

INSTRUCTIONS

On this worksheet, capture your understanding of these aspects of an important consulting opportunity you are now involved in.

PARTNERSHIP AGREEMENT WORKSHEET

Example questions:

- What are the specific objectives of this opportunity?
- What changes do you expect to see as a result of our work together?
- Who else is involved that we should talk to in an effort to include all appropriate stakeholders?
- What do you see as your role in this effort?
- Who will be responsible for planning and executing the strategies that we have discussed?
- Who will be responsible for owning and communicating the objectives and process for the strategies we identify?
- What "resources" are available to support our efforts?
- How will we engage others in this effort?
- What are the specific tasks and activities we need to accomplish for success?
- What is the timeframe associated with this effort?
- How will we know we are successful?
- Can you describe what success looks like?
- How does this work connect to strategic efforts for healthcare that is safe, healthcare that works, healthcare that leaves no one behind?

Clarify the Scope of the Opportunity:

Define Expectations and Assumptions about the Opportunity:

Define Roles and Responsibilities of the Consultant and the Business Partner for activities associated with the Consulting Opportunity:

Clarifying Opportunity Resources:

Clarifying Deliverables and Time frames:

Clarifying Measures for Success:

Define the relationship of this project to organizational strategies:

- What data has been collected to analyze this situation?
- What steps have already been taken to address this situation?
- Can you describe what this situation would look like in a desired state?
- How will we measure improvement?
- How clear are you about the root cause behind this situation?

Define Expectations and Assumptions about Assessment and Analysis Activities:

- What role do you expect to play in assessment?
- What role do you expect to play in the analysis of data collected?
- How and how often should we connect to monitor progress and report findings?

Define Roles and Responsibilities of the Consultant and the Business Partner for Assessment and Analysis Activities:

- Is the vision for change clear to all stakeholders?
- What steps have already been taken to address change management issues?
- How will we engage employees in the planning and decision-making about this change?

Define Expectations and Assumptions about Change Management and Employee Engagement Activities:

- What role do you expect to play in change management?
- What role do you expect to play in the planning and execution of employee engagement activities?
- Who else should be involved in our change management and engagement activities?

Define Roles and Responsibilities of the Consultant and the Business Partner for Change Management and Employee Engagement Activities: