



Choose Intentionally: How to Select the Right Tool or Process for Your Client

Being systematic in selecting tools and processes that best fit the client (either an individual or group) and the situation is as important to the school improvement consultant as having a variety of tools and processes from which to choose. This resource provides a set of questions to guide you in selecting the right tools and processes to help the client accomplish the variety of tasks necessary to achieve their intended outcomes.

Questions to Guide Selection of Tools and Processes

Questions	Guidance
1. What are you trying to accomplish?	As the saying goes, “If you don’t know where you’re going, any road will get you there.” When you are clear about the objective of the engagement, you are better equipped to select tools and processes that will help the client accomplish their intended outcomes.
2. Of the possible tools or processes that are aligned to the objective, which seems to be the best fit?	Your initial decision about which tool or process to use should be based on how well the purpose of the tool or process fits with what you want to accomplish and the time and other resources available. Using a specific tool or process without adequate time to introduce, work through, and debrief it may be counterproductive to helping the client achieve their intended outcomes.
3. Is the tool or process ready to use as is? Or does it need to be adapted?	Consultants often need to fine-tune a tool or process to meet the specific objectives and contexts of the client.
4. Do you have experience using a similar tool or process?	Experience using a tool or process helps you understand the nuances of how it might work in a group (e.g., where people get tripped up), but that doesn’t mean you should shy away from trying new tools or processes if they are a good fit for the client’s need. Before using a tool or process that is new to you, be sure to do a test run to better understand how it might work with the client.
5. Does the client have experience using a similar tool or process?	A client’s level of experience will have implications for the time needed to use the tool or process. If clients have little or no experience, it is often helpful to introduce the tool or process by providing an example of its use or just enough background information to set the client up for

	<p>success. You might need to allow more time when the client is using a tool or process for the first time if the client is not familiar with the format or content of the new tool or the steps in the new process. If the client has a great deal of experience with the tool or process, consider whether it might be time to introduce a new tool or process to increase engagement or expand the client's toolbox. If you decide to use the "tried and true" tool or process, watch for signs that the client is less engaged with its use because of overfamiliarity.</p>
6. Is using the tool or process a good use of the client's time and effort?	<p>The goal is to optimize the results of using the tool or process. To accomplish this goal, know and account for how the client typically understands or engages in similar activities. Check that the tool or process you are using is just what's needed—not more than or less than what's needed. In other words, don't use a complex tool or process when a simple one will do or a simple one when the objective requires deep thinking and a series of interrelated actions.</p>
7. Will using the tool or process have benefits in addition to achieving the desired outcome?	<p>Achieving the objective is the most important outcome, but tools that both achieve a desired outcome (e.g., making a decision or deepening understanding of an issue) and increase the engagement of the client are desirable. For added client benefits, consider whether the tool or process you will use will help to improve relationships within the client system or between you and the client.</p>
8. Is the tool or process compatible with the client's norms and practices?	<p>You cannot make the best decisions for which process and tools to use without attention to the culture and norms of the client. Your decision might be based on the client's context (e.g., a school located in an urban area versus a school in a geographically remote area), the practical norms of the system (e.g., how positional authority is treated), or how the group likes to work (e.g., some groups love process while others just want to do the work and move on).</p>
9. Will the client be able to adopt or adapt the tool or process for future use?	<p>Building capacity is an ultimate aim of school improvement consulting and leadership coaching. If possible, select tools the client can learn from and use in the future.</p>

Tool or Process Selection in Action: Example Scenario

The following scenario illustrates how a consultant might use the questions to select tools and processes for an engagement with a school improvement team.

Emily is preparing for a meeting with the school improvement team at High Prairie Middle School. She's worked with the team for a few months as they conducted, analyzed, and interpreted the data from a needs assessment. The focus for this meeting is on prioritizing identified needs.

This is the first time that the team has been involved in such activities. Before this year, the principal worked with the assistant principal to develop the school improvement plan and then shared it with the core content area department chairs. The school has a new principal who believes in shared leadership and is an active, but not dominant, member of the school leadership team. The principal's goal is to develop a culture in which responsibility for student learning is accepted and shared among all staff members.

Emily has worked with several teams on interpreting data to identify and prioritize needs and has used several different tools and processes. She asks herself the following questions to decide which tools and processes will be best to use with the High Prairie team:

Questions	Emily's Response
1. What are you trying to accomplish?	The goal for the meeting is to prioritize the needs identified from the needs assessment data.
2. Of the possible tools or processes that are aligned to the objective, which seems to be the best fit?	<p>Two possibilities are dot voting and using a decision matrix. Dot voting is useful when prioritizing a brainstormed list, when the decision is easy to make, or when the goal is to quickly decrease the number of options. When the decision is more complex, the decision matrix is useful. The client must identify and consider the criteria that the options must meet and determine how well each option fits the criteria.</p> <p>The decision matrix will be best for prioritizing improvement needs. The client will benefit from thinking about the factors that are important to them in selecting where to focus their improvement efforts.</p> <p>We have 1.5 hours for the meeting, which will be enough time to explain the tool, use it to prioritize the needs, and conduct a quick debrief of the process.</p>

3. Is the tool or process ready to use as is? Or does it need to be adapted?	<p>It can be used as is. The decision matrix includes an area to list the options and criteria and assign weights to each criterion if the client considers some criteria more important than others. Each option is rated on a scale (e.g., 1–4) of how well it meets each criterion. That amount is multiplied by the weight for each criterion, and the total for each option is computed.</p> <table><tr><th>Option</th><th>Criterion 1 Weight =</th><th>Criterion 2 Weight =</th><th>Criterion 3 Weight =</th><th>Total Points</th></tr><tr><td>Option 1</td><td>Rating x Weight =</td><td>Rating x Weight =</td><td>Rating x Weight =</td><td></td></tr><tr><td>Option 2</td><td></td><td></td><td></td><td></td></tr><tr><td>Option 3</td><td></td><td></td><td></td><td></td></tr></table>	Option	Criterion 1 Weight =	Criterion 2 Weight =	Criterion 3 Weight =	Total Points	Option 1	Rating x Weight =	Rating x Weight =	Rating x Weight =		Option 2					Option 3				
Option	Criterion 1 Weight =	Criterion 2 Weight =	Criterion 3 Weight =	Total Points																	
Option 1	Rating x Weight =	Rating x Weight =	Rating x Weight =																		
Option 2																					
Option 3																					
4. Do you have experience using a similar tool or process?	<p>I have used the decision matrix many times and am aware of the types of problems people have when using it for the first time. I will anticipate these potential problems (e.g., deciding whether to assign different weights to the criteria) when I plan my facilitation. I will listen and watch for verbal and nonverbal cues that participants are having difficulty with the tool or process. For example, some members of the team might feel that using the decision matrix is too clinical and that numbers are dictating the decision.</p>																				
5. Does the client have experience using a similar tool or process?	<p>The team has used dot voting and decision trees in their professional learning communities, but they have not used a systematic process to make decisions that affect the whole school. They do not have experience using the decision matrix. I will use a simple example to illustrate how to use the decision matrix. I anticipate that identifying the criteria might be the most difficult part for them, so I will emphasize that part in the example and be prepared with some possible criteria they might use for their decision matrix if the group is struggling to come up with ideas.</p>																				

6. Is using the tool or process a good use of the client's time and effort?	Yes, the tool and the process for identifying decision criteria are worth the time and effort. Team members will be able to advocate for the needs that they feel best meet the criteria and will have opportunities to explain other factors that are influencing their decision-making. This will make the team more aware of what influences their decisions. The discussion about the criteria and how well each option fits the criteria will reveal what is important to various team members and what influences their decisions. It will make the decision-making process more transparent.
7. Will using the tool or process provide benefits in addition to achieving the desired outcome?	Yes, team members will need to be actively engaged in discussing the decision criteria and how well each option meets those criteria. This will help to build trust within the group.
8. Is the tool or process compatible with the client's norms and practices?	The tool might take team members outside their comfort zone to some degree because they previously had a limited role in decision-making. They don't have a lot of experience with norms of collaboration. This means it will be important to review the team's norms at the beginning of the meeting and to point out the roles the norms will play as we use the decision matrix.
9. Will the client be able to adopt or adapt the tool or process for future use?	Yes. As part of the meeting wrap-up, we'll discuss the team's experience using the decision matrix and how they might use it in the future.

Use the guidance provided at the beginning of this resource and the template below as part of your planning for client engagements.

Question	Response
1. What are you trying to accomplish?	
2. Of the possible tools or processes that are aligned to the objective, which seems to be the best fit?	
3. Is the tool or process ready to use as is? Or does it need to be adapted?	
4. Do you have experience using a similar tool or process?	
5. Does the client have experience using a similar tool or process?	
6. Is using the tool or process a good use of the client's time and effort?	
7. Will using the tool or process provide benefits in addition to achieving the desired outcome?	
8. Is the tool or process compatible with the client's norms and practices?	
9. Will the client be able to adopt or adapt the tool or process for future use?	