

## GETTING THE BRIEF RIGHT - Judith Clark 6d Consulting Limited

### Introduction

I have worked as both a consultant and a client commissioning consultancy work, and, in my opinion, the most important stage in any consultancy or project activity is getting the initial brief for the work right and understood by all involved.

Very often the importance of this stage in consultancy work is ignored, with the perceived pressures of delivery leading to a tendency to jump straight in to start the work without going through this initial process.

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*one of the most important stages in any consultancy or project activity is getting the initial brief for the work right*

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We have all been in situations where this has happened and, having seen and sorted out many instances where this stage has been overlooked, I can only reiterate how important this stage is even if it only takes up a small amount of time as part of the overall piece of work.

I am going to take you through the four steps that I follow in order to get the brief right, highlighting the key skills and outcomes and giving you the benefits for each step.

The four step approach is as follows:-

1. Defining the brief
2. Delivery definition
3. Defining timescale
4. Agreeing the brief

However the work is requested, it is vital for both client and consultant to ensure they put in enough effort at this early stage if they want to meet their objectives for the consultancy work, and the four step approach will achieve this.

For clarity, I have written this article from the consultant's perspective. The approach and comments are equally valid applied to the client's perspective.

### 1. Defining the brief

<b>Key outcome</b> = clear and matched understanding of what the client wants and the context in which it is needed.
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<b>Key skills</b> = listening and questioning.
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This step is all about **understanding**. As the consultant you should listen, explore and question as much as possible, and as the client, you should provide as much information as possible.

The initial client brief can be presented or defined in many ways. However the brief is presented, a review, preferably face to face, with the key client sponsor is vital to understand the context, the driver for the piece of work, the client's objective and expectations, and the overall outcome that the client is expecting to achieve.

This review will allow you to build rapport with the client and provide you with an understanding of how they operate as a manager and an individual. For example, is the client a big picture person or do they feel more comfortable with lots of detail; will they be more concerned about the people involved or about the processes; do they want lots of options developed or a single recommendation? Understanding this will allow you to provide the information in a way that will give the most benefit to the client.

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*this step is all about understanding,  
listening, exploring and questioning*

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Some of the key areas to listen, explore and understand in this step are as follows:-

- What is the overall objective of the consultancy work, both from the client sponsor's perspective and from the organisation's perspective?
- What are the other drivers for this piece of work?
- What will be the benefits from this piece of work and who will benefit from it?
- Who are the stakeholders within the organisation and how is this piece of work viewed within the overall organisational context?
- Who are the other people involved in making this piece of work a success?

- What will this piece of work be used for and what would be the next step to take it forward within the organisation?
- What is the sponsor's expectation of the consultant?

It is also useful to understand and talk to other people who may be relevant to the consultancy piece of work if possible and appropriate (there may be confidentiality issues around the piece of consultancy which means that this is not possible at this stage).

You can also carry out your own analysis of the organisation to understand the context of this piece of work outside of any internal interviews, for example reviewing any recent press articles, checking the website, even if you are already working with the organisation.

It is also important that you understand the reason why you have been asked to do this piece of work as this will aid your understanding of the context within the organisation. It could be because there are not enough resources within the organisation to do it, or because somebody independent is needed, or because you have a specific skill set the organisation doesn't have. Understanding the answer to this question will allow you to match the client's expectations.

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*promising a delivery date when there is no internal buyin leads to timescale overruns*

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An example from my recent experience demonstrates how important this understanding is. The client asked the consultant to write a document (a set of requirements) on the basis that there was no in house resource available to carry out the work. The consultant, however, did not take on board the context in which they had been asked to do the work. The consultant tried to sell additional services to the client which they didn't want, with the end result of bad feeling all round and a non delivery on the original request for the work. The brief had to be re-scoped and the work started again in order to deliver the client's requirements.

## 2. Delivery definition

<b>Key Outcome</b> = agreed delivery mechanism
<b>Key skills</b> = rapport, listening and questioning

This step is about **matching expectations** on how the piece of work will be delivered. As part of defining the brief, it is important to agree what the specific deliverables will be and how they need to be presented, so that the expectations of the client are matched.

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*too many good pieces of work fail because the final deliverables are not presented in the way the client expects*

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Key questions at this stage include:-

- How does the client want to be updated? Are there any interim deliverables, milestones or reports that need to be put in place?
- What final deliverable is the client expecting - a presentation, a report, a summary including the detail?
- What is the format of the document? Remember that one person's report is another person's executive summary and vice-versa, so it is important that the format is understood.
- How will the delivery be presented - as a report or as a formal presentation to key stakeholders with back-up report?
- What will be the measures for successful delivery and how will this be signed off and agreed?

In my experience, too many good pieces of work fail because they are not presented in the way that the client expects because there has been a mismatch of expectations. Spending time on this step will pay dividends down the line.

## 3. Defining timescale

<b>Key Outcome</b> = agreed timescale for delivery
<b>Key skills</b> = rapport, listening and questioning

This step is about **clarity and scope**. Having completed the first two steps, then you already have a clear understanding of what the client wants and how they are expecting it to be delivered. This step now defines when they will get it delivered.

To allow you to agree a timescale for successful delivery, you need to make sure that certain key questions are answered in this step of the process. These include:-

- How will access to the necessary people in the

organisation be arranged?

- Are key stakeholders aware and bought into the work? Failure to obtain buy-in from stakeholders will limit the success of any piece of work.
- How will the piece of work be communicated within the organisation? It is vital that this is done and accepted before the works starts so that there is understanding and buy-in.
- What are the overall timescales for delivery and can these be met within the organisational context?
- How will the consultant and client work together?

Timescale and the impact on the structure of the work tend to be far more important considerations for the consultant, especially if you are dependent on availability of people within the organisation to carry out your work.

This recent example highlights how vital agreeing a delivery timescale is. I was asked to sort out a recent piece of work where the delivery timescales had not been met because the consultant had been given an unrealistic timescale. The time allowed didn't account for the time needed by the consultant to arrange access to the people they needed to interview within the organisation. This was made more difficult as the people within the organisation had not been briefed so had no buy-in. We solved this by completing a full briefing to key stakeholders within the organisation and then restarting the interviews - effective but doubling the time taken to complete the original work.

## 4. Agreeing the brief

**Key outcome** = an agreed brief for consultancy work understood by both sides and with matched expectations

**Key skills** = building on the understanding and rapport from defining the brief, as well as the ability to match the client's requirements.

This final step is all about **translation** of the answers and outcomes from the previous steps in such a way as to be able to reach an agreed understanding of the brief for the work required.

As the consultant, you are going to be asked for a proposal to respond to the client's brief, however

defined. This response could be a very short document agreeing to the brief or a huge tender. Whatever the

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*this step is all about translation of the responses from the first stage into an agreed brief*

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the size, the ability to respond and answer the client's questions in a matching style is crucial. This proposal will be the basis for your ongoing agreement with the client and will cover everything learnt in the first three steps.

To make sure that your understanding of the overall brief is fed back and agreed with the client, here are some key elements to cover in this step of the process.

- Ask the client "This is my understanding of the brief, does this match with yours?"
- Go back through all the supporting circumstances and elements of the project such as the drivers to ensure you have a common understanding.
- Confirm the deliverables, milestones, reports, who will do the work, who you need to work with and the overall timescales for delivery.
- Confirm the communication plan and how key stakeholders will be updated.
- Cover any outstanding questions about the overall brief?
- Use these elements to be sure that the overall brief is understood and agreed.

The agreement of the brief is best done in a face-to-face meeting. When the brief is agreed with both sides understanding and matching their expectations, then there is a much higher prospect of successful delivery

The cost is obviously important to you at this stage, and now you understand what is entailed in the work, you can realistically cost the work. As a consultant you should not underestimate the value of what you do, and if necessary you need to demonstrate the value you provide by the input of the previous stages.

In my experience, if there is good rapport between the client and the consultant, then generally agreeing the cost of any consultancy work is fairly straightforward, especially if the relationship has been built up through the above stages. Even in tender and bid situations, consultancy is about people, so most good clients buy using price as only one part of their assessment.

## In Summary

**Successful outcome** = agreed brief which has sign-off by both sides with much higher prospect of successful delivery, agreed timescales and associated costs

**Key skills** = listening, listening, listening, questioning and matching what the client needs, understanding what the client needs as opposed what the client wants, if they are not matched, and being able to briefly refer them to other examples.

The importance of these steps is vital to provide both sides with a framework within which to operate.

The timescale for going through these steps will depend entirely on the type of consultancy work as it could be done within one meeting, or it could be done over a period of time - the steps remain the same.

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*In summary, the more effort and input at this start to define and agree the brief, the more successful the delivery*

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Key reasons for using these steps are:-

- To draw boundaries around the scope of the work which are then used as the basis for defining the deliverables, expectations, cost and timescales.
- If major changes in scope are put forward by the client, then there is an agreed basis from which to review the piece of work.
- The right amount of effort and input at this stage pays huge dividends both in the production of the work and in the relationship between consultant and client which is developed at the earliest stage.

As with most things, these steps are very simple and if followed, then doing the work becomes much more straightforward. It will still be challenging but both client and consultant will be operating within a clear framework where both have matched expectations of the scope, the deliverables and the value of the consultancy piece of work.

In summary, the more effort and input you can have at this stage of a project to get the brief right, the more successful the consultancy delivery is going to be for

both consultant and client. From the client's perspective, a consultant who truly listens to what the client wants and delivers is a consultant the client will build a relationship with and continue to work with.

## Judith Clark - 6d Consulting Limited

### About 6d Consulting

6d is passionate about helping you make things happen within both your organisation and your business life by helping managers project manage in practice.

We offer business programme and business project management and coaching to help you achieve your goals, the first element of this being getting your initial brief right.

We take your vision to action. We work with you and your teams, in partnership, to maximise the business potential and performance of your people and, through them, your business.

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