

Consulting engagement brief

A fictional example of defining a practical people project

This sample explores a clearer onboarding experience for a growing service team. It shows how the business need, scope and decisions could be recorded before an engagement is agreed.

The situation to understand

In this fictional scenario, new starters receive different instructions from different managers. The brief is to understand those handovers and develop a shared outline that the team can review.

Proposed focus

Work area	Illustrative output
Discovery	A summary of the current handovers and the questions still open.
Responsibilities	A draft map of who supplies information and who checks it.
Review	An onboarding outline for discussion with the business owner.

Decisions before work begins

Confirm the people involved, the material that may be reviewed and the person who can approve the scope. Agree the fee, timing and review allowance separately. Any employee information would require an appropriate handling arrangement.

Sample decision

Begin with one illustrative team journey and refine the scope after discovery.

All circumstances and proposed outputs are invented for this design example. This page is not an accepted engagement or a statement of results.