

ANNOTATED CONSULTING BRIEF

A brief a prospective consultant can examine

Fictional example: a service organization is investigating recurring approval delays. No client result, diagnosis, quote or standard engagement is represented.

Brief supplied to candidates	Why this belongs in the brief
Decision requested: help us determine why customer-change approvals repeatedly wait, and which bounded response is warranted.	Names the decision the purchase must support. It leaves the diagnosis open.
Observed evidence: in 12 permission-cleared examples from the same work type over two weeks, five requests were returned for clarification. Two records do not show who could approve an exception.	States sample and limitations. These invented observations are not a representative survey or proof of the cause.
People involved: account coordinators, operations supervisors and the sponsor authorized to settle cross-team priorities.	Names work roles and decision authority, rather than assuming HR or a consultant can approve an operating change.
Previous attempt: a new request form was introduced. We do not yet know whether people used the same version or whether approval boundaries changed.	Explains what has been tried and what still needs checking.
Initial scope: compare the selected records and role accounts, then return findings, alternatives and unresolved questions for sponsor review.	Requests reviewable work. The provider must propose its method, staffing, internal time and fee separately.
Excluded now: organization-wide rollout, personnel findings, technical implementation and guaranteed reductions in delay.	Prevents the investigation from silently becoming approval for a larger intervention.

Read alongside: Choosing a leadership consultant.

ADAPTABLE WORKING BRIEF

Prepare your own version

Use authorized, non-confidential summaries. Keep employee, customer and commercially sensitive records in your approved systems.

The recurring work problem and the decision we need help making

Evidence we can substantiate, including period, sample and missing information

Roles affected and the sponsor who can decide

What we tried and what remains uncertain

Bounded initial outputs and work excluded for now

Internal participation we can actually protect

Before sharing

Check who may receive the brief and which material needs an approved information-sharing arrangement. A prepared brief is not a request to start billable work.

PROCUREMENT SEQUENCE

Move through decisions, not an assumed timetable

The sequence below illustrates dependencies. It is not a delivery promise or a prescribed procurement policy.

Stage	What must be ready	Decision or useful output
1. Frame the need	An authorized sponsor and a bounded problem with known uncertainties.	Choose whether to investigate internally, seek outside input or stop.
2. Confirm buying constraints	Approval route, protected participation and permitted information.	Record what a supplier can reasonably propose.
3. Request comparable responses	One brief and common questions for the candidates.	Receive method, staffing, outputs, internal effort, fee and exclusions.
4. Clarify and examine evidence	Specific unanswered questions and permitted clarification process.	Record supported answers and claims that remain unverified.
5. Select and agree the work	Authorized selection and appropriately reviewed scope and terms.	Agree deliverables, prerequisites, review and change approval.
6. Check readiness to start	Named owners, available contributors and approved information arrangements.	Proceed, revise the start conditions or defer. Selection alone is not readiness.
7. Review and hand over	Agreed evidence, internal routine owner and outstanding issues.	Continue, adapt or end within actual authority.

When a dependency slips

Record the missing input, its owner and the decision it delays. Ask the selected provider what can still be delivered. Do not compensate by treating a later approval as already granted.

STAKEHOLDER INTERVIEW PLANNER

Plan whose account and evidence you need

An interview plan helps compare perspectives. It does not authorize access to confidential records or establish a root cause.

Role in this example	Question to investigate	Evidence or limit
Requesting role	What decision did you need, by when, and what information did you supply?	Permitted request reference, timing and known missing fields.
Receiving / approving role	What made this request ready or not ready for a decision?	Applicable boundary, actual response and competing work.
Sponsor	Who can settle a disputed boundary or competing priority?	Current authority and decisions still open.
Internal coordinator	Which records and versions can the group appropriately compare?	Approved location and access limits. No private personnel export.

Compare accounts without forcing agreement

Use one permitted work example where appropriate. Keep observed events, each person's interpretation and missing evidence separate. A single account can identify a question without establishing everyone's experience.

Additional role and the different information it can supply

Who may invite that role and approve use of the evidence

What remains unverified and who can check it

Read alongside: Defining prerequisites and review responsibilities.