

How to write a consulting brief

A consulting brief is a document that helps convey your expectations and objectives to the potential Consultant. The goals of such a document should be to allow you find out what solution a Consultant proposes, how much it will cost and how long it will take.

A brief can covers all types of projects and can range from a small document to a large one. A brief for a small project may require little more than a few lines in an email whereas a brief for a large project, which may take the form of an invitation to tender (ITT), can be anywhere from 2-300 pages; there is no correct length: it should be only as long as it needs to be to convey your requirements. Be careful when writing your brief, however, to explain your ideas fully; what may seem obvious to you is not necessarily obvious to anybody who doesn't know your business and your ways of operating.

The response to your brief from a Consultant will, naturally, reflect the brief that you provided, which is why it is crucial that you provide the right information for the Consultant to work on. A well-written brief offers two important advantages:

1. It demands that "in house managers" clarify the project's business objectives at the start
2. It gives both you and the Consultant a summary of key points to refer to later on.

Keep the brief as short as possible but realise that its purpose is to provide enough information for a Consultant to assess the proposed assignment practically without discouraging creative exploration.

To see an example of a recent Consulting Brief go to www.ifec.biz/Consultant_brief.pdf.

If you plan to use the IFEC Consulting Agreement as the basis of your contract this Brief will form part of the Agreement.

Your brief should include the following sections:

1. Corporate profile

Never assume what a consultant may or may not know about your business. It is advisable to provide a consultant with background information about your business.

2. Market position

Create a brief and realistic evaluation of your organisation, service, or brand as it relates to your competitors.

3. Current situation / what are perceived issues and problems

Explain the circumstances that lead to the need for the project. Don't forget to include any past consultancy done on this topic and a summary of background information from any previous work.

NOTE: As tempting as it may be, avoid writing the solution in this section; it is preferable for the Consultant to propose a solution. This will ensure you get the widest range of ideas based on the Consultant's experience- particularly if you are recruiting by Competitive Tender.

4. Objectives

This section should set out the aims of the project. This is the key section of the brief: the Consultant will defer to this section to decide exactly what you want to achieve from this project. Try answering the following questions as a way of helping you focus:

- What do you want to achieve through this project?
- What problem has given rise to this project?

- What decisions you want to make?

Keep an open mind when writing your brief and feel free to make changes as new ideas/information come to light. Your brief isn't set in cement until you have contracted a consultant (and even then, changes can be made by mutual agreement).

5. Project scope

The project scope defines what is or isn't included in the project.

"Project Scope Management includes the processes required to ensure that the project includes all the work required, and only the work required, to complete the project successfully. It is primarily concerned with defining and controlling what is or is not included in the project"

- *Guide to the Project Management Body of Knowledge (PMBOK)*

To complete this section effectively, break the project down into sections: What has to happen first? What is the next logical step? This section is effectively building the project block by block. Once you have identified each component of the project you should assign it a realistic time-frame as a guide.

This will be invaluable as the project progresses, both in monitoring the progress of the project and in setting 'milestones' where progress payments should be made.

6. Deliverables

This section, as its name implies, outlines exactly what the Consultant is required to deliver at the end of the project, and may include such things as:

- presentations (in person, via telephone, via video-link);
- written reports;
- databases;
- spreadsheets;
- CD's/DVD's;

or whatever you require. The deliverables are the final product that addresses the objectives specified earlier. This is what you are paying the Consultant for.

7. Schedule and deadline

Give the consultant a time frame in which you would like to have the work completed. If the time-frame is critical you should clearly specify this.

8. Technical and practical constraints

Now ask yourself if the consultants have to stay in certain parameters. If there are inflexible parameters, state them up front. Typical project constraints are scope, time and budget. Specific projects may have their own particular constraints, however, and these should be included here.

9. Submission requirements

This may include start and end dates; dates each section is to be completed; preferred payment schedules/amounts and or any other specific requirements you may have.

See an example at www.ifec.biz/Consultant_brief.pdf.

10. Selection criteria

This is a detailed and specific list of the criteria by which firms will be chosen. Remember, 'value' does not always mean 'cheapest'. Determine what matters most in choosing a Consultant to do the job and list those qualities here.

How to choose a Consultant

The following sections, although not part of your Consulting Brief, are provided in order to help you select a Consultant:

Decide how to invite a response

Now you can choose to either send your brief to a Consultant you wish to use or make the brief a competitive tender, either by invitation or by advertising for expressions of interest. It is usual, when inviting tenders, for three firms to be invited to tender. If you are inviting tenders, let each know that the tender is competitive and be sure that all of the Consultants competing for the tender meet your selection criteria.

Evaluate the proposals

Once you have received responses to your brief investigate whether they sufficiently answer your brief and ensure that they understand the issues involved. The most efficient way to do this is to ask:

- Have they offered an appropriate solution?
- Have they answered all aspects of the Brief?
- Do they have the resources and experience required?
- Is the fee acceptable?
- What alternative methodologies have they offered?

If this is the first time you are using this Consultant, it is advisable to invite them to give a presentation, demonstrating their skills and past experience. This is a great way to get to know the Consultant better. The more comfortable you feel with the agency and vice versa, the more positive the result will be.

Select the Consultant

It is good business practice to respond to the agencies that were not selected to undertake the work. Providing these firms with feedback will help them in the future. It is also advisable to confirm the expected service (e.g. timing, methodology, price, deliverables, and changes made in discussions) with the successful firm. Such a confirmation should always be put in writing.

Naturally, we recommend that you always invite tenders only from IFEC Members, as IFEC Consultants are Quality Assured and offer a range of free benefits to ensure your project goes smoothly, and to deal with any problems that may arise.

Sign a contract

Signing a contract protects both parties from misunderstandings and can help resolve disputes. We have provided a Sample Contract (<http://www.ifec.biz/consulting-agreement.pdf>) for anybody to download and amend to their own requirements. This has been designed to dovetail with your Brief.