



transform

## Guidelines for working with Transform

These guidelines are intended:

- ❖ To set the tone for our business relationship
- ❖ To create appropriate professional boundaries and to allow a clear set of mutual expectations
- ❖ To act as the basis for discussion
  - At the outset of the project – to clarify how we will work together
  - As the project progresses – to review progress
  - At the end to evaluate how the assignment went

## What you should expect from the consultant

- ❖ To clarify the objectives of the work and to agree with you exactly what will be delivered
- ❖ To agree with you and put in writing, a timetabled plan of activities and a price for those activities
- ❖ To be in regular contact with you as the project progresses
- ❖ To bring to your attention any other issues which may have a bearing on our ability to meet the original objectives
- ❖ To make you aware as soon as possible if the objectives, work plan or timetable needs to be reviewed
- ❖ To be open to feedback from you throughout the project

## What the consultant(s) will expect from you

- ❖ To give a clear brief of the work you would like to be done, together with a clear sense of the outcomes expected
- ❖ To be clear about who is taking overall responsibility for the consultancy within your organisation
- ❖ To communicate the purpose of the consultancy to all involved so that people within your organisation understand what is happening,

how it impacts on them and what may be required of them (time for interviews, etc)

- ❖ To use the consultant's time efficiently, for example by organising interviews consecutively, arranging meetings, ensuring meetings start and end on time and circulating papers in advance where appropriate
- ❖ To raise any concerns you may have with us as soon as they arise so that they can be addressed together
- ❖ To provide feedback at the end of the project about how the project went and any learning for future assignments of this nature

## What we should expect from each other

- ❖ To demonstrate a reasonable degree of flexibility to achieve our shared objectives
- ❖ To identify potential barriers or risks to a successful outcome as the project progresses
- ❖ To ensure open and honest communication throughout the project
- ❖ To participate together in a debriefing at the end of the project in order to identify any learning for you and for the Consultants arising from the project