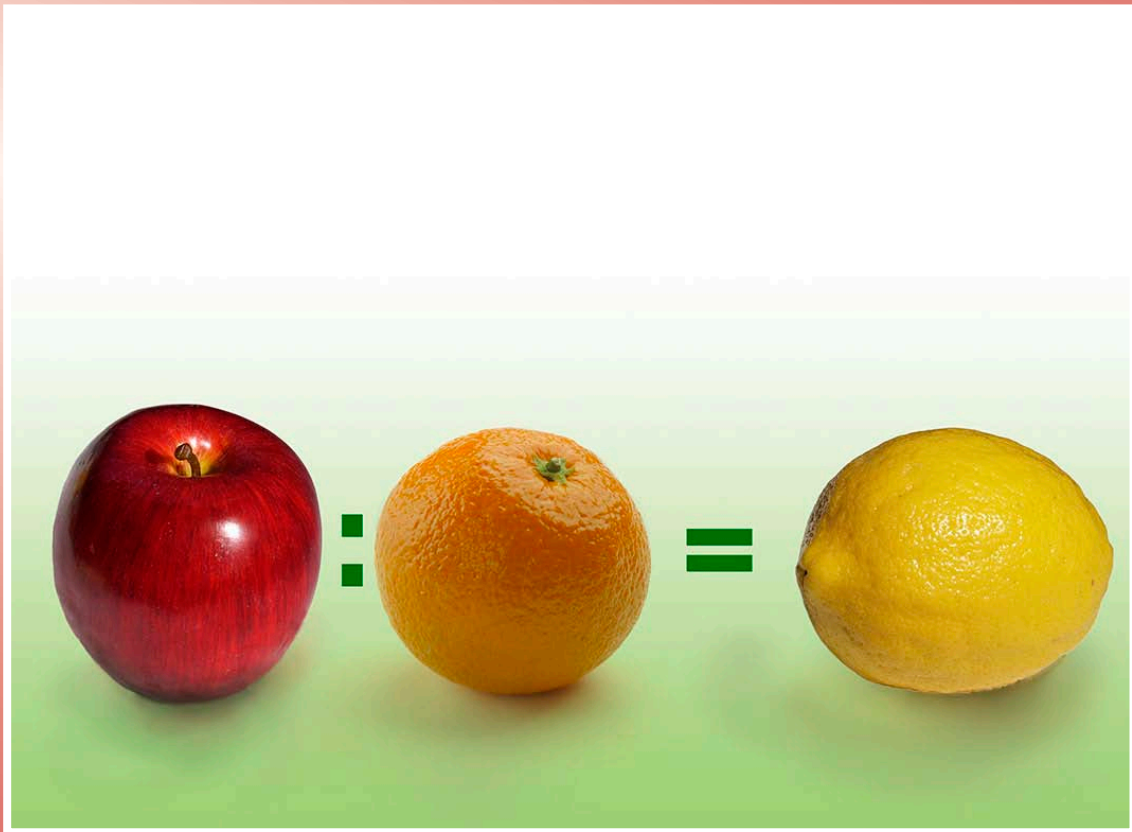


Business Management & Training Series

# How To Write a Consultancy Brief & Select the Right Consultant

By Rob Tonge



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Thank you for downloading the sample chapters of *How To Write A Consultancy Brief & Select The Right Consultant* published by Gull Publishing. This excerpt includes the Table of Contents and the first chapter, which overviews the book.

We hope you find this information useful in evaluating this book.

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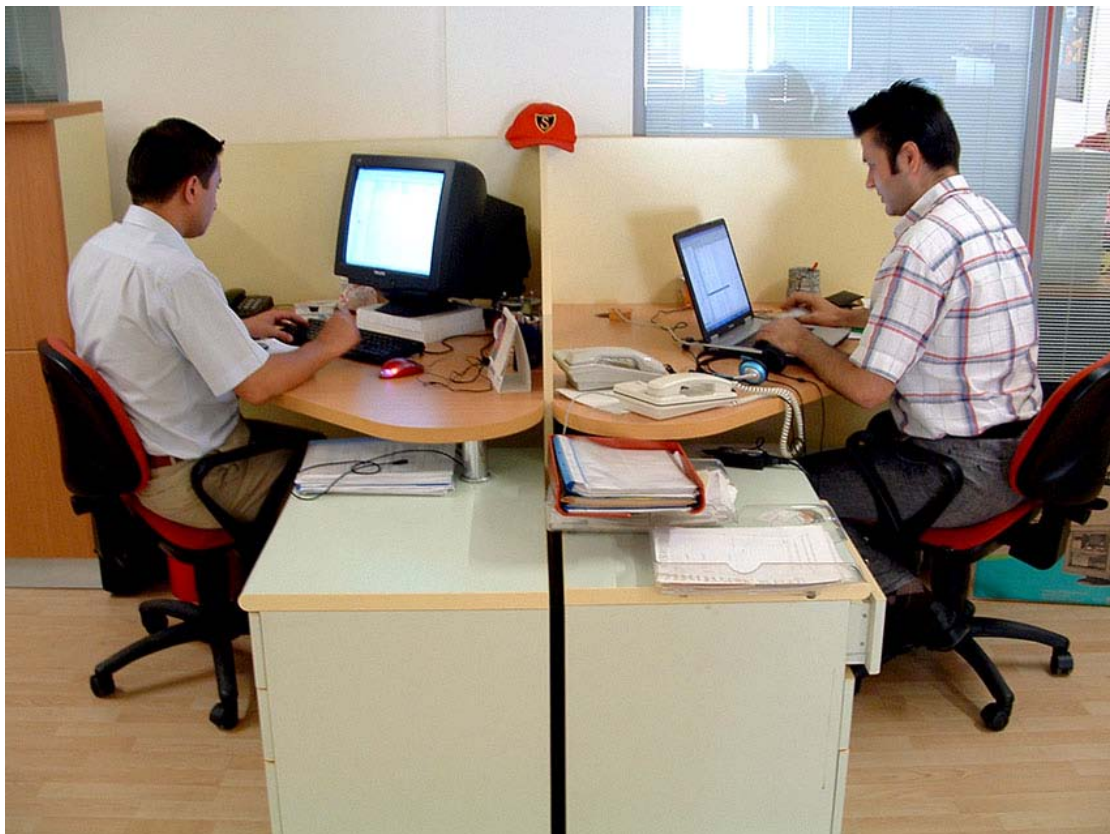
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# 1

## Introduction

### CHAPTER ONE

**D**uring the past decade the consultancy profession worldwide has experienced rapid growth. In Australia, this growth is currently estimated to be around 15% per annum.

In the evolution of consulting during this period, the traditional dominance of large multi-national firms has given way to the emergence of many sole practitioners and small partnerships offering highly specialised services in over 130 different fields of expertise, as shown on page 9 - and this list is not exhaustive.

In parallel with growth in the provision of consulting services, the need for increased efficiency, productivity and innovation, together with rapid advances in technology and the requirement for specialist expertise on a 'one-off' basis, is resulting in much wider use of consultants by private enterprise and all levels of government.

But, as with any sector of business experiencing rapid growth, the consultancy profession has not been without its difficulties. In recent years there has been mounting criticism - much of it public - about standards of performance, excessive fees, and lack of professionalism.

Part of the underlying problem is that with the exception of consulting disciplines requiring formal qualifications, for example, engineering, architecture, surveying, virtually anyone can set themselves up as a consultant regardless of skills, qualifications or experience. Furthermore, there is no universal accreditation system.

While it can be argued that national associations representing various sectors of the profession set standards for membership, in some instances membership of these organisations is not necessarily an indication of competence.

Also, there are many highly skilled consultants who are ineligible for membership of these associations simply because of the particular specialist field in which they work, and/or because they do not hold academic qualifications. As well, a large number of specialist fields are not represented by professional associations.

From a client viewpoint, these issues, together with the ever-increasing range of specialist services being offered, can make the choice of an appropriate consultancy firm for a particular project a challenging exercise.

On the other hand, the whole issue of selection is exacerbated because many client organisations have a misconception of the consultant's role, and tend to take an ad hoc approach to the selection process, lacking the 'how to' knowledge of evaluating consultant proposals, the right questions to ask, and the additional information that should be obtained during interviews.

Too often a consultant is engaged at face value without adequate probing of capability and experience, and without having their references checked, despite the fact that the appointment usually involves substantial financial outlay.



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Another key issue in the use of consultants is accountability. One complaint sometimes made by clients is that consultants do not assume sufficient responsibility for results, for the reason that a consultant can depart at the completion of a project, irrespective of the results or other outcomes.

Nevertheless, there is now the need for consultants to be far more accountable and responsible.

Depending on the type of project, some clients are including in their briefs the requirement that consultants become involved in implementation of their recommendations, and in appropriate situations, take greater responsibility for the project outcomes.

## WHAT INTENDING USERS OF CONSULTANCY SERVICES SHOULD KNOW

If the right consultant is to be selected to produce the right project outcomes, clients should at least know:

- **Types of consultancy services available.**
- **The role of a consultant.**
- **What a consultant can and cannot do.**
- **What the consulting process entails.**
- **How to efficiently conduct the selection process.**
- **The consultant's experience in the particular sector of business or industry.**
- **How closely the consulting services offered, match the needs of the organisation.**
- **How to manage the consultant/client relationship.**
- **How to evaluate the performance of both the consultant and organisation when the project has been completed, and why this evaluation is essential.**

Engaging the right consultant is a matter of knowing why you need to appoint a consultant and what you want to achieve, giving careful consideration to the selection process, and establishing a client/consultant relationship that fosters the best possible performance from the consulting personnel appointed to the job.

## THE NEED FOR A CONSULTANT SELECTION PLAN

With the increasing use of consultancy services by both the private and public sectors, any organisation which is a regular or intending user of consultants should have a plan of action in place as part of the organisation's overall policy or operating procedure.

Relatively few organisations have an effective practical plan for the appointment of consultants. Those organisations that have endeavoured to address this issue frequently tend to produce guidelines that, although going part of the way, fail to address all the key aspects necessary to ensure the right selection decision is made.

In most cases existing guidelines focus solely on preparation of consultancy briefs and engagement contracts, whereas, the plan of action should be one that provides for the following standard procedures:

- Analysing and defining the problem or need.
- Identifying if there is a requirement to engage a consultant..
- Evaluating consultant proposals to arrive at a shortlist of suitable consultancy firms.
- Planning, arranging and conducting interviews, including:
  - ◇ Who will be on the interview panel
  - ◇ Preparing a question list
  - ◇ Identifying issues to be probed
- Making the final selection.
- Finalising the contract.
- Notifying unsuccessful consultancy firms.
- Managing the project and liaising with the consultant.
- Evaluating performance of both the consultant and client organisation on completion of the project.

It is only by establishing a plan of action that the risk of making wrong decisions can be minimised.

## THE AIM OF THIS MANUAL

This manual has been compiled to assist organisations intending to engage a consultant - particularly first-time users of consultancy services, to:

- Avoid the problems outlined in this chapter;
- Develop a consultant selection and appointment plan/policy;
- Prepare an effective, clear and practical consultant's brief or terms of reference;
- Select the right expertise for the project;
- Avoid potential interpersonal conflict between the client organisation staff and the consultant; and
- Gain maximum benefit from the project – and from using a consultant.

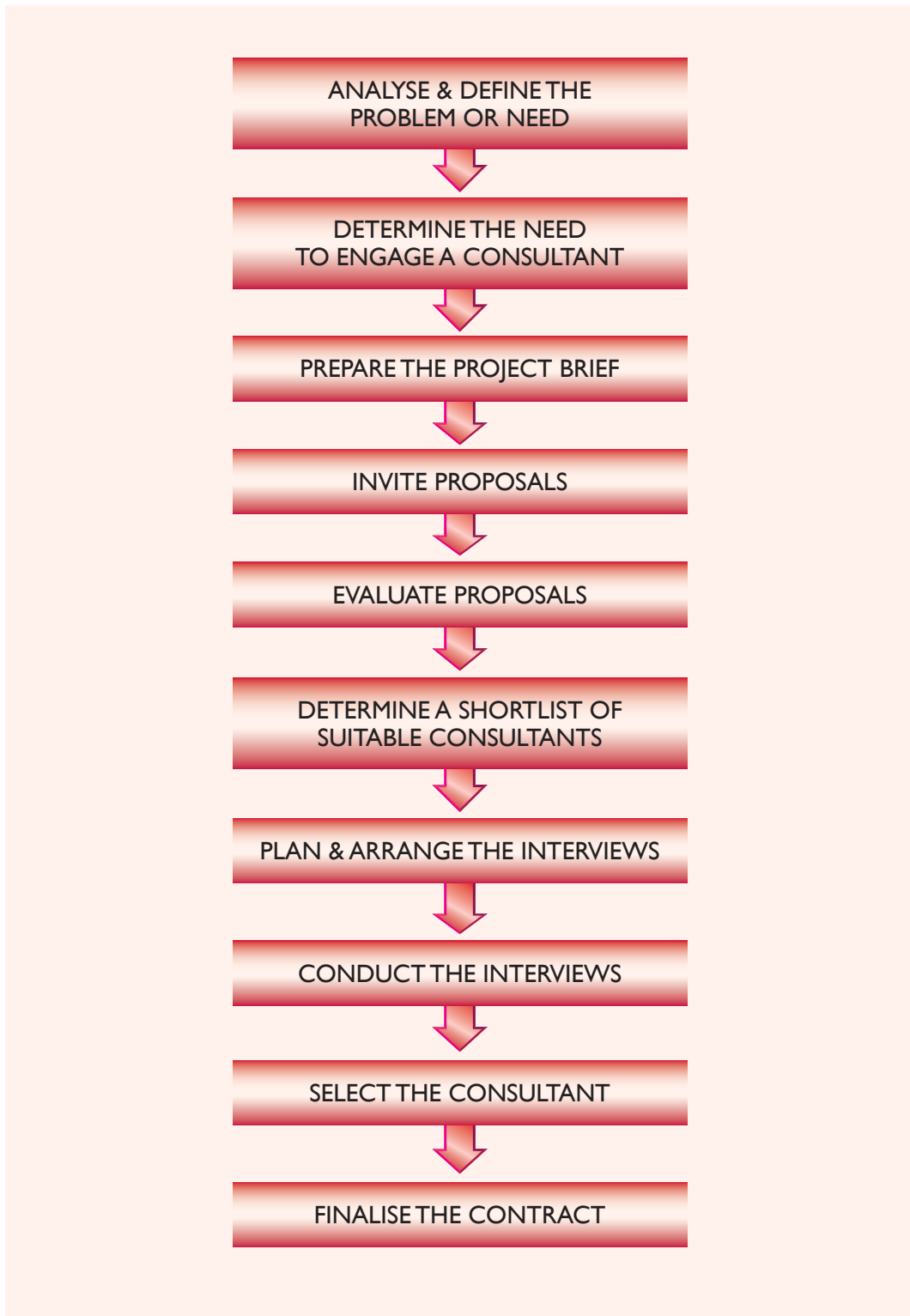
The information given in the following chapters is not specific for any particular private or public sector organisation, business or industry sector. Rather, it provides practical guidelines that can be adapted to meet individual organisational requirements. To further assist readers, summaries in the form of question checklists are given at the end of Chapters 3 to 10.

For the purposes of this manual the term 'Brief' refers to Consultancy Briefs, Terms of Reference, Tender or Quotation.

## THE EVALUATION AND APPOINTMENT PROCESS

The evaluation and appointment of an appropriate consultancy firm requires the 10 steps shown in the flow chart below.

The chapters that follow detail the various procedures involved in this process.





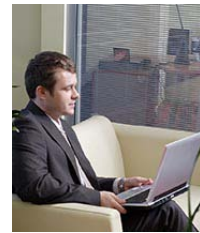
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## SOME FIELDS OF CONSULTING

Aboriginal Culture	Environmental Economics	Negotiating
Accounting	Ergonomics	Nutrition
Acoustics	Engineering	Organisational Change
Advertising	Exercise	Packaging
Aerospace	Feng Shui	Payroll
Agriculture	Financial Planning	Personal Development
Alternative Technology	Fire Protection	Personnel
Animal Husbandry	Fisheries	Planning
Antiques	Food Technology	Plastics
Aquaculture	Foreign Trade	Policy Development
Architecture	Forestry	Pollution Control
Art	Franchising	Printing
Asian Business	Freelance Journalism	Public Relations
Audio Visuals	Fundraising	Publishing
Automation	Health	Purchasing
Aviation	Horticulture	Quality Assurance
Beverages	Hospitality	Quantity Surveying
Biotechnology	Human Resources	Real Estate
Boating	Hydraulics	Records Management
Botany	Hydroponics	Recreation
Building	Image Development	Refrigeration
Business Migration	Immigration	Regional Development
Business Planning	Import / Export	Research
Career Planning	Indexing	Retailing
Catering	Industrial Relations	Retirement
Climatology	Information Technology	Safety
Colour	Interior Decorating	Security
Communications	International Property	Small Business
Community Services	International Protocol	Social Work
Computers	Internet	Sound Systems
Conferences	Inventory Management	Sport
Conservation	Irrigation	Surveying
Copyrighting	Landcare	Systems
Counselling	Landscaping	Taxation
Credit Control	Law	Technical Writing
Cultural	Lighting	Technology Transfer
Data Processing	Lobbying	Theatre
Design	Management	Total Quality Management
Development	Manufacturing	Tourism
Drug Abuse	Marine Science	Town Planning
Ecology	Marketing	Training
Economics	Media	Transportation
Editing	Metallurgy	Valuing
Education	Meteorology	Veterinary Science
Energy Management	Military	Viticulture
Entomology	Mining	Warehousing
Environment	Natural Resources	Waste Management

## 2

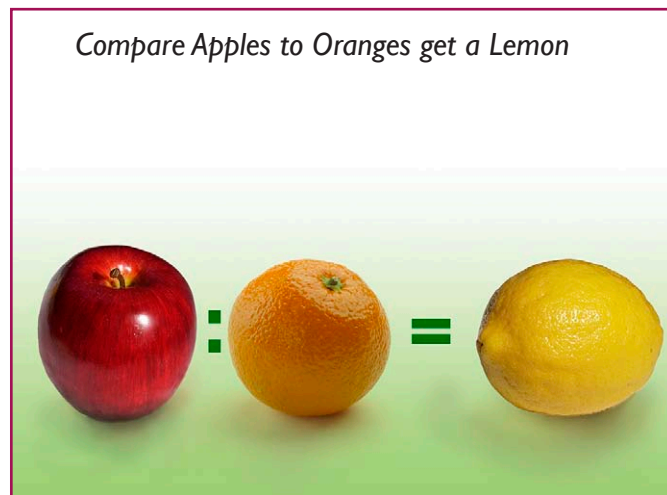
## The Consultant's Role



### CHAPTER TWO

A consultant is basically a problem-solver or agent of change - a person with specialist knowledge in a particular field who provides advice or information. A consultant can be an effective:

- Adviser
- Arbitrator
- Counsellor
- Evaluator
- Innovator
- Investigator
- Organiser
- Planner
- Strategist
- Technician
- Trainer
- Trouble-shooter



Consulting is the act of giving assistance on an as-required basis, initiated when an organisation recognises it lacks the internal resources or expertise to resolve a particular problem or need. However, a consultant is not a miracle worker, nor is he or she a substitute for poor management.

## TYPES OF CONSULTANCY ORGANISATIONS

Consultancy organisations fall broadly into six categories:

- 1) **Trans-Nationals**  
These are the large firms – some global - providing services in various fields for a wide range of business, industry and public sectors.
- 2) **Generalists**  
Generalist firms are those organisations offering a range of services within a particular field.
- 3) **Specialists**  
As the term implies, these firms provide highly specialised services within a particular field. With competition increasing in the consultancy profession, more and more firms are tending to specialise.
- 4) **Generalists with Specialist Services**  
These firms provide a range of services within a particular field, but specialise and develop their reputations in specific areas of expertise.

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