

## 30 · Teams and operations

# Consultation Preparation Workbook

Fill in before a consultation: your situation, the decision you need, what you tried, evidence, constraints and questions, plus a tracker for acting on it after.

For: For a business owner, team lead or association manager getting ready to book a consultation who wants to leave with a clear decision, not general ideas.

Level: Beginner    Version 1.0 · 2026-09-21

## Why prepare for a consultation?

The most valuable part of a consultation is the time spent on your real problem. Arrive unprepared and much of the session goes on explaining context, recalling numbers from memory, and discovering that the real question differs from the one you brought. Arrive prepared and the session starts at the point you would struggle to reach alone.

This workbook is for you before you book any consultation, whether on marketing, AI, websites and platforms, or team organisation. Fill it in honestly, even by hand. Many people find while filling it that part of the answer was already with them, and that what they really need is help with one specific decision.

A good consultation does not start with "what should I do?" but with "here are my options, my evidence and my constraints; which should I choose, and why?"

## The seven parts

1. **Current situation.** Describe your business or team in five lines: what you offer, to whom, for how long, with which team, and what changed recently that made you seek a consultation.
2. **The decision you need.** What decision do you want to leave with? Frame it as a question with possible answers: "do we do A or B?", "which of these three comes first?", "do we continue or stop?". If you cannot frame a decision, write the problem and ask for help turning it into one.
3. **What you have tried.** For each attempt: what you did, when, for how long, what happened, and why you think it worked or did not. This spares you suggestions you have already tried.
4. **Available evidence.** What numbers, observations and examples do you have? Sales, customer messages, ad reports, recurring complaints, screenshots. Note the period each covers and what is missing.
5. **Constraints.** Rough budget, time, team, skills, existing commitments, what cannot change. Constraints are not excuses; they make advice usable.

6. **Questions.** Write all your questions, then rank them. Put the ones the decision depends on at the top. If there were time for only three, which would you pick?
7. **After the session: action tracker.** Within 24 hours, turn what you heard into actions with an owner and a date, and set when you will review the result.
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## What not to share

- No passwords or access codes for any account. If something needs to be seen, show it on screen or share a screenshot.
  - No personal data about your customers or beneficiaries (names, numbers, addresses). Share aggregated figures or hide anything identifying.
  - No confidential documents belonging to partners or others without their permission.
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## Writing the one-page summary

Once the workbook is filled in, condense it to one page. The page helps you first, because it forces you to choose what matters most. You can use it at the start of the session, or share it in advance if the booking process gives you a way to do so.

## Consultation prep summary (one page)

### Consultation prep summary

Name: [...] Business/organisation: [...] Consultation area: [...] Date: [...]

#### 1) The situation in five lines

[what we offer, to whom, for how long, with which team, what changed recently]

#### 2) The decision I want to leave with

[a question with possible answers: A or B? / which comes first among ...?]

#### 3) What I have tried

[attempt] — when and for how long: [...] — what happened: [...] — my reading: [...]

#### 4) Available evidence

[evidence] — period: [...] — what is missing: [...]

#### 5) Constraints

Rough budget: [...] Time: [...] Team and skills: [...]

What cannot change: [...]

#### 6) My questions, ranked

1. [the question the decision depends on]

2. [...]

3. [...]

If time allows: [...]

#### 7) What a successful session means for me

[e.g. I know which of the two options to choose, and the first three steps]

## Worksheet

### 1) Current situation

What do you offer, to whom, for how long, and with which team?

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What changed recently that made you seek a consultation now?

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## 2) The decision you need

Write the decision as a question with possible answers.

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Which options are you considering, which do you lean towards, and why?

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## 3) What you have tried

List previous attempts. For each: what, when, and what happened.

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## 4) Evidence

What numbers, observations and examples do you have, and what period do they cover?

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What information do you wish you had but do not?

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## 5) Constraints

Budget, time, team, and commitments that cannot change.

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## 6) Questions

Write all your questions, then number each by how much the decision depends on it.

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## 7) Success criteria

What must you know or decide by the end of the session to call it a success?

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## During the session

- Start with the decision you need, not the full history of the business; details come when asked for.
- Take notes in your own words, with a separate column for things to do.
- If you hear advice that does not fit your constraints, say so straight away; it steers the discussion towards what you can actually apply.
- Before the end, restate the decision and next steps aloud to check you understood them as intended.

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## After the session: action tracker

Most of a consultation's value is lost in the following week, when daily work returns and notes are forgotten. Fill in this table within 24 hours and review it weekly.

| Step | Why (link to the decision) | Owner | Due  | Done signal | Status                                       | Review note |
|------|----------------------------|-------|------|-------------|----------------------------------------------|-------------|
| [..] | [..]                       | [..]  | [..] | [..]        | [not started / in progress / done / dropped] | [..]        |
| [..] | [..]                       | [..]  | [..] | [..]        | [not started / in progress / done / dropped] | [..]        |
| [..] | [..]                       | [..]  | [..] | [..]        | [not started / in progress / done / dropped] | [..]        |

What decision did you leave the session with, in one sentence?

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When will you review the result, and which number or signal will you judge it by?

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Which questions are still open?

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## Completed example

### Illustrative example

**The owner:** Salma, founder of Lemon Blossom (زهرة الليمون), a home-based business making natural handmade soap in Batroun, selling through Instagram and WhatsApp orders. All figures are illustrative.

### 1) Situation

We sell natural soap and skin oils to women aged 25 to 45, mostly in the North and Beirut. We started three years ago. The team: me and my sister part-time. What changed recently: orders from outside Lebanon have started arriving, and answering WhatsApp by hand takes two hours of my day.

### 2) The decision

"Do we build a simple online shop in the next three months, or improve WhatsApp ordering and postpone the shop for a year?" I lean towards the shop, but I am not sure demand justifies the effort.

### 3) What I have tried

- A catalogue link on WhatsApp for six months: it helped a little, but questions about prices and shipping continued.

- Saved replies for two months: they saved some time, but orders from abroad need a shipping conversation every time.

#### 4) Evidence

- Monthly orders for the last six months from the order book: between 60 and 85.
- Orders from abroad: 4 in the first month, 11 in the latest.
- Screenshots of the most frequent questions (with customer names and numbers hidden).
- Missing: I do not know how many people asked and did not buy.

#### 5) Constraints

A limited budget this year. Nobody on the team can build websites. I cannot give the new project more than five hours a week. Handmade production cannot double before summer.

#### 6) Ranked questions

1. Based on these numbers, is an online shop premature?
2. If we build one, what is the minimum that solves the repeated questions and shipping abroad?
3. How can I measure how many people asked and did not buy, before deciding?
4. If time allows: can AI help with replies without the messages losing their personal touch?

#### 7) Success criteria

I know which option to choose, the first three steps, and when to review the decision.

#### Action tracker after the session

| Step                                                             | Why                                             | Owner          | Due               | Done signal                               | Status      |
|------------------------------------------------------------------|-------------------------------------------------|----------------|-------------------|-------------------------------------------|-------------|
| Log every enquiry that did not become an order, and why if known | To size lost demand before deciding on the shop | Salma's sister | Daily for a month | A simple completed table                  | In progress |
| One page explaining shipping abroad with costs and times         | To cut the most time-consuming question         | Salma          | End of the week   | Page link in saved replies                | Done        |
| Review the decision after a month with the new numbers           | To settle shop versus postpone                  | Salma          | In 30 days        | Written decision in the business notebook | Not started |

#### Common mistakes

- **Mistake:** arriving with a general question like "how do I sell more?". **Fix:** frame a decision between specific options, or ask outright for help turning the problem into a decision.
- **Mistake:** hiding what you tried and what failed. **Fix:** failed attempts are some of the most valuable evidence; share them with your reading of why.

- **Mistake:** quoting numbers from memory. **Fix:** gather the evidence before the session, with the period it covers.
- **Mistake:** leaving out constraints, then rejecting advice as "unrealistic". **Fix:** write constraints in advance so advice fits you.
- **Mistake:** sharing passwords or customer data. **Fix:** show things on screen and hide anything identifying.
- **Mistake:** twenty unranked questions. **Fix:** rank questions by their effect on the decision, and start with the most important.
- **Mistake:** leaving the notes in the notebook afterwards. **Fix:** an action tracker within 24 hours, with owners, dates and a review date.

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## Checklist before booking and after the session

- ☐ I described the current situation in five lines.
- ☐ I framed the decision as a question with possible answers.
- ☐ I wrote down what I tried, with the result and my reading of it.
- ☐ I gathered evidence and noted the period it covers and what is missing.
- ☐ I wrote my constraints clearly: budget, time, team and what cannot change.
- ☐ I ranked my questions by how much the decision depends on them.
- ☐ I defined what a successful session means for me.
- ☐ I removed passwords and personal data from anything I will show.
- ☐ I condensed everything into a one-page summary.
- ☐ After the session: I filled in the action tracker within 24 hours.
- ☐ I set a date to review the result.

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**About the author** — Mohamad Charafeddine is an entrepreneur from Tripoli, Lebanon: founder of the Passion digital marketing agency, president of Takaful Youth Association, and founder of digital platforms. He trains individuals and teams in applied AI and marketing.

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