

# HOW TO...

## NAIL DOWN A PROPER BRIEF

Whether you're an independent consultant, external supplier or internal L&D Business Partner, getting a clear brief that is agreed and stuck to can feel like trying to find the Holy Grail. But getting clarity and managing expectations is so very important. Once we have a clear brief, we can get to work designing the right solution to fit the needs of the stakeholders. But sadly, all too often, those needs are never properly defined OR (more likely) change on a regular basis.

This means that you can waste a lot of time in the design phase, with perfectly good training being revised, reworked or completely rejected. This is frustrating for everyone and of course adds to the length of time it takes to deliver and the cost of delivery too.

There's no process that will guarantee this won't happen, but here are some ideas that should help to restrict the amount of changes and the impact they have.

1. **Identify the Decision Maker** - It may sound obvious, but it's not always easy! It's likely that the project will have many interested parties (and that's good) but too many people getting involved can really muddy the waters. Get clarification on who are the INFLUENCERS and who will make the final DECISION. Use the RAPID Model to identify who plays which role.
2. **Agree a Process** - Describe what stages you will go through, who should be involved in each, and where the sign-off points are. Allocate timescales to this too. A project plan helps to keep everyone focused.
3. **Listen to Stakeholders** – Make sure as many people who want to have a say in the solution get their opportunity to be heard AT THE START. When people see their own ideas reflected back later in the process, they are more likely to be happy with the outcome.
4. **Do your Own Research** – Take time to observe things first hand and speak to others that you feel will add value to the solution. Gather EVIDENCE and EXAMPLES that you can present back.
5. **Clarify Outcomes, Deliverables, Timescales and Budget** – Make sure that your recommendation specifies exactly what is in (and out of) scope, the effort (timescales) required for each part and (if you are external) the associated fees for each part.
6. **Present your Plan** – Summarise your findings, make your recommendations and present your plan to the designated decision maker. Create a detailed outline, project plan or proposal which should be the first major sign off point. Make clear links between your proposed solution and the stated outcomes required. Use this document to guide phase 2 of the design... the detailed development.



7. **One Point of Contact** – From here on in, aim to liaise with just one point of contact. If the decision maker wishes to consult with others before signing off, that's OK, but you take your feedback from them and them alone. The only exception is if you need to consult with subject matter experts during detailed design to make sure that your content is correct.
8. **Give regular updates** – Keep your decision-maker in the loop by providing short, clear updates. Regular contact means that any changes are likely to be flagged early, limiting re-work.
9. **Refer back to your detailed scoping document** – If you notice scope creep, refer back to the detailed scoping document and ask which parts need to be amended. Explain how this will affect the timescales and costs (if it will). Gain agreement to changes in writing.
10. **Negotiate** – Sometimes the brief DOES need to change and we shouldn't be so rigid to stick to a brief that will no longer deliver relevant benefits. However, your work on the project to the current point shouldn't be dismissed either. If you need to include more, something different, or liaise with hard to pin down people, you should always aim to say yes.... But your stakeholder needs to accept that a change in one place needs to be balanced by a change in another. Maybe if a new focus or extra content is to be added to a programme, but the launch date cannot move, perhaps you can just have module one ready to go in time for the original start date rather than the whole programme? If budget needs to be cut, can the delegate materials be reduced? There's always a solution – it just needs to be negotiated.

