



SPECIALIST WORKFLOWS

Consulting engagement plan

A planning worksheet for defining the problem, working cadence, stakeholder roles, evidence, milestones, recommendations, and a useful closeout.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

A consulting engagement needs a clear operating plan.

WORK THROUGH THE CHECKLIST☐ **01 Define the client problem**

☐ **02 Name sponsor and stakeholders**

☐ **03 Set working cadence**

☐ **04 List evidence needed**

☐ **05 Map milestones**

☐ **06 Plan final recommendations**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.