomes "I will... by..." with an if-then plan.
- Next month starts with the report back. Unfinished commitments get a new date or an honest reject.