

## **Stat 998, Fall 2015 (Larget)** **Observing and Evaluating Consulting Sessions**

The purpose of this handout is to help you prepare for observing a first consulting session. The items listed here should be viewed as guidelines. Feel free to consider other issues that you feel are important.

### **Gaining understanding and determining goals:**

1. Did the consultant do a good job at determining the science background of the problem including prior work done in the area?
2. Did the consultant appear to have a sufficient grasp of the scientific issues underlying the problem?
3. Did the consultant do a good job of determining the specific design of the study and those aspects of its implementation that might affect the subsequent data analysis?
4. Was the consultant able to determine if the client had important questions or concerns beyond those that s/he initially stated as the major goals?
5. Did the consultant offer ideas and/or proposals to obtain the client's reaction?
6. Did the consultant gain a sufficient understanding of constraints — if there were any?
7. Were the goals of the client crystal clear to the consultant by the end of the session?

### **Communications and interaction:**

1. Was the client made to feel reasonably comfortable?
2. Was the pace of the session appropriate — neither too fast nor too slow?
3. Was the consultant able to ask probing questions in a reasonably diplomatic way?
4. Was the discussion one between equals or was there an imbalance?
5. Were both parties able to communicate easily with each other or did jargon and/or complex terminology get in the way?
6. Did anger, fear, shyness, exasperation, *et. cetera* interfere with the success of the session?
7. Were there any uncomfortable moments as revealed by body language or nervous habits?
8. Was the consultant a good listener?
9. Did the consultant make use of “play-back” techniques in an appropriate way?

10. Was the consultant able to determine the clients statistical background and aim the advice and proposals accordingly?
11. Did the discussion stay appropriately focused on the main issues or was there wasted time?

**Accomplishments, results, and conclusions:**

1. Did the client gain new insight into her/his problem or did the discussion focus primarily on statistical techniques?
2. Did you get a sense that the client was a practitioner of “good science”?
3. How far did the consultant get in proposing methods of analysis appropriate for the problem?
4. Did the proposed statistical approach seem reasonable?
5. Was there an appropriate emphasis on finding the simplest analyses that satisfactorily address the issues?
6. Did the consultant provide the client with tradeoffs and options?
7. Was sufficient emphasis placed on exploratory and graphical analysis?
8. Did the consultant make clear the importance of assumptions in the choice of analysis?
9. Were the results of the session adequately summarized and was it made clear what the next steps should be?
10. How do you think that the client felt at the end of the session? Was s/he reasonably pleased, perplexed, etc?
11. Did the consultant appear pleased with the conduct of the session?