

Appendix G:

Sample Questions from an External Evaluator

The following are sample questions by category that can be used to discover the client's expectations, desired outcomes and budget. Use your judgement as to which questions you use, based on the type of client and the type of contract. A general rule of thumb is to use at least 3 – 6 questions per category.

QUALIFYING (size, relevant to your expertise, timing):

1. Why do you think we might be a good match?
2. Is there a budget allocated for this project?
3. How important is this need (on a scale of 1 to 10)?
4. What is your timing to accomplish this?
5. How soon are you willing to begin?
6. Have you made a commitment to proceed, or are you still analyzing?
7. What are your key decision criteria in choosing a resource?
8. Have you tried this before (will this be a continuing endeavor)?

BUYER (writes the check):

11. Whose budget will support this initiative?
12. Who can immediately approve this project?
13. To whom will people look for support, approval, and credibility?
14. Who controls the resources required to make this happen?
15. Who has initiated this request?
16. Who will claim responsibility for the results?
17. Who will be seen as the main sponsor and/or champion?
18. Do you have to seek anyone else's approval?
19. Who will accept or reject proposals?

QUESTIONS (responding to buyer's objections, if any):

20. Why do you feel that way? (Get at the true cause.)
21. If we resolve this, can we then proceed? (Is this the sole objection?)
22. But isn't that exactly why you need me? (The reversal approach.)
23. What would satisfy you? (Make the buyer answer the objection.)
24. What can we do to overcome that? (Demonstrate joint accountability.)
25. Is this unique? (Is there a precedent for overcoming it?)
26. What's the consequence? (Is it really serious or merely an annoyance?)
27. Isn't that low-probability? (Worry about likelihoods, not remote possibilities.)
28. Why does it matter in light of the results? (The return on investment is the point.)

ESTABLISHING OBJECTIVES

29. What is the ideal outcome you'd like to experience?
30. What results are you trying to accomplish?
31. What better product/service/customer condition are you seeking?
32. How would the operation be different as a result of this work?
33. How would image/reputation/credibility be improved?
34. What harm (e.g., stress, dysfunction, turf wars, etc.) would be alleviated?
35. How would your value proposition be improved?

ESTABLISHING METRICS

36. How will you know we've accomplished your intent?
37. How, specifically, will the operation be different when we're done?
38. How will you measure this?
39. What indicators will you use to assess our progress?
40. Who or what will report on our results (against the objectives)?
41. Do you already have measures in place you intent to apply?
42. What is the rate of return (on sales, investment, etc.) that you seek?
43. How will we know the public, employees, and/or customers perceive the change?
44. Each time we talk, what standard will tell us we're progressing?

ASSESSING VALUE

45. What will these results mean for your organization?
46. How would you assess the actual return (return on investment, return on assets, return on sales, return on equity)?
47. What would be the extent of the improvement (or correction)?
48. How will these results impact the bottom line?
49. What is the intangible impact (e.g., on reputation, safety, comfort, etc.)?
50. How would you, personally, be better off or better supported?
51. What is the scope of the impact (on customers, employees, vendors)?
52. How important is this compared to your overall responsibilities?
53. What if this fails?

DETERMINING THE BUDGET RANGE

54. Have you arrived at a budget or investment range for this project?
55. So we don't waste time, are there parameters to remain within?
56. Have you done this before, and at what investment level?
57. How much are you prepared to invest to gain these dramatic results?
58. For a dramatic return, will you consider a larger investment?
59. Let's be frank: what are you willing to spend?

PREVENTING UNFORESEEN OBSTACLES

60. Is there anything we haven't discussed that could get in the way?
61. In the past, what has occurred to derail potential projects like this?
62. What haven't I asked you that I should have about the environment?
63. Are you surprised by anything I've said or that we've agreed upon?
64. What, if anything, do you additionally need to hear from me?
65. Is anything likely to change in the organization in the near future?
66. Are you awaiting the results of any other initiatives or decisions?
67. If I get this proposal to you tomorrow, how soon will you decide?

INCREASING THE SIZE OF THE SALE

68. Would you be amenable to my providing a variety of options?
69. Is this the only place (division, department, geography) applicable?
70. Would it be wise to extend this through implementation and oversight?
71. Should we plan to also coach key individuals essential to the project?
72. Would you benefit from benchmarking against other firms?
73. Would you also like an idea of what a retainer might look like?
74. Are there others in your position with like needs I should see?
75. Do your team members possess the skills to support you appropriately?
76. Should we run focus groups/other sampling to test employee reactions?
77. Would you like me to test customer response at various stages?

GOING FOR THE CLOSE

78. If the proposal reflects our last discussion, how soon can we begin?
79. Is it better to start immediately, or wait for the first of the month?
80. Is there anything at all preventing our working together at this point?
81. How rapidly are you prepared to begin once you see the proposal?
82. If you get the proposal tomorrow, can I call Friday morning at 10 for approval?
83. While I'm here, should I begin some of the preliminary work today?
84. Would you like to shake hands and get started, proposal to follow?
85. Do you prefer to issue a corporate check or to wire the funds electronically?
86. May I allocate two days early next week to start my interviews?
87. Can we proceed?