**Step 1: Define and Agree** (aka Entry and Contracting)

* Build credibility and the client relationship
* Identify client and organization readiness
* Get the client’s perspective on the problem
* Define Roles
* Agree on Expectations

**Step 2: Discover and Analyze** (aka Discovery and Dialogue)

* Determine what data you need
* Identify criteria and select methodology
  + How will you gather the data?
* Collect data
* Summarize and analyze data

**Step 3: Deliver and Decide** (aka Feedback and Decision to Act)

* Deliver findings / data / feedback
* Finalize objectives and solution(s)
* Gain alignment
* Determine
  + Budget
  + Resources
  + Accountabilities
  + Timeline

**Step 4: Design and Implement** (aka Engagement and Implementation)

* Design the solution
  + Who is your team?
  + Accountability?
* Test & obtain buy-in
* Implement
* Track and communicate progress

**Step 5: Disengage and Review** (aka Extension, Recycle or Termination)

* Review the effort and evaluate success
* Make revisions/institutionalize the design
* Communicate lessons learned
* Agree on next steps
* Evaluate yourself
  + What did you learn?
  + What would you do differently?
  + How can you apply it to the next client/project?