

# Key Questions in Defining the Client's Strategic Needs

*The following questions should be answered (as appropriate) either through client interviews or published sources:*

## **Financial**

- What are the client's sources of revenue or funding?
- What is the client's current financial situation?
- What is the financial outlook for the client's market sector? (growing, stable, declining?)
- What major expenditures is the client anticipating? How do these affect the consulting budget?
- How do consulting expenditures compare with what was anticipated or budgeted? Are there significant budget overruns or unplanned expenditures?
- How does the client reduce expenditures when necessary?
- What is the client's consulting spending? Is it increasing, decreasing, holding steady?
- Does the client face any notable financial risks or liabilities?

## **Political and Competitive**

- Is the client an industry or market sector leader? Average? Below average?
- Are there political or competitive issues that have particular impact on the client? (new products, mergers or acquisitions, competitive threats, political changes, labor concerns, etc.)
- What trade associations does the client belong to? How active are they in these groups?
- What professional publications does the client read?

## **Regulatory**

- What is the client's posture toward regulatory compliance? (beyond compliance, average, minimal?)
- Does the client or market sector face any significant regulatory enforcement actions?
- Are there upcoming regulatory developments that will significantly impact the client?

## **Organizational**

- Are there any internal political or management mandates that drive consulting priorities?
- How is the client contact and his/her agency or department evaluated? What defines success?
- Are there special operational issues that significantly impact the client?

## **Public Relations**

- Does the client have significant public relations concerns?
- What is the client's relationship with the community in which it operates?
- How much do they engage the community in project-related decision making?

## **Project-Specific**

- Which of the above strategic issues are most driving the need for the project?
- At what level in the client's organization was the need for this project determined?
- What are the goals or metrics for a successful project relative to meeting these strategic needs?