**STAGES OF CONSULTING**

*General*

How to ensure the point of contact in the early stages of the consulting session is the real client we are working with? How to ask for clarification or for a contact with other stakeholders without being offensive?

It was stated that disappointment is often one of the consequences of failing to spell out the details of a consulting relationship. Isn’t the relationship supposed to be agreed in advance at the beginning of the project on paper or so? If that’s the case, are there still problems regarding violation?

*Establishing Rapport*

I learned from the article about the most common stages of the consulting process for statistical consulting project and that some stages of the process differ from strategy consulting process. I am curious about the first stage of the process. It says in the reading that the first stage of the process is establishing rapport. In my experience, the project was always initialized by preparing a proposal report / presentation for our potential client. Is this step not required or usually not required in statistical project?

*Identifying the Research Problem*

During the second stage of consulting, if I’m dealing with an intermediary, what are some appropriate ways to request a meeting with the real client?

*Setting Goals*

What are the differences between identifying research questions and setting goals?

Is project timeline something to bring up in the setting goals stage?

What can we ask to clarify clients’ expectation for us?

During the stage of setting goals, should we clearly tell clients what specific statistical tools to use in order to answer the question? O can we stop at suggesting a general description of actions such as: exploratory data analysis?

*Agreeing on a Division of Responsibility*

What are some strategies that help the consultant when discussing the division of responsibility?

What should the consultants do when they find they are assuming roles that are out of their responsibility?

*Reviewing what has occured / summing up*

How to properly present the results of a statistician's research to clients?

**NEGOTIATING WITH THE CLIENT**

From the authorship example given, it seems that it was only after the publication did the consultant know that he/she was not part of the authorship. Is this something that I should make clarification before the finalization stage of the project?

Among the things that should be discussed in the policy statements, would there be some aspect of cost attached to any of our projects this semester?

My last question from the reading is about the interpersonal skillsets required for the stat-consultant. In negotiating for desired consulting role, the core explained in the reading is to successfully capture client’s needs and approach the potential issue in a way that could satisfy client’s needs. Is it also possible to suggest a potential issue and persuade our clients into having those needs to negotiate for a desired role?

I don’t understand the meaning of “When there is disparity between the client and consultant in power or prestige and the difference favors the client, the consultant should try to negotiate on the basis of principle.” Specifically, what is “the basis of principle”?

Is there anything that can be done in the situation in which was described in the data blesser example (given credit when did not express so)? Does this happen a lot in consulting?

What is the best type of document to use to prevent receiving credit without approval? What situations typically ask for it, and are there any warning cues from your prior experience that we should especially look out for to avoid unwanted citations/appraisal?

**CONSULTANT’S RELATIONSHIP WITH CLIENT**

*Working with the client*

The author mentioned that interpersonal skills are as important as statistical skills but sometimes the school give little attention to it. Are there any other strategies that could help improve such skills besides the examples the author talked about ?

The reading says "Clients have multiple interests; develop a climate for agreement by first focusing on shared interests and then turn to interests that are opposed". When would the client's interest be opposed to the consultant's?

The article mentions that the introduction of new materials can often be interpreted as rejection. Before introducing these materials, should we first clarify the reasons we introduce them then?

When confronting a question to which we are not sure about the answer, how to appropriately tell the client that we need more time to figure out the solution while not affecting clients’ confidence in our statistical expertise?

Is the client always right? In the reading, we see some negotiation tactics but what is the line between leaving things as is and speaking up and initiating change?

When negotiating with clients, what should we do if we find that it is very difficult to reach an agreement?

What if my client does not want to spell out the details when I am trying to set up an agreement?

What should we do when the client is busy and is not able to be actively involved?

*Mistakes*

What if a consultant makes a mistake that they lead the project to another direction? How will they pay for the mistake?

How do you reconciliate a project that you have realized may have been done incorrectly but towards the end of the timeline of the project?

How to proceed if we realize our initial assumptions/client expectation was wrong in the middle of a complex project?

If there’s not enough time to re-do our work after the failure, can we just tell the truth? What else can we do to make up for it?

What kinds of mistakes can lead to a legitimate statistical malpractice suit in statistical consulting?

*Changing goals – data problems*

What should the consultant do if the final deliverables change for unexpected reasons as the project goes on? For example, in the middle of the project, the consultant finds out that it’s not appropriate to use one data entry that is offered by the client.

How should we communicate with our client if the data fail to address the questions of interest?

If the consultant and a client set up a goal at the first, and the consultant finds out that the goal cannot be reached due to the data in the middle of the project, how does the consultant do?

How to euphemistically tell clients that the direction of their idea may be unrealizable?

*Changing goals – client problems*

What if the client’s expectations change drastically during the end of the project when the final report is due?

If the client changes his or her expectation during the middle of the project, how should the consultant negotiate with the client?

*Disappointing the client*

If we find in the middle that we are unable to meet all of the client’s expectations, how can we communicate that to the client?

How do you deal with a situation in which you discover a finding or relationship that the client doesn’t agree with? For example, after our analysis I go to our client and say “we found a strong positive relationship between these two factors?”, but the client says “ no that is not possible that does not align with what we observed in the past”.

What should I do when the result is not what the client expected?

How to work with stakeholders that may be negatively affected by the analysis result?

**CONSULTANT’S ROLES**

*General*

What are some techniques to negotiate more favorable terms without insulting the client?

Once we identify our role in a project, how do we ensure we do not overstep our bounds?

What type of role would you like us to assume in the capstone projects? Should we assume we will be mainly working as collaborators? Have you seen examples of the other 4 roles being taken on in previous years that this course was implemented?

How should a consultant determine his or her role in a project if he or she can choose? Are there any suggestions?

How common is it to switch and transfer between consulting roles? Do you assume a consulting role based on the intentions of the client or your intuition of approaching the problem at hand?

Does a consultant always stay in one role, or in a mixture of roles?

*Helper Role*

Regarding the helper role of the consulting roles, how would we gauge the extent of help that we should provide?

*Leader Role*

If a consultant finds themselves in a leader role, how can they try to escape it and become a collaborator instead? Assuming that the client is unaware of the different roles in a consulting relationship.

What should we do when we are in the leader roles? How can we encourage our clients to become more involved?

As there are many pitfalls of taking the leader role by consultants, should we always try to convince the client to take the leader role?

*Data Blesser Role*

Is a strong worded policy statement requiring written approval of all credit lines (to solve the problem of being in a data blesser role ) feasible in all consulting projects? Is it okay to ask of the same from a client?

I have some trouble understanding the data-blesser role – should I understand it as such that consultants / statisticians should be aware of the whole data as well as all kinds of tests being run on the data, as opposed to skipping over the data-managing processes?

The author talked about five different roles that consultants are expected to assume. It seems that data-blesser role is the least favorite one. I was wondering if there are more ways to help avoid the unpleasant situation mentioned in the article and what if the strongly worded policy statement method would affect the relationship between the clients and the consultants?

The data-blesser seems to be inevitable at some point, even though there might be some policy written ahead, the consultant’s still loses creditability. What should we do if it really happens?

*Collaborator Role*

When consultant takes the role of collaborator, would it be more tricky with responsibility division?

*Teacher Role*

Does being a good consultant mean taking a role of teacher, or taking a role that combines helper, leader, data-blesser, collaborator, and teacher?

How can a statistical consultant delve into the role of teacher when they are dealing with a client who has much more prestige than they do?

More details about strategies to appropriately teach clients.

**CLIENT’S KNOWLEDGE**

In section 4.4, working with clients having varied statistical backgrounds, the author mentioned beyond giving the clients the simplest solution that they are being pushed to the “statistical wheelchair”, a consultant can “make the client walk”, or to give them more domain knowledge, if the client shows a willingness to acquire new knowledge. However, what if the new knowledge beyond their level of expertise? If we take tutoring a freshman with willingness to learn phd level of statistics as an example, do we take all the efforts to teach them everything they need to know (all the immediate classes) before they reach the phd level?

If the client has more knowledge in statistics than the consultant or has done relative research on this project, how should we do to cope with their work at the client’s level?

How should consultants negotiate for his or her role for the project if the client side already has a team or a professional who are strong in statistical knowledge?

If a client has more statistical knowledge than the consultant, is it better for the consultant to take the collaborator role than the lead role?

If you are working with several clients with different degrees of statistical knowledge, whose opinion should you weight more heavily in determining what the client wants?

When working with a client that has different statistical backgrounds, what should I do if the client keep asking questions about my work?

What’s the tradeoff between using a method/procedure within the client’s statistical sophistication and solving the problem?

How do you deal with clients that are fairly prolific researchers but are comfortable with outmoded or inappropriate research strategies?

The article mentions that as a general principle consultants should use the simplest statistical procedures with which the client is familiar. But in some situations, an unfamiliar solution may be the only approach, but that will make conveying the results tougher, how should this be balanced?

The article talks about finding the middle ground between working at the client’s level of expertise and using more appropriate but perhaps more advanced analysis. In a consulting project, should statistical consultants aim for the client’s satisfaction or the most appropriate statistical analysis?

**CONSULTANT’S KNOWLEDGE**

What are the best steps for developing domain expertise in a subject as quick and efficient as possible?

The article states that 5 or 6 statistical procedures can handle most research problems, but it doesn’t mention what they are. What are they?

How should statistical consultants deal with a statistical knowledge base that is increasing exponentially?

**INTERNAL TEAM DYNAMICS**

How to decide the roles if two statisticians want the same role.

Should we specifically assign each consultant role to individuals in the team during the discussion with clients? Or just generally discuss individual's responsibility for those aspects of the analysis?

**CONSULTING CHALLENGES**

*Cleaning Up A Mess*

More examples of cleaning up the mess to help statisticians to deal with.

The article has a section called “Cleaning Up the Mess,” where the author basically only cites grievances against him. As a consultant, what should we do in a situation where we have to “clean up the mess”?

*Developing Goals*

Sometimes the client doesn’t know what they want, how can a statistician help ensure that a product they provide turns out to be what the client wants?

Are there ever scenarios where multiple consultants work on the same project? If multiple consultants work on the same project, how are the roles different than if only one consultant worked on the project?

*Saying “No”*

When must a consultant not collaborate with a client?

If there are potential ethical violations on the client’s side, how should we respond?

*Work-Life Balance*

How to balance our live with the work? I’ve taken my internship as a consultant for about two weeks, and it’s already made me exhausted.

**CONSULTING IN ACADEMIA**

I have a specific question for you and hope it is not rude: as a college professor, how do you select the consulting project you want to do? Will university step in and limit the time you spend on consultation (because it feels like a side job for me?)

Why does the academe grant the same amount of reward to both statistical consulting jobs and non-statistical jobs? To me the work differs a lot and the working intensity are also not comparable.

Are statistical consultants still often hired in academia these days? Or has a divide emerged between statistical faculty (in academia) and consultants (in the corporate sphere)?

In the last part, the author mentioned that sometimes statisticians failed to request joint authorship when it is clearly well deserved and also suggest consultants to be assertive about this aggressive and ongoing campaign. How would statistician seek academic integrity without hurting the clients feelings? What if the clients are reluctant to put joint authorship? When is a good time to bring this issue to the clients?

**CONSULTING IN INDUSTRY**

How else are industry-experienced individuals evaluated, in the case that they are interested in working both in academia and in industry?

This paper mentions several examples about academia consulting. But in the business consulting situation, should we expect the same procedures?

What is the difference between statistical consulting in a university and statistical consulting in the industry?

**MSP CAREER PATHS**

My goal in the aspect of the career path is to work at strategy consulting firm as a consultant with statistical knowledge and skillset. How is working at strategy consulting firm as data analyst different from working at data consulting firm as data consultant? Will the processes and key things to do at each stage be different?