

The CONSULT method

- C

Choose the work: Choose before you chase.
Find the real decision behind the ToR · Score fit, readiness, budget and conflicts · Ask clarifying questions before you bid
- O

Offer: Lead with the answer you expect, then show how you will test it.
Restate the problem in one sentence · Offer a first hypothesis · Break questions into a tree
- N

Negotiate the contract: Contract the expectations, not just the price.
Deliverables with page limits and review rounds · Payments on milestones, not approval · A written change process
- S

Set up the inception: Design for use from day one.
Meet the people who will use the findings · An evaluation matrix for every question · Sketch the report before collecting data
- U

Uncover the evidence: Collect only what answers a question, and check it every day.
Pilot every tool · Daily quality checks · Triangulate across sources
- L

Land the findings: Answer first, then the evidence, then the detail.
Answer first, then evidence · A one-page summary on top · Validate with stakeholders
- T

Transfer and track use: The assignment ends when the findings are used, not when the invoice is paid.
A management response with owners and dates · Hand over data and tools · Ask for feedback and a reference
- Trust** = (credibility + reliability + intimacy) ÷ self-orientation.
Maister, Green and Galford

Read a ToR: ask first

- Who will use the findings, for which decision?
- Which questions matter most, and can they be answered in the time?
- Is it monitoring, review, evaluation or impact?
- What data already exists: baseline, monitoring, reports?
- Is the budget stated, and does it match the work?
- What are the deliverables, page limits and review rounds?
- How is payment scheduled?
- Who owns the data and the report?

Contract the expectations

- Scope

The agreed questions and what is excluded.
- Deliverables

Each one with format, length and review rounds.
- Payments

Milestones tied to submission, with an advance.
- Change process

Extra work is agreed in writing with days and fees.
- Independence

The client checks facts; the evaluator decides findings.
- Data

Who owns, stores and deletes data, and how it is protected.
- AI use

What tools may be used, on which data, and how it is disclosed.

Write answer first: 1:3:25

- 1 page

Key messages: the answer to each question, and what to do.
- 3 pages

An executive summary by question, with the main evidence.
- 25 pages

Findings by question, methods, limits and recommendations. Annexes hold the rest.

Eight habits of top firms

Answer first · Hypothesis-driven · No overlaps, no gaps · 80/20 · So what? · Pre-wire · Obligation to dissent · Results, not reports.

21 top-firm tools, by stage

- C

Bid or no-bid gate, Problem statement worksheet, Stakeholder power and interest map
- O

Issue tree and day-one hypothesis, Three-option proposal, Colour team reviews
- N

Statement of work and change control, RAPID decision roles, Engagement charter
- S

Kick-off and workplan, RAID log, Ghost deck and report
- U

80/20 analysis plan, Weekly status note, Evidence strength rating
- L

Storyline and action titles, Pre-wiring and validation, Impact and ease prioritisation
- T

Management response tracker, After-action review, Client feedback score

With AI: six promises

1. **Client data stays where agreed.** Only approved tools, only de-identified data, as the contract says.
2. **Every source is checked.** No reference, quote or number goes in unopened.
3. **AI use is disclosed.** The method note says what AI did and who checked it.
4. **Humans own the findings.** AI drafts and suggests; the evaluator decides and signs.
5. **AI terms are in the contract.** Permitted uses, data rules and disclosure, agreed up front.
6. **Saved time goes to the client.** More listening, sharper synthesis, or a lower price.

Get paid

An advance on signing · Payments on submission, not approval · Invoice the day a milestone is met · Check registration, GST and tax deduction rules with an adviser.