Category

Consulting

End-to-End Consulting Engagement (From Pitch to Delivery)

A practitioner's playbook for running a consulting engagement from the first client conversation to final delivery and handoff.

- Practitioner
- Intermediate

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- 7 minute(s)

Overview

A five-phase spine for running consulting engagements end to end — pitch, contract, mobilize, deliver, and close — with the templates and governance rhythm to keep scope, margin, and the client relationship intact.

How do you price a fixed-scope engagement versus time-and-materials?

Fixed-scope works when the problem is well-diagnosed and the deliverables are clear — price it to the value of the outcome, with a floor based on effort. Time-and-materials is the honest choice when the scope is still genuinely uncertain; just be explicit with the client about why, so it doesn't read as hedging.

What goes in a Statement of Work that most consultants forget?

A named change-control clause. Without one written into the SOW itself, there's no shared mechanism to price and approve scope changes — so they get absorbed silently instead, which is exactly how margin disappears over the course of an engagement.

How do you handle scope creep without damaging the client relationship?

Log every request against the SOW's change-control clause and bring it back to the client as a priced option, not a confrontation. Clients rarely object to paying for more work — they object to being surprised by it after the fact.

What's the right cadence for steering committee updates?

Weekly, held without exception — even in a week with "nothing new" to report. An as-needed cadence reliably becomes never, and the first real update the client gets ends up being the final readout, which is far too late to manage a surprise.

How soon after close should you ask for a referral or case study?

Within a week of the final readout. The outcome, the client's enthusiasm, and their willingness to be quoted are all highest right after a successful close and fade quickly once attention moves to the next priority.

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