

## OUR CONSULTING PROCESS

### PHASE I

1. Preliminary information gathering with the client contact person/chief officer.
2. Presentation and approval of proposal: Goals; Agenda; Process; Date, time & location of off-site meeting; Fees.
3. One-on-one interviews with all physicians (approx. one hour per).
  - Meet each other prior to the off-site.
  - Explain and distribute questionnaires. Responses will be reviewed and summarized prior to the off-site.
  - Address initial physician questions and concerns.
  - Conduct Versatility Profiling.
4. Review interview comments and questionnaire results, and prepare for off-site meeting.

### PHASE II

1. Brief client contact person/chief officer
2. Conduct off-site meeting:
  - Identify Expectations, Issues, Goals
  - Review data from interviews and questionnaires, in general terms.
  - Prioritize Issues and Goals
  - Work on Issues and Goals, using business principles of group process.
  - Review Versatility Profiling
  - Develop an Action Plan
  - Identify next steps.
  - Evaluate the day.
3. Outline and schedule Phase III activities.

### PHASE III

1. This phase includes implementation and follow-up to facilitate and monitor progress of activities identified in the Action Plan. It can take various forms, but typically would include a series of regular on-going meetings and retreats, sub-group and one-on-one activity, strategic planning, and progress reviews.