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The Versa approach to consulting and quality assurance

March 2008

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Introduction

This document provides an overview of our approach to consulting along with details of the framework we use for assuring the quality of the consulting work we provide.

The framework is designed to clarify and explain the various different aspects of the approach that we take and how they are applied in practice. It explains the:

- Way quality assurance is integrated with our overall approach
- Application of our quality standards to our consulting assignments
- Processes we use to assure the quality of service design and delivery
- Role of consultants in coordinating consulting and quality assurance activities

The document is intended for internal use e.g. for explaining QA arrangements to associate consultants; as well as for external use e.g. for illustrating our overall approach to clients.

Overview

The Versa approach to quality assurance is made up of three distinctive elements that make up an integrated quality model for delivering effective consulting services to clients. These elements are as follows:

- A set of quality standards
- A defined quality assurance process
- The role of the quality consultant
- The role of the MD in driving continuous improvement

Each of these elements is described in more detail in the text that follows. However, to understand fully the nature of the Versa approach to quality assurance and how it works in practice, it is important to understand the operating context in which quality assurance activity takes place.

This context consists of four main dimensions:

- The Versa approach to consulting
- The way we use evidence
- The design of the consulting team
- The way we work with clients

The importance of these four main dimensions is explained in more detail below.

The Versa approach to consulting

The Versa approach to consulting is designed to achieve four specific objectives on each and every assignment. They are to:

- Correctly diagnose the client's problem and develop a 'fit for purpose' solution
- Successfully deliver the solution to the required standard, on time and within cost.
- Maintain a working relationship with the client based on dialogue and mutual trust
- Increase our clients and our own expertise so that we continue to improve

To achieve these objectives Versa use a 'tried and tested' three stage consulting process as the basic framework for delivering all of our consulting assignments.

This three stage process is as follows:

1. **Engage** - understand the needs of the client and develop suitable proposals
2. **Deliver** - manage the delivery of the assignment on time and within cost
3. **Learn** - review what worked and identify any lessons to be learned

Using this process as our starting point, we tailor our approach to each consulting assignment to ensure it is flexible and responsive to the unique needs and priorities of each client, whilst ensuring our own ongoing development as a knowledge based organisation.

The way we use evidence

Underpinning the consulting process used by Versa is a commitment to maximising the use of evidence in the preparation of consulting advice to clients. Our advice is always based on rigorous, fact based analysis. The data on which we base our advice can take many forms - from detailed financial information to qualitative market data gathered from interviews with clients or their customers.

Our approach is based on the assumption that organisational performance is most likely to improve when managers act on better logic and firmer evidence. It follows therefore that the provision of consulting advice needs to be based on both a clear logic and robust evidence. To ensure that you can rely on and trust our advice:

- We base our consulting on up to date knowledge of 'what works', 'how it works' and 'where it works'
- Ensure our advice will have a clear and understandable logic and will take account of the specific context in which it is to be applied
- Use evidence that is carefully selected, appropriate to the context and from an identifiable source

- Make sure that confidentiality issues are handled in a way that enables people to express their views to us in an open and constructive way.
- Use evidence that is accessible, accurate, actionable and applicable to the problem at hand
- Any suggestions that we make will be written in plain English and will identify both the advantages and disadvantages of any proposed actions
- Any solutions we might propose will take account of the specific needs of your organisation and the challenges it faces

The design of the consulting team

Versa consultants generally work in small teams set up specifically to meet the requirements and aspirations of the client involved.

We design our consulting teams to be flexible and responsive to the specific needs identified by the client. Each team is constructed to reflect the range of knowledge and skills that are required for the successful completion of each assignment. This will include the knowledge and skills to:

- Diagnose the problem confronting the client and to develop a suitable solution
- Manage the implementation of the solution to standard, on time and within cost
- Maintain a productive relationship with the client based on dialogue and trust
- Self evaluate performance and identify strengths and areas for development

It is important to note that this approach reflects an emphasis on starting from a ‘*process*’ based approach to consulting that recognises the need to work alongside clients to help them identify and resolve problems, rather than from a ‘*content*’ based starting point where the knowledge resides with an ‘expert’ consultant and where a ‘disempowered’ client is less able to make informed choices about what is required.

Descriptors for each consulting team roles have been set out in *appendix two* and are based on the following team structure:

- Each team will have a designated ‘**lead consultant**’ who is responsible for leading and managing the consulting assignment as a whole and who will ensure that the required outcomes and benefits are delivered on time and within cost.
- Dependent of the requirements of the assignment one or more ‘**team consultants**’ will be required to contribute to the delivery of the assignment, as appropriate to the needs of the client and in accordance with the specialist skills, knowledge and experience that they bring.

- Each assignment needs a **‘quality consultant’** who can act as a ‘critical friend’ to the consulting team to review and challenge, in a constructive and supportive way, the main assumptions on which the project is being delivered and help maintain a sharp focus on delivering the required outcomes and benefits.

The way we work with clients

At Versa we work closely and collaboratively with our clients helping them to resolve challenges quickly and effectively. Our experience has taught us that effective partnership working with our clients is a key factor in the success of our consulting projects. As a result we aim to build relationships with clients that are based on:

- Mutual trust
- Joint collaboration
- Dialogue and discussion
- Shared risks and rewards

To achieve effective partnership working with clients we aim to manage our relationships with them in a structured and pragmatic way. In particular we will:

- discuss with the client at the outset how we propose to work together including our approach to quality assurance
- conduct our relationships with clients in an open and transparent way whilst respecting client and commercial confidentiality
- Work closely with our clients to develop explicit goals for the work that we do together
- Develop an agreed delivery plan with the client that can be used as a joint vehicle for monitoring progress
- Clarify the way in which resources (both ours and the clients) are to be deployed during the assignment
- Record any significant changes to the delivery plan and the expected implications of these changes
- Ensure that any potential risks and rewards resulting from our work are distributed in an appropriate way
- Develop a strategy for ensuring knowledge transfer both from consultant to client and from client to consultant
- Arrange for the lead consultant to act as the initial point of contact for all aspects of the consulting assignment
- Maintain an ongoing dialog with the client about the progress of the consulting assignment and to ensure there are ‘no surprises’

- Ensure the lead consultant provides regular written reports, via email, telephone or face to face as appropriate, advising the client of progress.
- Ensure that all our consultants are easily accessible to clients by mobile telephone and email returning all calls and emails within 48 hours.
- Keep in contact with our clients on an ongoing basis to share knowledge and information

Versa quality standards

We are confident in our tried and tested approach to quality assurance and we are pleased to be able to guarantee the standard of our work. The starting point for our approach to quality assurance is the comprehensive range of quality standards that we apply to our work. To ensure our work is of the highest possible standard we will:

- discuss your requirements in detail and identify exactly what your needs and priorities are
- assess whether we are a suitable organisation to provide the services that you require
- develop cost effective proposals showing how we will meet your requirements on time and within cost
- set out a methodology that is fit for purpose, relevant to the context and cost effective
- produce clear work plans that identify activities, dependencies, individual responsibilities and time-scales
- identify resource requirements in terms of the inputs needed from both our staff and your staff
- clarify and record in detail the agreed terms of reference and deliverables for the assignment
- use dedicated staffing to deliver the project on time, within cost and up to the required specification
- assign people that are suitably qualified for the type of work and environment involved
- review the progress of the project with you on a regular basis and in an open and constructive way
- identify and record any significant changes to the delivery plan and clarify the implications
- provide easy access to our consultants and ensure effective communication between the people involved
- evaluate our work with you including seeking formal feedback about our performance at the end of the assignment

- conduct an annual review of our overall quality assurance process to ensure that it is working effectively and that we continue to improve

If a client is dissatisfied in any way Versa will take all reasonable steps to rectify the problem quickly and to their satisfaction.

Details of the exact types of records that need to be maintained by consultants leading assignments are set out in *appendix one*.

Versa quality processes

To ensure the delivery of the quality standards set out above Versa has developed a simple quality assurance process to be applied to each assignment.

The aim of the quality assurance process is twofold. Firstly the process must ensure that consulting projects are delivered on time, within cost, to the requisite quality standard and that clients are pleased with the outcomes. Secondly the QA process must ensure that the individuals involved are able to learn from the experience of delivering the project.

The Versa quality assurance process is coordinated by the designated *quality consultant* in each consulting team and has four main process steps:

1. A '*initial*' review - designed to ensure that each project is 'set up' in the most appropriate way and that all the required tasks have been identified and allocated to people in the consulting team appropriately. The emphasis at this stage is on 'getting it right first time' and on ensuring that any lessons we have learned previously from similar projects are applied in an appropriate way. This review will be conducted early on in the delivery process to ensure that all aspects of the project have been set up in an appropriate manner and that the project is on course to deliver the required outcomes.
2. One or more '*interim*' reviews as required - designed specifically to ensure that larger projects in particular remain on track (or put back on track if required) to deliver the required outcomes and benefits for our clients. All projects will have both an initial and a completion quality assurance review although some larger projects, particularly projects delivered over an extended timescale, may require one or more additional '*interim*' QA reviews to monitor progress on an ongoing basis. The need for this will be agreed with the client as appropriate to the project in question.
3. A '*completion*' review - designed to ensure that the assignment has been conducted to the satisfaction of the client and that the required benefits have

been delivered to the desired standard, on time and within cost. This review will be conducted towards the end of the project and will focus on ensuring that the project outcomes and benefits will be delivered as required.

4. A '*post project*' review - designed to identify and capture any lessons that need to be learned for future use. This review is a key element in ensuring the ongoing improvement of consulting services provided by Versa.

All reviews will be coordinated by the consultant assigned to the QA task during the project design phase. The timing of QA reviews should be negotiated and agreed with both the client and the consultant responsible for leading the delivery of the project.

The role of the quality consultant

A '*quality consultant*' will be appointed to take specific responsibility for coordinating our quality assurance process for every assignment. The purpose of the quality consultant is to act as a 'critical friend' to the lead consultant (and where appropriate the client) and to provide a 'second pair of eyes' as and when required and most importantly to help ensure a sharp focus on the delivery of the assignments required outcomes and benefits.

Whilst it is important for the quality consultant to be familiar with the details of the consulting assignment and the context in which it is being delivered it is also important that they should be able to act in an impartial and objective manner.

The quality consultant is responsible for negotiating the timing of each quality review with the lead consultant and for noting any outcomes or agreed actions. A key roles of the quality consultant is also to identify and capture any significant 'lessons to be learned' and to ensure that they are disseminated appropriately.

The quality consultant is also responsible for dealing with any complaints or disputes that cannot be dealt with directly by the lead consultant or where the complaint is about the lead consultant.

Driving continuous improvement - the role of our MD

Our ability as an organisation to self-evaluate our own performance and to improve service design and delivery as a result of what we learn is central to securing our ongoing capability to provide high quality professional services. In addition to the ongoing work of our quality consultants, our Managing Director visits each of our clients after each assignment is completed to review performance overall and to assess client satisfaction.

Conducting quality assurance reviews

The checklist below is designed to act as a working agenda of questions to be considered during each stage of the quality assurance process:

1. *Record keeping* - has the lead consultant developed and maintained a suitable record of the assignment?
2. *Project management* - is the project going to deliver the required outcomes and benefits on time, within cost and to the appropriate standard?
3. *Relationship with the client* - is the relationship with the client being managed in a productive and constructive way?
4. *Problem analysis and solution development* - is the diagnosis based on sound evidence and is the solution appropriate to the needs of the client?

The quality consultant will make a note of the agreed actions resulting from the review which will be retained along with the other records.

Appendix one - Records management

Maintaining accurate and up to date records of the assignments we are charged with delivering is a critical element in delivering the Versa quality standards and for maintaining open and transparent relationships with our clients. For each assignment the lead consultant is responsible for maintaining a detailed electronic record, including the use of a document control system where appropriate, that includes:

- The invitation to tender or equivalent
- Our evaluation of risks and rewards
- Our formal proposal to the client
- The client acceptance letter or contract
- A project delivery plan (work breakdown, milestones, resources, etc)
- Significant changes to the plan and expected impact
- Records of specific deliverables
- Progress reports
- Contract changes
- Outcomes from quality reviews
- Client feedback

Versa will ensure that these (and any other records that the client requires) records will be kept in a suitable format and to a suitable standard to be made available to the client on request. Versa will also maintain appropriate post project archive records which can be made available to clients on request.

Appendix two - role descriptors for consultants

Lead consultants are responsible for:

- Leading and coordinating the delivery of the assignment as a whole and ensuring the delivery of the required benefits to the client
- Ensuring the assignment is both planned and delivered on time, within cost and to the required standard
- Liaising with the client about all matters concerning the assignment including dealing with queries and complaints
- Providing detailed progress reports to the client as and when agreed and appropriate including setting up a post project archive as appropriate
- Managing and monitoring the overall budget for the assignment and ensuring the assignment is delivered within cost
- Working with the quality consultant to deliver a robust quality assurance process
- Working with and coordinating the contribution of team consultants in particular the coordination of team meetings

Team consultants are responsible for:

- Contributing their specialist expertise to the delivery of the assignment and the delivery of the required benefits
- Working with the Lead consultant to ensure their effective contribution to the delivery of the assignment including contributing to team meetings
- Liaising with the client as appropriate including dealing with specific queries that relate to their particular contribution to the assignment
- Providing detailed progress reports or documentation in relation to their particular contribution to the project as and when agreed

Quality consultants are responsible for:

- Coordinating the delivery of formative and summative quality assurance reviews in conjunction with the lead consultant and team consultants as appropriate
- Recording the outcomes of these reviews and ensuring that the lead consultant is provided with a note of the agreed outcomes
- Dealing with any complaints or moderating any disputes that cannot be dealt with by the lead consultant
- Acting as a 'critical friend' and providing a 'second pair of eyes' as required by the lead consultant
- Helping to ensure a sharp focus on the delivery of the required outcomes and benefits for the client including checking documentation has been archived