

Consulting Service Delivery Workflow Process Outline

1. Initial Contact & Inquiry

1. Receive client inquiry
2. Schedule introductory call or meeting
3. Understand client needs and objectives

2. Proposal & Agreement

1. Assess scope and requirements
2. Develop & submit proposal
3. Review proposal with client
4. Negotiate terms and make revisions if needed
5. Sign agreement/contract

3. Onboarding & Preparation

1. Kick-off meeting with stakeholders
2. Gather relevant client information
3. Define project plan and timeline
4. Assign project team and roles

4. Delivery & Execution

1. Conduct research and analysis
2. Develop recommendations and solutions
3. Engage in regular progress meetings/updates
4. Deliver interim/milestone reports
5. Implement agreed-upon deliverables

5. Review & Feedback

1. Present final deliverables to client
2. Collect feedback and address concerns
3. Make adjustments if required

6. Project Closure

1. Confirm project completion with client
2. Document outcomes and lessons learned
3. Support handover or transition if needed
4. Send final invoice

7. Follow-Up

1. Check in with client post-delivery
2. Offer ongoing support or additional services
3. Request testimonials or referrals

