

# assessment phase vs consulting phase

A simple, side-by-side look at how each phase supports your organization.

Assessment Phase	Consulting Phase
<b>Purpose:</b> Understand what’s happening today.	<b>Purpose:</b> Improve how things work going forward.
A structured <b>diagnostic</b> that reviews systems, workflows, and team capacity.	A project tailored to your goals, focused on <b>implementing</b> improvements.
<b>Scope is fixed</b> — a defined set of deliverables for a set price.	<b>Scope is customized</b> — built from the assessment findings.
<b>Identifies</b> what’s working, what’s not, and why.	<b>Addresses</b> the gaps and opportunities identified in the assessment.
Includes systems review, workflow <b>mapping</b> , staff conversations, and goals clarification.	Includes workflow <b>redesign</b> , systems cleanup, SOP development, training, and implementation.
<b>Produces:</b> A clear Assessment Summary with recommended priorities.	<b>Produces:</b> Tangible improvements: updated workflows, documentation, systems, and staff capacity.
Helps determine the right level of support and investment.	Executes the work needed to create clarity, consistency, and sustainability.
<b>Timeline:</b> 5-10 business days.	<b>Timeline:</b> Varies by project (typically 4-12 weeks).
Ends with a fixed-fee consulting proposal.	Begins once the proposal is approved and the engagement letter is signed.
Low-lift for staff; focused on understanding.	Collaborative; may involve training, decisions, and implementation steps.
Answers the question: <b>“What’s going on and what do we need?”</b>	Answers the question: <b>“How do we fix this and move forward?”</b>

## How the Two Phases Work Together

The Assessment Phase gives you **clarity**. The Consulting Phase gives you **change**. Together, they create a grounded path toward operations that are clear, sustainable, and aligned with your goals.

