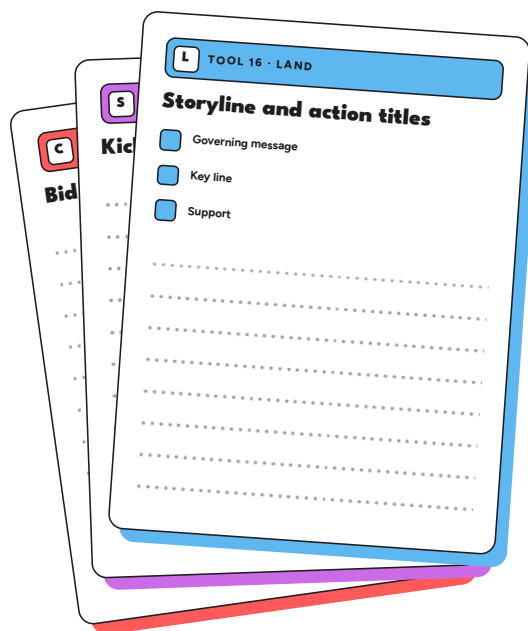


TEMPLATE PACK

The template pack

CONSULTING IN MONITORING & EVALUATION WITH AI PLAYBOOK

36 printable templates, each a two-page spread. On the left, a concept guide: what it is, why it matters, when to use or skip it, key principles, a worked example and a quality check. On the right, the template, with guidance, steps, common mistakes and an AI prompt. Part 1: 21 tools in the seven CONSULT stages. Part 2: nine documents every consultant writes. Part 3: six tools to build your brand and network.



Part 1 • Tools 21 TOOLS · CONCEPT GUIDE + TEMPLATE · SEVEN STAGES

C 1. Bid or no-bid gate pp. 4-5	C 2. Problem statement worksheet pp. 6-7	C 3. Stakeholder power and interest map pp. 8-9
O 4. Issue tree and day-one hypothesis pp. 10-11	O 5. Three-option proposal pp. 12-13	O 6. Colour team reviews pp. 14-15
N 7. Statement of work and change control pp. 16-17	N 8. RAPID decision roles pp. 18-19	N 9. Engagement charter pp. 20-21
S 10. Kick-off and workplan pp. 22-23	S 11. RAID log pp. 24-25	S 12. Ghost deck and report pp. 26-27
U 13. 80/20 analysis plan pp. 28-29	U 14. Weekly status note pp. 30-31	U 15. Evidence strength rating pp. 32-33
L 16. Storyline and action titles pp. 34-35	L 17. Pre-wiring and validation pp. 36-37	L 18. Impact and ease prioritisation pp. 38-39
T 19. Management response tracker pp. 40-41	T 20. After-action review pp. 42-43	T 21. Client feedback score pp. 44-45

Part 2 • Documents NINE DOCUMENTS · CONCEPT GUIDE + TEMPLATE

D 22. Technical proposal pp. 48-49	D 23. Inception report pp. 50-51	D 24. Evaluation report pp. 52-53
D 25. Invoice pp. 54-55	D 26. Informed consent script pp. 56-57	D 27. Key informant interview guide pp. 58-59
D 28. Focus group discussion guide pp. 60-61	D 29. Data management plan pp. 62-63	D 30. Key-expert CV (donor format) pp. 64-65

Part 3 • Brand and network SIX TOOLS · CONCEPT GUIDE + TEMPLATE

B 31. Positioning statement and brand canvas pp. 68-69	B 32. Professional profile builder pp. 70-71	B 33. Portfolio case study pp. 72-73
B 34. Visibility and content plan pp. 74-75	B 35. Relationship map and networking tracker pp. 76-77	B 36. Event and conference plan pp. 78-79



PART 1 21 TOOLS

Tools, stage by stage.

Three proven tools for each of the seven CONSULT stages, from top-firm and evaluation practice. Each tool opens with a concept guide that explains the idea in plain language, followed by the template itself with guidance, steps, common mistakes and an AI prompt.

C Choose	Bid or no-bid gate pp. 4-5 Shipley capture management	Problem statement worksheet pp. 6-7 McKinsey	Stakeholder power and interest map pp. 8-9 Mendelow, 1991
O Offer	Issue tree and day-one hypothesis pp. 10-11 McKinsey and BCG	Three-option proposal pp. 12-13 Alan Weiss, Value-Based Fees	Colour team reviews pp. 14-15 Shipley Associates
N Negotiate	Statement of work and change control pp. 16-17 Project management practice	RAPID decision roles pp. 18-19 Bain & Company	Engagement charter pp. 20-21 Project management practice
S Set up	Kick-off and workplan pp. 22-23 Project management practice	RAID log pp. 24-25 Project management practice	Ghost deck and report pp. 26-27 McKinsey
U Uncover	80/20 analysis plan pp. 28-29 Pareto principle; all firms	Weekly status note pp. 30-31 Consulting practice	Evidence strength rating pp. 32-33 Evaluative rubrics (Davidson); consulting Harvey balls
L Land	Storyline and action titles pp. 34-35 Barbara Minto; McKinsey	Pre-wiring and validation pp. 36-37 McKinsey	Impact and ease prioritisation pp. 38-39 Consulting practice
T Transfer	Management response tracker pp. 40-41 UNEG; evaluation practice	After-action review pp. 42-43 US Army	Client feedback score pp. 44-45 Bain (Net Promoter, Reichheld 2003)

START HERE BEFORE YOU BEGIN

How to use this pack

Every tool and document opens as a two-page spread. Learn the idea on the left, then use it on the right. Work through them in stage order, or go straight to the one you need today.

LEFT PAGE · EVEN NUMBER	RIGHT PAGE · ODD NUMBER
Concept guide What it is Why it matters, use it when, skip it when Key principles and origin In the playbook's example You have done it well if	Template Use it, time, what you need Your template to fill in How to use it and watch out for Check your draft with AI

The four-step loop

- 1 Understand**
Read the concept guide on the left page: what the framework is, why it matters and when to skip it.
- 2 Study the example**
See how it worked in one of the playbook's two running examples, the MEL set-up or the mid-term evaluation.
- 3 Fill in**
Turn to the template on the right page and draft each part on the dotted lines, following the guidance.
- 4 Check with AI**
Remove names, then paste your draft into the AI prompt at the foot of the template and act on the gaps it finds.

Print it double-sided

- Print on A4 at 100% scale (actual size), not "fit to page".
- Choose double-sided, flip on the long edge, with background graphics on.
- The cover prints alone; from page 2 every concept guide falls on a left page facing its template.
- To print one tool, print its two pages together, for example pages 4 and 5.
- Pages 47 and 67 keep the spreads in step, so Parts 2 and 3 open the same way.

The seven CONSULT stages, three tools each

C Choose the work Decide whether to bid, define the real question and map who matters. pp. 4-9	O Offer Structure the questions, price in options and review the bid. pp. 10-15
N Negotiate the contract Fix scope, change control, decision roles and ways of working. pp. 16-21	S Set up the inception Plan the work, track risks and sketch the report early. pp. 22-27
U Uncover the evidence Prioritise analysis, report weekly and rate the evidence. pp. 28-33	L Land the findings Build the storyline, prepare people and prioritise recommendations. pp. 34-39
T Transfer and track use Track the response, learn as a team and ask for feedback. pp. 40-45	D Documents Nine documents every consultant writes, in Part 2. pp. 48-65
B Brand and network Six tools to become a visible, trusted expert, in Part 3. pp. 68-79	

CONCEPT GUIDE
Template on p. 5

A bid or no-bid gate is a short, honest check you run before you spend days writing a proposal. You score the opportunity against a few fixed criteria, such as fit with your skills, whether the budget matches the work and whether the payment terms are fair. The total tells you to go, go with conditions, or walk away. It turns a gut feeling into a decision you can explain to a partner or to yourself. Used every time, it protects your most limited resource: your own time.

- Writing a strong proposal can take three to ten days of unpaid work, so a poor bid has a real cost.
- A low score on one criterion, such as budget or payment terms, often becomes a clarifying question that improves the whole bid.
- Saying no to weak opportunities leaves time for the ones you are most likely to win and deliver well.

- 1 Score before you read the ToR twice; first impressions are data.
- 2 Use the same criteria every time, so scores are comparable.
- 3 Any criterion scored 1 is a condition to resolve, not a footnote.
- 4 Set your go threshold in advance, not after seeing the score.
- 5 Write down why you said no; patterns appear after a few bids.

- ☒ A ToR or request arrives and you must decide whether to respond.
- ☒ You are tempted to bid because the client is famous or you need the work.
- ☒ A partner or firm asks you to join a consortium bid.

- ✖ A trusted client asks you directly for a small piece of work with clear terms.
- ✖ You have already decided to bid for strategic reasons; then use the sheet to list conditions instead.

Bid decision gates come from proposal and capture management, where firms such as Shipley Associates teach a formal go or no-go decision before writing starts. The scoring sheet here is a simplified version for independent consultants and small teams.

MID-TERM EVALUATION

The foundation's mid-term evaluation ToR asked 14 questions in 30 days, with 100% payment on approval and a budget covering about 60% of the work. On the gate it scored 12 of 18: strong on fit and independence, weak on budget and payment. The decision was go, with conditions. The two weak scores became clarifying questions to the foundation about scope and a staged payment schedule.

- ☐ Every criterion has a score and a one-line reason.
- ☐ The decision (go, go with conditions, no-go) is written at the bottom.
- ☐ Each low score has turned into a question, a condition or a reason to decline.

- **Problem statement worksheet** **p. 6**
- **Three-option proposal** **p. 12**
- **Colour team reviews** **p. 14**

Bid or no-bid gate

A short scorecard you fill in before you decide to write a proposal, like checking the weather before a long trek.

USE IT

The day a terms of reference (ToR) arrives, before you write anything.

TAKES ABOUT

20 minutes

YOU NEED

The ToR, your calendar and your day rate

Your template

Assignment: _____ Date: _____

Criterion	Score 1 to 3	Why this score
Keep the same six criteria every time so you can compare bids	1 = poor fit, 2 = workable, 3 = strong	One line of evidence from the ToR
Fit with your skills and sector		
Budget matches the work		
Client knows how findings will be used		
Timeline allows a proper inception		
No conflict of interest		
Payment terms you can live with		
Total: ____ of 18. 15 or more: go. 11 to 14: go with conditions. Below 11, or any conflict of interest: no-go.		

How to use it

- 1 Score fit, client readiness, budget, timeline, conflicts and payment
- 2 Set a threshold before you look at the ToR
- 3 Write down why you said no, for next time

Watch out for

Scoring after you have already decided to bid

Ignoring payment terms because the topic is exciting

Check your draft with AI (remove names first)

Score this ToR against six bid criteria from 1 to 3 and explain each score in one line: [ToR, no names].

CONCEPT GUIDE
Template on p. 7

A problem statement worksheet is one page that pins down the exact question your client needs answered. Clients usually describe a topic, such as 'our M&E system', rather than a question. The worksheet asks you to write one specific, time-bound question, then fill in the context, what success looks like, what is in and out of scope, who decides, the constraints and who already knows something useful. Once the client agrees the page, you have a shared definition of done. Every later choice of method, team and price can be checked against it.

- Many disappointing assignments answered the wrong question very well; this page makes the right question visible.
- A clear scope protects you from requests that grow quietly during the work.
- Success criteria agreed at the start become the test the client uses to judge your work at the end.

- 1 Write a question, not a topic; it should end with a question mark.
- 2 Make it specific and time-bound: who, what, by when, with what resources.
- 3 Always fill in what is out of scope; it saves more arguments than anything else.
- 4 Name the decision the answer will serve.
- 5 Agree the page with the client in writing before you price.

- ✓ After the first call with a client, before you price the work.
- ✓ The request is vague, such as 'help us with M&E' or 'assess impact'.
- ✓ Different people at the client describe the need in different ways.

- ✖ The ToR already states clear, agreed questions and you are only bidding on method.
- ✖ The task is a small, defined deliverable, such as cleaning one dataset.

The worksheet is associated with McKinsey's structured problem-solving approach and is widely taught in consulting training. Similar one-page problem definitions are common across management consulting.

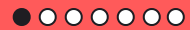
The after-school learning NGO's director wrote: 'Set up our M&E system and train staff.' The worksheet turned this into: 'How can the board see each month whether children's reading improves, within 15 days of consultant time and existing staff?' Scope listed a framework, forms, a dashboard and training as in, and an impact evaluation as out. That one sentence shaped the three-option proposal that followed.

- ☐ The key question is one sentence, specific and time-bound.
- ☐ Scope has both an 'in' and an 'out' list.
- ☐ The client has read the page and agreed it before you sent a price.

- Bid or no-bid gate p. 4
- Issue tree and day-one hypothesis p. 10
- Three-option proposal p. 12

C

CHOOSE TOOL 2 OF 21 · MCKINSEY



Problem statement worksheet

One page that pins down the exact question the client needs answered, before you choose any method.

USE IT

After your first call with the client, before you price the work.

TAKES ABOUT

45 minutes

YOU NEED

Your notes from the discovery call

Your template

Assignment: _____ Date: _____

1 Key question

One specific, time-bound question. What must be answered?

2 Context

What is happening now that makes this matter?

3 Criteria for success

How will the client know it worked?

4 Scope

What is in, and what is out?

5 Decision-makers and stakeholders

Who decides, who uses, who could block?

6 Constraints

Time, money, data, politics.

7 Sources of insight

Who and what already knows something?

How to use it

- 1 Write the key question as one specific, time-bound sentence
- 2 Fill in context, success criteria, scope, decision-makers, constraints and sources
- 3 Agree it with the client before you price the work

Watch out for

- Writing a topic ('our M&E system') instead of a question
- Leaving 'what is out of scope' empty

Check your draft with AI (remove names first)

Turn this request into a problem statement: one specific question, the decision it serves, success criteria, scope and constraints: [request].

Template on p. 9

8

Stakeholder power and interest map

A list of everyone who can shape, use or block the work, sorted by how much power they have and how much they care.

USE IT

At inception, and again before you share findings.

TAKES ABOUT

30 minutes

YOU NEED

An organisation chart and the ToR

Your template

Assignment: _____ Date: _____

[illegible]

How to use it

- 1 List everyone who can shape, use or block the work
- 2 Place each one on power and interest
- 3 Choose an engagement for each quadrant: manage closely, keep satisfied, keep informed, monitor

Watch out for

- Listing organisations instead of named roles
-
- Forgetting the people the programme serves

Check your draft with AI (remove names first)

From this ToR, list likely stakeholders and suggest where each sits on power and interest, with a reason: [ToR].



Issue tree and day-one hypothesis

CONCEPT GUIDE

Template on p. 11

WHAT IT IS

An issue tree breaks one big question into three to five smaller questions, like branches, and then into sub-questions if needed. The branches should not overlap and, together, should cover the whole question. Beside each branch you write a day-one hypothesis: your best early guess at the answer, based on what you already know. The tree organises your thinking, and the hypotheses tell you what evidence you need to confirm or reject each guess. It keeps a long list of ToR questions from turning into a long, unfocused report.

Why it matters in M&E consulting

- ToRs often list 10 to 20 questions; grouping them into a few branches makes the evaluation manageable.
- A hypothesis gives each branch a clear test, which sharpens methods and sampling.
- The branches later become the sections of the evaluation matrix and the report.

Key principles

- 1 Start from one key question at the top.
- 2 Keep to three to five branches at each level.
- 3 Branches should not overlap and should cover the whole question.
- 4 Write each hypothesis as a statement that data could prove wrong.
- 5 Be ready to drop a hypothesis; the point is to test it, not defend it.

Use it when

- ✓ A ToR has many questions that need grouping.
- ✓ You are drafting the approach section of a proposal.
- ✓ The team is collecting data without a clear sense of what it is testing.

Skip it when

- ✗ The assignment is a single, narrow question with an obvious method.
- ✗ The client wants open exploration with no prior view, such as early learning work; hold hypotheses lightly or not at all.

WHERE IT COMES FROM

Issue trees and hypothesis-driven problem solving are widely used in strategy consulting firms such as McKinsey and BCG. The idea of branches that do not overlap and cover everything is often called MECE: mutually exclusive, collectively exhaustive.

IN THE PLAYBOOK'S EXAMPLE

MID-TERM EVALUATION

The foundation's 14 ToR questions became a tree of five branches: relevance, income change, what explains differences, whether groups will last, and efficiency. The day-one hypothesis was 'Income gains follow strong federations.' The design compared districts and federations of different strength so that this guess could be tested. The five branches also became the five agreed evaluation questions.

You have done it well if

- ☐ Every original ToR question sits under one branch.
- ☐ Each branch has a hypothesis that could be shown wrong.
- ☐ Each hypothesis points to the evidence and method needed to test it.

Related tools

- C** Problem statement worksheet **p. 6**
- S** Ghost deck and report **p. 26**
- U** 80/20 analysis plan **p. 28**



Issue tree and day-one hypothesis

A diagram that breaks one big question into three to five smaller questions, like the branches of a tree, each with your best early guess at the answer.

USE IT

While you write the approach section of a proposal.

TAKES ABOUT

1 hour

YOU NEED

Your problem statement

Your template

Assignment: _____ Date: _____

1

Key question (the root)

Copy it from your problem statement.

.....

2

Branch 1

A smaller question. Together, the branches must fully answer the root.

.....

3

Branch 2

Then write your hypothesis: what you expect the answer to be.

.....

4

Branch 3

No overlaps with other branches.

.....

5

Branch 4

No overlaps with other branches.

.....

6

Branch 5

No overlaps with other branches.

.....

How to use it

- 1 Put the key question at the root
- 2 Split into three to five branches, each mutually exclusive
- 3 Write a hypothesis for each branch and the evidence that would disprove it

Watch out for

Branches that overlap, so the same data is collected twice

More than five branches, which usually means some are sub-questions

Check your draft with AI (remove names first)

Draft an issue tree for this key question with no more than five branches, then a testable hypothesis for each: [question].



Three-option proposal

CONCEPT GUIDE
Template on p. 13

WHAT IT IS

A three-option proposal offers the client three versions of the work at three prices instead of one quote. Each option is complete in itself: a smaller essential version, a standard version and a fuller version with extra support. The client's question changes from 'yes or no?' to 'which one?'. You also make clear what each option leaves out, so the client chooses with open eyes. It is a simple way to match scope to budget without cutting your rates.

Why it matters in M&E consulting

- Many M&E requests arrive with no budget; options let the client reveal what they can afford.
- When budgets are tight, you reduce scope, not your day rate or quality.
- Listing what each option excludes prevents later disputes about scope.

Key principles

- 1 Each option must work on its own; the smallest is not a broken version of the largest.
- 2 Price by days and value; show days so the logic is clear.
- 3 State what each option does not include.
- 4 Make the middle option the one you would recommend.
- 5 Keep the descriptions short enough to compare at a glance.

Use it when

- ✓ A client request has no stated budget or timeline.
- ✓ There are clear ways to do more or less, such as adding training or coaching.
- ✓ You suspect the client's budget is lower than the full scope requires.

Skip it when

- ✗ A formal tender asks for one technical and financial proposal in a fixed format.
- ✗ The work cannot be split without making it unsound, such as a sample that would be too small.

WHERE IT COMES FROM

Offering options is widely used in consulting practice and is closely associated with Alan Weiss's writing on value-based fees, which recommends giving clients a choice of options at different levels of value.

IN THE PLAYBOOK'S EXAMPLE

MEL SET-UP

For the after-school learning NGO, the consultant offered three options. Essentials covered a results framework and three forms in 9 days. Standard added a monthly dashboard and staff training in 15 days. Full added three months of coaching after handover in 21 days. The director chose standard, which became the 15-day assignment.

You have done it well if

- ☐ Each option is complete and could be delivered on its own.
- ☐ Days, price and exclusions are shown for every option.
- ☐ The client chose an option rather than asking for a discount.

Related tools

- C** Bid or no-bid gate p. 4
- C** Problem statement worksheet p. 6
- N** Statement of work and change control p. 16



Three-option proposal

Offering the client three versions of the work at three prices, instead of one take-it-or-leave-it quote.

USE IT

When you write the budget section of a proposal.

TAKES ABOUT

1 hour

YOU NEED

Your day rate and the problem statement

Your template

Assignment: _____ Date: _____

Option	What the client gets	Days	Price	What is left out
Name each by its value	The outcome, not the activities	Lead and team days	Including expenses	Be honest; it builds trust

How to use it

- 1 Define the outcome the client values most
- 2 Build three options that rise in value, not just in days
- 3 Price each option, and say what the client gets and gives up

Watch out for

Options that differ only in days, not in value

Making the cheapest option too thin to be useful

Check your draft with AI (remove names first)

Suggest three proposal options for this assignment, each with scope, value to the client and what is left out: [summary].



Colour team reviews

CONCEPT GUIDE

Template on p. 15

WHAT IT IS

Colour team reviews are three planned check-ups of your proposal by people who did not write it. A pink team reviews the outline and approach early. A red team reads the full draft as if they were the evaluation panel and scores it against the criteria. A gold team checks the final version for price, forms and annexes just before you submit. Each review has a date, a reviewer and one guiding question, so it is quick and focused.

Why it matters in M&E consulting

- Writers rarely see their own gaps; a reader acting as the panel finds them fast.
- Errors such as a budget that does not match the workplan can disqualify an otherwise strong bid.
- Planned reviews stop the last-minute rush that produces avoidable mistakes.

Key principles

- 1 Book reviewers and dates when you decide to bid.
- 2 Give each review one clear question.
- 3 Red team reviewers should score against the real criteria, as the panel would.
- 4 Act on the three weakest points first.
- 5 The gold team checks facts and numbers, not ideas.

Use it when

- ✓ Any competitive bid with scoring criteria.
- ✓ A proposal written by several people that must read as one.
- ✓ A high-value or strategic bid you cannot afford to lose on detail.

Skip it when

- ✗ A short, informal quote to an existing client.
- ✗ There is no time for review at all; then do at least a gold check yourself the next morning.

WHERE IT COMES FROM

Colour team reviews come from proposal management practice, especially as taught by Shipley Associates. Many firms adapt the colours and timing to their own process.

IN THE PLAYBOOK'S EXAMPLE

MID-TERM EVALUATION

For the mid-term evaluation bid, a senior colleague ran a pink review seven days before the deadline. Four days before, a colleague spent 45 minutes reading the draft as the foundation's panel. That red team caught that the budget page did not match the workplan. The gold check the day before confirmed that the price, team, forms and annexes were consistent.

You have done it well if

- ☐ All three reviews had a date and a named reviewer before writing began.
- ☐ The red team scored the draft against the actual criteria.
- ☐ Every issue raised was fixed or consciously accepted.

Related tools

- C** Bid or no-bid gate [p. 4](#)
- O** Three-option proposal [p. 12](#)
- L** Storyline and action titles [p. 34](#)



Colour team reviews

Three planned check-ups of your proposal by someone else: pink for the plan, red for the full draft, gold before you send.

USE IT

While you prepare any important proposal.

TAKES ABOUT

Three reviews of 30 to 60 minutes

YOU NEED

A colleague, the ToR and its scoring criteria

Your template

Assignment: _____ Date: _____

Review	When	Who	The question they answer
Pink, red or gold	Days before the deadline	Someone who did not write it	Pink: is the plan right? Red: would we win? Gold: is it complete?

How to use it

- 1 Pink: check the outline, win themes and approach
- 2 Red: score the full draft against the ToR's criteria, as the evaluator would
- 3 Gold: confirm price, team and compliance before you send

Watch out for

Holding the red team the night before the deadline

Reviewers who read as friends instead of as the panel

Check your draft with AI (remove names first)

Act as the evaluation panel. Score this draft proposal against the ToR's criteria and list the three weakest points: [proposal and ToR].

Statement of work and change control

CONCEPT GUIDE
Template on p. 17

WHAT IT IS

A statement of work is the part of a contract that says exactly what you will deliver, to what standard, and how the client will accept it. It lists deliverables with length and review rounds, what is excluded, how long the client has to comment and how payments link to milestones. Change control is the agreed way to handle new requests: a short written change request showing the effect on days, fee and timeline. Together they keep the assignment fair for both sides when things change, as they usually do.

Why it matters in M&E consulting

- Scope creep, small extra requests that add up, is one of the main reasons consultants lose money.
- Clear acceptance terms stop reports going through endless rounds of comments.
- Linking payments to milestones protects your cash flow, especially when the ToR says 'payment on approval'.

Key principles

- 1 Describe each deliverable with length, format and number of review rounds.
- 2 List exclusions as clearly as inclusions.
- 3 Set a comment period and say what happens if it passes.
- 4 Agree a one-page change request process before you need it.
- 5 Spread payments across milestones, not all at the end.

Use it when

- ✓ Before signing any contract, including small ones.
- ✓ The client's ToR is broad or the budget is tight.
- ✓ Several people at the client will comment on deliverables.

Skip it when

- ✗ The client uses a fixed contract you cannot change; then use the template to list the questions to raise.
- ✗ Very short advice calls billed by the hour with no deliverable.

WHERE IT COMES FROM

Statements of work and change control come from project management and contracting practice. They are standard in donor, government and private sector contracts.

IN THE PLAYBOOK'S EXAMPLE

MID-TERM EVALUATION

The mid-term evaluation's statement of work set one review round for the inception report and two for the final report, with 10 working days for comments, and replaced the ToR's 30 days with a 14-week timeline. Payments were split 30%, 40% and 30% across signing, inception and final report. After inception, the foundation asked for two extra districts. A one-page change request added 6 days and a revised fee, and it was signed within a week.

You have done it well if

- ☐ Every deliverable has a length, a format and a number of review rounds.
- ☐ Exclusions and the change request process are written down.
- ☐ Payments are linked to at least two milestones before the final report.

Related tools

- O** Three-option proposal p. 12
- N** Engagement charter p. 20
- S** RAID log p. 24

Statement of work and change control

The part of a contract that says exactly what you will deliver, how it will be accepted, and what happens when the client asks for more.

USE IT

While you negotiate the contract.

TAKES ABOUT

1 hour

YOU NEED

Your proposal and the client's contract template

Your template

Assignment: _____ Date: _____

1 Deliverables

List each one with format, page limit and number of review rounds.

.....

2 Out of scope

Write what you will not do.

.....

3 Acceptance

How a deliverable is accepted, and how long the client has to comment.

.....

4 Change process

How extra work is requested, priced and approved.

.....

5 Payments

Milestones tied to submission, not approval.

.....

How to use it

- 1** List each deliverable with format, length and review rounds
- 2** Say what is out of scope
- 3** Agree how changes are requested, priced and approved

Watch out for

Leaving 'any other tasks as assigned' in the contract

No limit on rounds of review

Check your draft with AI (remove names first)

Draft a one-page change request for this new ask, with days, fee, timeline effect and the approval needed: [ask].

RAPID decision roles

CONCEPT GUIDE

Template on p. 19

WHAT IT IS

RAPID is a way of naming who plays which role in a decision. R is the person who Recommends a course of action. A is anyone who must Agree before it goes ahead. P is who will Perform, or carry it out. I is who gives Input. D is the one person who Decides. Writing these roles down for each decision your evaluation feeds makes it clear who must be involved, and when.

Why it matters in M&E consulting

- Evaluation findings are only useful if someone acts on them; RAPID shows who that is.
- It reveals hidden veto holders, such as finance, before recommendations are presented.
- It shapes who you interview, who joins validation and who receives which product.

Key principles

- 1 List the actual decisions first, then assign roles.
- 2 Only one person holds the D for each decision.
- 3 Keep the A role small; too many people who must agree slows everything.
- 4 Use roles and names, not just departments.
- 5 Confirm the roles with the client, not only your own reading.

Use it when

- ✓ An evaluation feeds specific decisions, such as expanding or redesigning a programme.
- ✓ There is confusion about who will act on the findings.
- ✓ Several organisations share a programme, such as a funder and an implementer.

Skip it when

- ✗ The assignment produces a learning product with no direct decision attached.
- ✗ A single person both commissions and acts on the work.

WHERE IT COMES FROM

RAPID was developed by Bain & Company as a tool for clarifying decision roles in organisations. It is widely used in management consulting.

IN THE PLAYBOOK'S EXAMPLE

MID-TERM EVALUATION

For the mid-term evaluation's management response, the programme director recommended which recommendations to accept. The finance head had to agree, district managers would perform the actions and federation leaders gave input. The foundation's director made the final decision. Knowing this, the evaluator briefed the finance head early on the cost comparison behind the main recommendation.

You have done it well if

- ☐ Each decision has exactly one person in the D role.
- ☐ Everyone with an A role has seen the evidence before the decision meeting.
- ☐ The roles are agreed with the client and match your engagement plan.

Related tools

- C** Stakeholder power and interest map **p. 8**
- L** Pre-wiring and validation **p. 36**
- T** Management response tracker **p. 40**

RAPID decision roles

A table naming who plays which role in each decision the evaluation feeds: who recommends, who must agree, who carries it out, who gives input and who decides.

USE IT

At inception, once you know which decisions the findings will inform.

TAKES ABOUT

30 minutes

YOU NEED

The organisation chart and the list of decisions

Your template

Assignment: _____ Date: _____

[illegible]

How to use it

- 1 List the two or three decisions the evaluation must inform
- 2 Assign one D per decision, and only a few As
- 3 Put the roles in the inception report

Watch out for

- More than one person in the 'Decide' column
-
- Listing everyone under 'Agree', which gives everyone a veto

Check your draft with AI (remove names first)

For these decisions, propose RAPID roles (recommend, agree, perform, input, decide) from this organisation chart: [decisions and roles].

Engagement charter

CONCEPT GUIDE
Template on p. 21

WHAT IT IS

An engagement charter is one page that you and the client both sign at the start of the work. It states the purpose in one line, the deliverables, who does what, the key dates, the main constraints and how you will work together, such as meeting rhythm and comment times. It is less formal than a contract and focuses on how the partnership will run day to day. When questions come up later, the charter is the shared reference both sides return to.

Why it matters in M&E consulting

- It turns the contract into plain language that programme staff, not only managers, can follow.
- Naming who will own the MEL system after handover makes sustainability a goal from day one.
- Agreed working norms, such as comment times, prevent friction later.

Key principles

- 1 Keep it to one page.
- 2 Write the purpose as the outcome for the client, not your activity.
- 3 Name people, not just roles, especially future owners.
- 4 Include how you will communicate and how fast each side responds.
- 5 Both sides sign it.

Use it when

- ✓ At the start of any assignment, once the contract is signed.
- ✓ The client team includes people who did not see the proposal.
- ✓ The work involves building capacity or handing over a system.

Skip it when

- ✗ A very short task of a day or two.
- ✗ The inception report already covers roles and ways of working in detail and the client prefers one document.

WHERE IT COMES FROM

The charter is adapted from the project charter used in project management practice. Consultants commonly use a shorter version for engagements.

IN THE PLAYBOOK'S EXAMPLE

MEL SET-UP

The after-school learning NGO's charter fitted on one page. Its purpose read: 'The board can see each month whether children's reading improves.' It listed the framework, three forms, a monthly dashboard and two trained staff as deliverables. It named the two staff members who would own the system after handover, and set a weekly 30-minute call with comments within five working days.

You have done it well if

- ☐ It fits on one page and both sides have signed it.
- ☐ Future owners of the work are named.
- ☐ Working norms, such as meetings and comment times, are specific.

Related tools

- C** Problem statement worksheet [p. 6](#)
- N** Statement of work and change control [p. 16](#)
- S** Kick-off and workplan [p. 22](#)

Engagement charter

One page that both you and the client sign, saying what you are doing together and how you will work.

USE IT

In the first week after the contract is signed.

TAKES ABOUT

45 minutes

YOU NEED

The contract and the proposal

Your template

Assignment: _____ Date: _____

1 Objective

One sentence, in the client's words.

.....

2 Deliverables

What you will hand over.

.....

3 Roles

Who does what on both sides.

.....

4 Timeline

Key dates and gates.

.....

5 Top risks

Two or three, with what you will do.

.....

6 Ways of working

Check-ins, response times, reviewers.

.....

How to use it

- 1** Write the objective in the client's words
- 2** Add scope, deliverables, roles, timeline and top risks
- 3** Agree ways of working: check-ins, response times, reviewers

Watch out for

Writing it in consultant jargon the client will not read

Not getting it signed

Check your draft with AI (remove names first)

Turn this proposal and contract into a one-page engagement charter: [proposal summary].

Kick-off and workplan

CONCEPT GUIDE

Template on p. 23

WHAT IT IS

The kick-off is the first working meeting with the client after signing. Its job is to confirm the questions, the approach, the timeline and who does what, so nobody starts with a different picture. The workplan is the week-by-week schedule that comes out of it. It shows activities, the milestones the client must review or approve, and what the client needs to do at each step. A good kick-off and workplan prevent most delays before they happen.

Why it matters in M&E consulting

- Evaluations often slip because of client tasks, such as sharing data or arranging field access; the workplan makes these visible.
- Review periods agreed at kick-off stop reports waiting weeks for comments.
- Gates where the client approves each stage reduce the risk of surprises at the end.

Key principles

- 1 Send an agenda and the draft workplan before the meeting.
- 2 Show what the client must do in each phase, not only what you will do.
- 3 Mark gates where the client reviews and approves.
- 4 Build in realistic review time.
- 5 Send a short note of what was agreed within a day.

Use it when

- ✓ At the start of every assignment, within the first week or two.
- ✓ A new team member or client contact joins midway; revisit the plan with them.
- ✓ After a major change in scope or timing.

Skip it when

- ✗ A one-day task with a single deliverable.
- ✗ The client already runs a formal inception workshop; then bring your workplan to it rather than holding a separate meeting.

WHERE IT COMES FROM

Kick-off meetings and workplans are standard project management practice, used across consulting and evaluation.

IN THE PLAYBOOK'S EXAMPLE

MID-TERM EVALUATION

The mid-term evaluation's kick-off agreed the five evaluation questions, the sample and review rounds of 10 working days. The workplan ran over 14 weeks, from desk review and inception to the final report. Each phase listed a client task, such as introducing field teams or arranging district access. A steering group meeting was set at each gate.

You have done it well if

- ☐ Each phase has a milestone and a client task.
- ☐ Review periods and approval gates are written into the plan.
- ☐ A summary of agreements was sent within one day of the meeting.

Related tools

- N** Engagement charter p. 20
- S** RAID log p. 24
- U** Weekly status note p. 30

S

SET UP TOOL 10 OF 21 · PROJECT MANAGEMENT PRACTICE

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Kick-off and workplan

The first meeting with the client, and a week-by-week plan with checkpoints where the client reviews and approves.

USE IT

In week one.

TAKES ABOUT

1 hour meeting, plus 1 hour to plan

YOU NEED

The contract and the evaluation questions

Your template

Assignment: _____ Date: _____

Weeks	Activity	Checkpoint or deliverable	What the client must do
Group by stage	What happens	What gets approved	Reviews, data, access

How to use it

- 1 Confirm questions, users, timeline and reviewers
- 2 Show the workplan with gates and client review time
- 3 Agree what the client must provide, and by when

Watch out for

- No client review time in the plan
- Checkpoints without a named approver

Check your draft with AI (remove names first)

Build a kick-off agenda and a week-by-week workplan with gates for this assignment: [summary].

RAID log

CONCEPT GUIDE

Template on p. 25

WHAT IT IS

A RAID log is one running list of four kinds of things that can affect your work. Risks are things that might go wrong. Assumptions are things you are treating as true but have not checked. Issues are problems that are already happening. Dependencies are things you cannot start until something else is done. Each item has an owner and a next step, and you review the log every week.

Why it matters in M&E consulting

- Fieldwork depends on things outside your control, such as weather, approvals and access; the log keeps them in view.
- Writing assumptions down, such as 'records are complete', forces you to test them early.
- Sharing the log with the client makes risks a joint responsibility.

Key principles

- 1 Every item needs a named owner and a next step.
- 2 Turn assumptions into checks with a date.
- 3 Move a risk to issues when it actually happens.
- 4 Review it weekly, briefly.
- 5 Close items when they are resolved, so the log stays short.

Use it when

- ✓ Any assignment with fieldwork, several partners or a tight timeline.
- ✓ During inception, to feed the risks section of the inception report.
- ✓ In weekly status updates to the client.

Skip it when

- ✗ A short desk-based task with no external dependencies.
- ✗ The client has its own risk register that you are asked to use instead.

WHERE IT COMES FROM

RAID logs are widely used in project management practice. The four categories help teams track uncertainty in one place.

IN THE PLAYBOOK'S EXAMPLE

MID-TERM EVALUATION

In the mid-term evaluation, the top risk was monsoon rain cutting access to two districts, so fieldwork there was planned first with a phone survey as a fallback. The key assumption was that programme records were complete, checked with a 5% sample in week two. An out-of-date federation list was logged as an issue for district managers. Ethics approval before fieldwork was logged as a dependency.

You have done it well if

- ☐ Every item has an owner, a next step and a date.
- ☐ Each assumption has a planned check.
- ☐ The log was reviewed and updated in the last week.

Related tools

- N** Statement of work and change control **p. 16**
- S** Kick-off and workplan **p. 22**
- U** Weekly status note **p. 30**

S

SET UP TOOL 11 OF 21 · PROJECT MANAGEMENT PRACTICE

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RAID log

One running list of risks, assumptions, issues and dependencies, each with an owner and a next step.

USE IT

From inception, reviewed every week.

TAKES ABOUT

15 minutes a week

YOU NEED

Your workplan

Your template

Assignment: _____ Date: _____

Type	Entry	Owner	Next action	By when
Risk: might happen. Assumption: we believe true. Issue: happening now. Dependency: we need it first.	Plain sentence	A named person	What will be done	A date

How to use it

- 1 Start it at inception with at least five entries
- 2 Give every entry an owner and a next action
- 3 Review it in every status meeting

Watch out for

Entries without an owner

Writing it once and never updating it

Check your draft with AI (remove names first)

From this inception plan, draft a RAID log with five risks, three assumptions, two issues and two dependencies: [plan].

Ghost deck and report

CONCEPT GUIDE

Template on p. 27

WHAT IT IS

A ghost deck, or ghost report, is a draft of your final report's headlines written before you collect any data. Each page or section gets a placeholder headline, your best guess at the finding, and a note on the chart or table that would prove it and the data source needed. You then design your data collection tools to confirm or reject each headline. It keeps the team focused on the evidence that matters and avoids collecting data nobody will use.

Why it matters in M&E consulting

- It links every question in a survey or interview guide to a finding it might support.
- It reveals data gaps early, while you can still change the tools.
- It speeds up the final report, because the structure already exists.

Key principles

- 1 Write headlines as full sentences that state a finding.
- 2 Pair each headline with the chart and data source it needs.
- 3 Treat every headline as a guess to test, not to prove.
- 4 Rewrite or kill headlines when the data disagrees.
- 5 Remove tool questions that do not feed any headline.

Use it when

- ✓ During inception, after the issue tree and before tools are finalised.
- ✓ The team is unsure what the final report should look like.
- ✓ Data collection tools are getting long.

Skip it when

- ✗ An exploratory study where you genuinely have no prior expectations.
- ✗ The team is likely to treat placeholders as conclusions; then use questions as headlines instead.

WHERE IT COMES FROM

The ghost deck is associated with McKinsey and hypothesis-driven consulting practice, where teams sketch the final presentation early to guide analysis.

IN THE PLAYBOOK'S EXAMPLE

MID-TERM EVALUATION

Before fieldwork in the mid-term evaluation, the team wrote 12 headline placeholders. One read: 'Incomes rose most where federations are strong', paired with a chart of income change by district and federation strength from the household survey and records. Another read: 'Federations cost less per member', needing budget data. The survey and focus group guides were designed to confirm or kill each one.

You have done it well if

- ☐ Each headline has a chart idea and a named data source.
- ☐ Every data collection question links to at least one headline.
- ☐ The team has agreed in advance that headlines will change if data disagrees.

Related tools

-  **Issue tree and day-one hypothesis** p. 10
-  **80/20 analysis plan** p. 28
-  **Storyline and action titles** p. 34

S

SET UP TOOL 12 OF 21 · MCKINSEY

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Ghost deck and report

A draft of your final report's headlines, written before you collect any data, with the chart each headline will need.

USE IT

At inception, after the evaluation matrix.

TAKES ABOUT

1 hour

YOU NEED

The evaluation matrix

Your template

Assignment: _____ Date: _____

Page	Headline: a finding, not a topic	Chart or evidence it needs	Where the data comes from
In report order	Your best guess, as a full sentence	Bar chart, quote, table	Survey, records, interviews

How to use it

- 1 Write the report outline as action titles
- 2 Sketch the chart each finding will need
- 3 Check every tool question feeds a headline

Watch out for

Topic headlines such as 'Income', which say nothing

Treating the guesses as conclusions: they are there to be tested

Check your draft with AI (remove names first)

From this evaluation matrix, draft a ghost report: ten action titles and the chart each needs: [matrix].

80/20 analysis plan

CONCEPT GUIDE

Template on p. 29

WHAT IT IS

An 80/20 analysis plan ranks the analyses you could do, so the few that matter most get done first and best. The idea is that a small share of the work often produces most of the value. You list each planned analysis, judge how important it is for the key questions and estimate the days it needs. Then you set an order and push low-value analyses to 'later'. It is a guard against spending your limited analysis time evenly on everything.

Why it matters in M&E consulting

- Evaluation datasets can support dozens of analyses; time and budget support only a few done well.
- It ensures the analyses behind the main recommendations are the most careful.
- It gives you a defensible reason to say no to nice-to-have tables.

Key principles

- 1 Rank by importance to the key questions and decisions.
- 2 Estimate the days for each analysis honestly.
- 3 Do the top three first, and do them well.
- 4 Move the rest to 'later', not to 'never' without telling the client.
- 5 The 80/20 split is a rule of thumb, not a precise law.

Use it when

- ✓ After data collection, before analysis starts.
- ✓ The analysis plan in the inception report is long.
- ✓ Time is running short and you need to cut.

Skip it when

- ✗ The ToR or donor requires a fixed set of indicators that must all be reported.
- ✗ A small dataset where every analysis is quick.

WHERE IT COMES FROM

The principle is named after the economist Vilfredo Pareto, who observed uneven distributions. It was later popularised as the 80/20 rule in quality management and is used across consulting firms.

IN THE PLAYBOOK'S EXAMPLE

MID-TERM EVALUATION

In the mid-term evaluation, the team listed every planned analysis and its importance. Three carried most of the evaluation: income change by district, income by federation strength and cost per active member. These were done first. Attendance trends and training satisfaction were marked low importance and moved to later.

You have done it well if

- ☐ Every planned analysis has an importance rating and a time estimate.
- ☐ The top-ranked analyses link directly to the key questions.
- ☐ Lower-ranked analyses are clearly marked and the client knows.

Related tools

- O** Issue tree and day-one hypothesis **p. 10**
- S** Ghost deck and report **p. 26**
- U** Evidence strength rating **p. 32**



80/20 analysis plan

Ranking the analyses you plan, so the few that matter most get done first and best.

USE IT

Before analysis begins.

TAKES ABOUT

30 minutes

YOU NEED

The evaluation matrix and the data you have

Your template

Assignment: _____ Date: _____

Analysis	Could it change the answer?	Effort	Order
What you will compare or calculate	High or low	Days	Do high-impact ones first

How to use it

- 1 List every analysis you could run
- 2 Score each by its effect on the key question
- 3 Do the top three first and share them early

Watch out for

- Doing analyses in the order data arrives
- Treating every analysis as equally important

Check your draft with AI (remove names first)

Rank these planned analyses by how much each could change the answer to the key question: [list].

Weekly status note

CONCEPT GUIDE

Template on p. 31

WHAT IT IS

A weekly status note is a short update you send the client every week. It has one overall colour, red, amber or green, and five short lines: the headline, progress, next steps, risks and any decision you need from the client. It takes about 15 minutes to write. Regular, honest updates build trust and mean the client is never surprised by a delay.

Why it matters in M&E consulting

- Clients worry most when they hear nothing; a short note every week prevents anxious calls.
- Raising problems early, when they are amber, gives time to fix them together.
- Asking for a clear decision moves things forward instead of waiting.

Key principles

- 1 Keep it to five lines and one colour.
- 2 Be honest about the colour; amber early is better than red late.
- 3 Quote progress in numbers where you can.
- 4 End with a clear decision or 'no decision needed'.
- 5 Send it on the same day every week.

Use it when

- ✓ Every week during active work, especially fieldwork.
- ✓ The client has a steering group or several contacts.
- ✓ Anything is starting to slip.

Skip it when

- ✗ Very short assignments of a week or less; one end-of-task note is enough.
- ✗ The client prefers a fortnightly call with minutes; agree the rhythm at kick-off.

WHERE IT COMES FROM

Weekly status reporting with a red, amber and green rating is common consulting and project management practice.

IN THE PLAYBOOK'S EXAMPLE

MID-TERM EVALUATION

In week six of the mid-term evaluation, the status was amber because rain delayed fieldwork in two districts. Progress was given in numbers: 210 of 400 household surveys and 8 of 12 focus groups. The note set a new target date and warned that a delay beyond two weeks would move the draft report. It asked the client to choose between a one-week later draft and a smaller sample in the delayed districts.

You have done it well if

- ☐ The colour matches the real situation.
- ☐ Progress is stated in numbers against the plan.
- ☐ Any decision needed is clear, with options.

Related tools

- S** Kick-off and workplan **p. 22**
- S** RAID log **p. 24**
- L** Pre-wiring and validation **p. 36**

Weekly status note

A five-line update you send the client every week, with one overall colour: red, amber or green.

USE IT

The same day every week.

TAKES ABOUT

15 minutes

YOU NEED

Your workplan and RAID log

Your template

Assignment: _____ Date: _____

1 Overall status

Red: off track, needs a decision. Amber: at risk, action under way. Green: on track.

2 Why this colour

One sentence.

3 Done this week

Facts, with numbers.

4 Next

With dates.

5 Risks and issues

What could go wrong and what you are doing.

6 Decision needed

A clear choice for the client.

How to use it

- 1 Give one overall colour and say why
- 2 List what was done and what is next
- 3 Ask for any decision the client must make

Watch out for

- Always reporting green
- Not asking for a decision when one is needed

Check your draft with AI (remove names first)

Turn these notes into a weekly status note: overall red, amber or green, progress, next steps, risks, decisions needed: [notes].

Evidence strength rating

CONCEPT GUIDE
Template on p. 33

WHAT IT IS

An evidence strength rating is a label beside each finding saying how solid its evidence is: strong, moderate or limited. You base it on the number and quality of sources, whether they agree and how well the method supports the claim. A small filled circle, called a Harvey ball, can show the rating visually. Readers then know which findings they can act on with confidence and which need more checking. It makes your judgement transparent instead of hidden.

Why it matters in M&E consulting

- Decision-makers often treat every finding as equally certain; ratings correct this.
- Rating forces you to check whether sources agree before you write a finding.
- It protects your credibility when a finding is later questioned.

Key principles

- 1 Define what strong, moderate and limited mean before you rate.
- 2 Count sources and check whether they agree.
- 3 Separate 'something changed' from 'the programme caused it'.
- 4 Write a one-line reason for every rating.
- 5 Do not hide limited findings; label them.

Use it when

- ✓ Drafting findings in any evaluation report.
- ✓ Findings rest on very different amounts of evidence.
- ✓ Findings will inform funding or expansion decisions.

Skip it when

- ✗ Routine monitoring reports that only present indicator values.
- ✗ The client requires a formal evidence grading system; use theirs instead.

WHERE IT COMES FROM

Rating evidence draws on evaluative rubrics, described in the work of evaluator Jane Davidson, and on evidence grading in research. Harvey balls are a common visual convention in consulting reports.

IN THE PLAYBOOK'S EXAMPLE

MID-TERM EVALUATION

In the mid-term evaluation, 'Incomes rose in two districts' was rated strong, because the survey, programme records and focus groups all agreed. 'Federations cause the gains' was rated moderate: the pattern was clear, but other causes were possible. 'Cost per member is reasonable' was rated limited, as it relied on one incomplete source. The report showed each rating beside its finding.

You have done it well if

- Every finding has a rating and a short reason.
- The rating scale is defined in the methodology section.
- Claims about cause are rated separately from claims about change.

Related tools

- S** Ghost deck and report p. 26
- U** 80/20 analysis plan p. 28
- L** Storyline and action titles p. 34



Evidence strength rating

A label beside each finding saying how solid its evidence is: strong, moderate or limited.

USE IT

During analysis and report writing.

TAKES ABOUT

30 minutes

YOU NEED

Your findings and their sources

Your template

Assignment: _____ Date: _____

Finding	Sources	Strength	Why
One sentence	Which data supports it	Strong, moderate or limited	Number and agreement of sources

How to use it

- 1 Agree the rating scale at inception
- 2 Rate each finding on sources, quality and consistency
- 3 Show the rating next to the finding

Watch out for

- Rating everything as strong
- Changing the scale halfway through

Check your draft with AI (remove names first)

For each finding below, rate the strength of evidence (strong, moderate, limited) and explain why in one line: [findings with sources].

Storyline and action titles

CONCEPT GUIDE

Template on p. 35

WHAT IT IS

The pyramid principle is a way of structuring a report or presentation with the answer first. At the top is one governing message: your main conclusion and what to do. Under it come three to five key lines, the reasons that support it. Under each key line sits the evidence. If you write each section title as a full sentence, called an action title, a reader can understand the whole story from the titles alone.

Why it matters in M&E consulting

- Busy decision-makers often read only the first page and the headings.
- It forces you to decide what your evaluation actually concludes.
- Action titles make weak or unsupported points easy to spot.

Key principles

- 1 Start with the answer, not the background.
- 2 Write titles as full sentences that make a point.
- 3 Each key line must support the governing message.
- 4 Keep three to five key lines at each level.
- 5 Check: can someone read only the titles and get the story?

Use it when

- ✓ Writing the key messages, executive summary or a findings presentation.
- ✓ A draft report feels long and hard to follow.
- ✓ Before a validation workshop, to test the storyline.

Skip it when

- ✗ Technical annexes and methods sections, where completeness matters more than argument.
- ✗ Participatory reporting where conclusions are developed with stakeholders; then build the pyramid after the session.

WHERE IT COMES FROM

The pyramid principle was developed by Barbara Minto, who worked at McKinsey, and is set out in her book on the subject. Action titles are a widely used consulting convention.

IN THE PLAYBOOK'S EXAMPLE

MID-TERM EVALUATION

The mid-term evaluation's governing message read: 'Results follow strong federations; invest in them before expanding.' Four key lines supported it. Incomes rose in two districts and were flat in two others. The gains tracked federation strength, federated groups were most likely to last, and strengthening federations cost less per member than opening new districts.

You have done it well if

- ☐ The governing message is one sentence with a conclusion and an action.
- ☐ Every section title is a full sentence that makes a point.
- ☐ Reading the titles alone tells the whole story.

Related tools

- S** Ghost deck and report p. 26
- U** Evidence strength rating p. 32
- L** Pre-wiring and validation p. 36

L

LAND TOOL 16 OF 21 · BARBARA MINTO; MCKINSEY



Storyline and action titles

Writing the answer first, then three to five reasons, then the evidence under each, so the titles alone tell the story.

USE IT

When you outline the report or presentation.

TAKES ABOUT

1 hour

YOU NEED

Your findings

Your template

Assignment: _____ Date: _____

1 Governing message

The one-sentence answer to the key question.

.....

.....

2 Supporting title 1

A full-sentence finding that proves part of the message.

.....

.....

3 Supporting title 2

Read all titles in a row: do they make the argument?

.....

.....

4 Supporting title 3

Read all titles in a row: do they make the argument?

.....

.....

5 Supporting title 4

Read all titles in a row: do they make the argument?

.....

.....

How to use it

- 1 Write the governing message in one sentence
- 2 Write three to five supporting titles that prove it
- 3 Test: read only the titles aloud

Watch out for

Section titles that are topics, such as 'Background' or 'Findings'

More than five supporting points

Check your draft with AI (remove names first)

Rewrite these slide or section titles as full-sentence findings, so the titles alone tell the story: [titles and findings].

Pre-wiring and validation

CONCEPT GUIDE
Template on p. 37

WHAT IT IS

Pre-wiring means talking privately with the people most affected by a difficult finding before the big meeting where it is presented. You share the finding and the data, listen to their view and ask what would make it workable. People are much less likely to reject findings they have had time to understand. Pre-wiring is not about changing findings to please people; it is about avoiding surprise and improving accuracy. Often the person affected suggests the solution themselves.

Why it matters in M&E consulting

- A hard finding presented by surprise in a group often triggers defence, not action.
- Private conversations catch factual errors before they are made public.
- People who help shape the response are more likely to own it.

Key principles

- 1 Share the data, not only the conclusion.
- 2 Listen more than you talk.
- 3 Correct facts; do not soften judgements without evidence.
- 4 Ask what would make the finding easier to act on.
- 5 Keep a short note of each conversation.

Use it when

- ✓ A finding is negative or sensitive for a specific person or team.
- ✓ A recommendation challenges a senior person's plan.
- ✓ Before a validation or findings workshop.

Skip it when

- ✗ Independence would be compromised, for example if it invites pressure to change findings; then use a formal factual-accuracy check.
- ✗ Findings are routine and not sensitive for anyone.

WHERE IT COMES FROM

Pre-wiring is a common practice in McKinsey and other consulting firms. Evaluation practice has similar steps, such as sharing draft findings for factual checks.

IN THE PLAYBOOK'S EXAMPLE

MID-TERM EVALUATION

Before the mid-term evaluation's findings workshop, the evaluator met the district manager whose district showed no income gains. The evaluator shared the data and the comparison with other districts and asked what made her district different. She explained local factors and, in the workshop, proposed the fix herself. A second meeting with the programme director covered pausing expansion and what would make that acceptable to the board.

You have done it well if

- ☐ Everyone facing a hard finding heard it privately first.
- ☐ Factual corrections were made and noted; judgements were kept unless new evidence emerged.
- ☐ No one at the workshop was surprised by a finding about their own work.

Related tools

- C** Stakeholder power and interest map p. 8
- N** RAPID decision roles p. 18
- L** Storyline and action titles p. 34

Pre-wiring and validation

Talking privately to the people most affected by a hard finding before the big meeting.

USE IT

A week before the findings or validation workshop.

TAKES ABOUT

30 minutes per person

YOU NEED

Your draft findings

Your template

Assignment: _____ Date: _____

Person	The finding that affects them	What you will share	What you want to learn
A named role	In one sentence	Finding and evidence	Their explanation and ideas

How to use it

- 1 Find who is most affected by each hard finding
- 2 Meet them privately first and listen
- 3 Use the workshop to test findings and agree actions

Watch out for

- Using it to negotiate the finding away
- Skipping the most senior person

Check your draft with AI (remove names first)

Draft talking points for a one-to-one pre-wire on this difficult finding, including likely objections: [finding].

Impact and ease prioritisation

CONCEPT GUIDE

Template on p. 39

WHAT IT IS

Impact and ease prioritisation sorts recommendations on two scales: how much impact each would have, and how easy it is to put into practice. Recommendations with high impact and high ease are quick wins. High impact but harder ones are major projects. Low impact but easy ones are fill-ins, and low impact and hard ones are usually dropped. The result is a short, ordered list that a client can actually act on.

Why it matters in M&E consulting

- Evaluations often end with too many recommendations of equal weight; this shows what matters most.
- It helps clients plan, with quick wins now and major projects scheduled.
- Scoring together with the client builds ownership of the recommendations.

Key principles

- 1 Define the scoring scales, for example 1 to 5, before you score.
- 2 Score impact against the key question, not general good practice.
- 3 Ask the people who will implement to judge ease.
- 4 Be willing to drop low-impact recommendations.
- 5 Present quick wins first, but do not let them replace major projects.

Use it when

- ✓ You have more than five draft recommendations.
- ✓ During a validation or recommendations workshop with the client.
- ✓ Before writing the recommendations section of the report.

Skip it when

- ✗ There are only two or three recommendations and their order is obvious.
- ✗ A donor requires recommendations to follow a fixed structure, such as by evaluation criterion; then prioritise within each group.

WHERE IT COMES FROM

The impact and ease matrix, sometimes called an impact and effort matrix, is widely used in consulting practice and in quality improvement work.

IN THE PLAYBOOK'S EXAMPLE

MID-TERM EVALUATION

The mid-term evaluation had 11 draft recommendations. Scored with the programme team, three were quick wins, such as tracking income every six months and sharing results with members. Four were major projects, led by strengthening federations before expanding. Two, including a new training model, were dropped as low impact.

You have done it well if

- Every recommendation has an impact and an ease score.
- Ease was judged with the people who will implement.
- The final list is shorter and ordered, with drops explained.

Related tools

- N** RAPID decision roles p. 18
- L** Storyline and action titles p. 34
- T** Management response tracker p. 40

Impact and ease prioritisation

Sorting recommendations by how much they would help and how easy they are, into quick wins, major projects, fill-ins and drops.

USE IT

When you draft recommendations, ideally with the client.

TAKES ABOUT

30 minutes

YOU NEED

Your draft recommendations

Your template

Assignment: _____ Date: _____

Recommendation	Impact 1 to 5	Ease 1 to 5	Group
One action	How much it helps	How easy it is	Quick win, major project, fill-in or drop

How to use it

- 1 Score each recommendation on impact and ease
- 2 Place them on the grid
- 3 Lead with quick wins and plan major projects

Watch out for

Scoring alone, without the client

Labelling everything a major project

Check your draft with AI (remove names first)

Score these recommendations from 1 to 5 on impact and ease, and say which are quick wins: [recommendations].

Management response tracker

CONCEPT GUIDE

Template on p. 41

WHAT IT IS

A management response is the client's formal reply to each recommendation in an evaluation. For each one, the client says whether it is accepted, partly accepted or not accepted. For accepted ones, it names the action, an owner and a date. The tracker then follows progress at later check-ins. It turns a report into a set of commitments and shows whether the evaluation was used.

Why it matters in M&E consulting

- Without a response, recommendations are easily forgotten after the report is approved.
- It makes use of the evaluation visible, which matters for the evaluator's reputation and future work.
- Follow-up check-ins create a reason to stay in contact with the client.

Key principles

- 1 The client writes the response, not the evaluator; you can facilitate.
- 2 Every accepted recommendation has an action, owner and date.
- 3 'Not accepted' is allowed, with a reason.
- 4 Agree a check-in date, such as three months later.
- 5 Keep it to one table.

Use it when

- ✓ After the final evaluation report is approved.
- ✓ The client or donor asks for evidence of use.
- ✓ For any evaluation with actionable recommendations.

Skip it when

- ✗ Monitoring reports without recommendations.
- ✗ The client already has its own response system; then offer to fill in theirs.

WHERE IT COMES FROM

Management responses are part of evaluation practice in the UN system, set out in guidance from the United Nations Evaluation Group (UNEG), and are used by many donors and foundations.

IN THE PLAYBOOK'S EXAMPLE

MID-TERM EVALUATION

After the mid-term evaluation, the foundation accepted 9 of 11 recommendations. Strengthening federations first was accepted, with a federation support plan owned by the programme director. Pausing new districts was partly accepted, as a one-year pause. At the three-month check-in, six actions were on track.

You have done it well if

- ☐ Every recommendation has a response and, if accepted, an owner and date.
- ☐ Reasons are given for partial or non-acceptance.
- ☐ A check-in date is set and the tracker is updated after it.

Related tools

- N** RAPID decision roles [p. 18](#)
- L** Impact and ease prioritisation [p. 38](#)
- T** After-action review [p. 42](#)

Management response tracker

A table where the client formally replies to each recommendation: accepted, partly accepted or not accepted, with an action, owner and date.

USE IT

When the final report is delivered.

TAKES ABOUT

1 hour with the client

YOU NEED

The final recommendations

Your template

Assignment: _____ Date: _____

Recommendation	Response	Action	Owner	By when
As written in the report	Accepted, partly, not accepted	What they will do	A named role	A date

How to use it

1 Draft the template with the final report

2 Help the client fill it in, without writing it for them

3 Check back at three and six months

Watch out for

Writing the client's responses for them

No date to check back

Check your draft with AI (remove names first)

Draft a management response template for these recommendations, with columns for response, action, owner and date: [recommendations].

After-action review

CONCEPT GUIDE

Template on p. 43

WHAT IT IS

An after-action review is a short team conversation held after an assignment, or a major stage, to learn from it. It uses four questions: what did we expect to happen, what actually happened, why was there a difference, and what will we do next time. It takes about 30 minutes and focuses on learning, not blame. The answers go straight into your next proposal, workplan or pricing.

Why it matters in M&E consulting

- Consultants often repeat the same estimating errors; this catches them.
- It turns experience into specific changes, such as days or methods.
- It is a simple way to model learning, which is the 'L' in MEL.

Key principles

- 1 Use the four questions in order.
- 2 Focus on what happened, not who is to blame.
- 3 Everyone speaks, including junior team members.
- 4 End with one or two specific changes.
- 5 Write the changes where you will see them next time.

Use it when

- ✓ At the end of every assignment.
- ✓ After a major stage, such as fieldwork.
- ✓ After something went notably well or badly.

Skip it when

- ✗ Team members cannot speak openly, for example in front of the client; hold a separate internal review.
- ✗ Immediately after a stressful event; wait a day or two.

WHERE IT COMES FROM

The after-action review was developed by the US Army as a structured way for teams to learn after an operation. It is now used widely in organisations, including in development and humanitarian work.

IN THE PLAYBOOK'S EXAMPLE

MEL SET-UP

The after-school learning NGO assignment had planned two days of staff training. The review found training took four days, because staff needed more hands-on practice with the forms on their phones. What worked was practice with real forms. The next proposal priced training at four days, not two.

You have done it well if

- All four questions are answered.
- The difference between plan and reality is explained, not just noted.
- At least one specific change is recorded for the next assignment.

Related tools

- Three-option proposal [p. 12](#)
- T Management response tracker [p. 40](#)
- T Client feedback score [p. 44](#)

T

TRANSFER TOOL 20 OF 21 · US ARMY

○ ○ ○ ○ ○ ●

After-action review

A 30-minute team conversation after the work, using four questions, to learn what to repeat and what to change.

USE IT

Within a week of the final report.

TAKES ABOUT

30 minutes

YOU NEED

The team and the original workplan

Your template

Assignment: _____ Date: _____

1 What was supposed to happen?

From the workplan and proposal.

.....

.....

.....

2 What actually happened?

Facts only.

.....

.....

.....

3 Why was there a difference?

Causes, not people.

.....

.....

.....

4 What will we keep?

What worked.

.....

.....

.....

5 What will we change next time?

One or two concrete changes.

.....

.....

.....

How to use it

- 1 What was supposed to happen?
- 2 What actually happened, and why?
- 3 What will we keep, and change, next time?

Watch out for

Turning it into a search for someone to blame

Ending without one written change

Check your draft with AI (remove names first)

Turn these notes into an after-action review: planned, actual, why, keep, change: [notes].

Client feedback score

CONCEPT GUIDE

Template on p. 45

WHAT IT IS

A client feedback score is three short questions you ask every client at the end of an assignment. The first is: on a scale of 0 to 10, how likely are you to recommend us to a colleague? The second asks what was most valuable, and the third what could be better. You can also ask who else might benefit. The number is less important than the conversation it starts.

Why it matters in M&E consulting

- Most consulting work comes from referrals and repeat clients; this shows where you stand.
- A low score is a chance to fix a relationship before it is lost.
- The open answers tell you what to keep and what to change.

Key principles

- 1 Ask the same questions every time.
- 2 Ask soon after the final deliverable.
- 3 Follow up any score of 6 or below with a call.
- 4 Thank people for honest criticism.
- 5 Track scores over time, not one at a time.

Use it when

- ✓ At the end of every assignment.
- ✓ After a major milestone on a long assignment.
- ✓ You want to ask for a referral or testimonial.

Skip it when

- ✗ The client relationship has ended badly and a call is needed first.
- ✗ A formal client satisfaction process is already required by your firm.

WHERE IT COMES FROM

The first question comes from the Net Promoter Score, introduced by Fred Reichheld of Bain & Company in 2003. The short version here is adapted for independent consultants.

IN THE PLAYBOOK'S EXAMPLE

MEL SET-UP

At the end of the MEL set-up, the NGO's director scored 9. The most valuable thing was that staff could run the dashboard alone; the improvement was a shorter final report. She named two NGOs in the next district who might need similar help. A score of 6 from another client led to a call that saved the relationship.

You have done it well if

- ☐ All three questions were asked and recorded.
- ☐ Any low score was followed up personally.
- ☐ Feedback led to at least one change or a referral.

Related tools

- C** Bid or no-bid gate p. 4
- T** Management response tracker p. 40
- T** After-action review p. 42

T

TRANSFER TOOL 21 OF 21 · BAIN (NET PROMOTER, REICHHELD 2003)



Client feedback score

Three short questions you ask every client at the end of an assignment, starting with how likely they are to recommend you.

USE IT

In the final meeting or by email the week after.

TAKES ABOUT

10 minutes

YOU NEED

Nothing but the courage to ask

Your template

Assignment: _____ Date: _____

1 How likely are you to recommend us to a colleague, from 0 to 10?

Ask as written.

.....

.....

.....

2 What is the main reason for your score?

Listen; do not defend.

.....

.....

.....

3 What would have made it a 10?

Your best improvement ideas come from here.

.....

.....

.....

4 Who else might benefit from work like this?

Ask only if the score is 9 or 10.

.....

.....

.....

How to use it

- 1 Ask every client, every time
- 2 Always ask why, and listen
- 3 Call anyone who scores 6 or below

Watch out for

Only asking the clients you think are happy

Not calling anyone who scores 6 or below

Check your draft with AI (remove names first)

Draft a three-question feedback form for the end of an assignment, including the 0 to 10 recommendation question: [assignment].

PART 2 NINE DOCUMENTS

02

Documents, section by section.

The nine documents every consultant writes, from the technical proposal to the key-expert CV. Each opens with a concept guide: what the document does, who reads it and what a strong version looks like. Then draft a few lines per section, and expand in Word.

**22. Technical proposal****pp. 48-49**

Use it: Responding to a ToR or a client request

**23. Inception report****pp. 50-51**

Use it: Two to four weeks after signing, before data collection

**24. Evaluation report****pp. 52-53**

Use it: At the end of the evaluation

**25. Invoice****pp. 54-55**

Use it: When a payment milestone is reached

**26. Informed consent script****pp. 56-57**

Use it: Before every interview, survey or focus group

**27. Key informant interview guide****pp. 58-59**

Use it: Interviewing staff, officials, partners or experts

**28. Focus group discussion guide****pp. 60-61**

Use it: Group discussions with 6 to 10 people from similar backgrounds

**29. Data management plan****pp. 62-63**

Use it: At inception, for every evaluation that collects data

**30. Key-expert CV (donor format)****pp. 64-65**

Use it: Bidding for donor, UN or firm-led assignments

DRAFT HERE

A few lines per section on the dotted lines, before you open a blank file.

EXPAND IN WORD

The web playbook downloads each template as a Word file.

SEE AN EXAMPLE

Filled-in examples are in the web playbook.

Technical proposal

CONCEPT GUIDE

Template on p. 49

WHAT IT IS

A technical proposal is your written offer to do an assignment, usually in response to a ToR. It shows that you understand the problem, explains how you will answer the questions and why your team is right for it. It is paired with a financial proposal, which sets out the price. In competitive bids, a panel scores it against published criteria.

WHO READS IT, AND WHAT THEY LOOK FOR

An evaluation panel or the client's programme and M&E staff. They look for understanding of the context, a sound and feasible method, a realistic workplan and a qualified team, often against a scoring grid.

TYPICAL LENGTH

Usually 10 to 25 pages plus annexes, or the page limit set in the ToR. Small assignments may need only 3 to 5 pages.

Why it matters

- It is the first sample of your thinking and writing the client sees.
- Commitments made here become the basis of the contract.
- A clear approach section makes inception much faster.

Marks of a strong version

- 1 Opens with the client's problem, not your history.
- 2 Groups the ToR questions and shows a first hypothesis.
- 3 Includes a draft evaluation matrix.
- 4 Has a workplan and budget that match each other.
- 5 Follows the ToR's order and scoring criteria.

Write it when

- ✓ Responding to a ToR or request for proposals.
- ✓ A client asks for a written offer after a discovery call.
- ✓ Joining a consortium bid led by another firm.

Common mistakes

- ✗ Copying the ToR back to the client as 'understanding'.
- ✗ Listing methods without saying which question each answers.
- ✗ A workplan, team days and budget that do not add up.

You have done it well if

- ☐ A panel member could find each scoring criterion addressed quickly.
- ☐ Every method is linked to an evaluation question.
- ☐ Days, workplan and price are consistent across the document.

Technical proposal

Use it: Responding to a ToR or a client request. Write a few lines per section here as a first draft, then expand in Word. The web playbook downloads this template as a Word file.

1 Cover letter

One page: who you are, why this assignment, your one-line approach, and contact details.

2 Understanding of the assignment

The problem in your words, the decision the findings will serve, and what you read between the lines of the ToR.

3 Approach and methodology

Your first hypothesis, the grouped evaluation questions, design, methods, sampling and their limits. Include a draft evaluation matrix.

4 Ethics and data protection

Consent, anonymity, safeguarding, data storage and deletion, and how you will use AI.

5 Workplan

Stages, deliverables and dates, with client review time built in. A simple week-by-week chart.

6 Team

Who does what, days per person, and why each person fits. CVs in the annex.

7 Relevant experience

Two or three similar assignments: client, year, what you did, what changed.

8 Risks and how you will manage them

The top five risks, each with a mitigation.

9 Financial proposal

Days by role and stage, rates, expenses, contingency, taxes, and the payment schedule you propose.

10 Annexes

CVs, references, sample work, registration documents.

Inception report

CONCEPT GUIDE

Template on p. 51

WHAT IT IS

An inception report is written early in an evaluation, after initial reading and conversations but before data collection. It confirms the evaluation questions and sets out exactly how they will be answered: the design, methods, sample, analysis and workplan. Once the client approves it, it becomes the agreed plan for the rest of the work. It is the best moment to correct misunderstandings from the ToR.

WHO READS IT, AND WHAT THEY LOOK FOR

The client's programme, M&E and management staff, and sometimes a steering or reference group. They check that the questions are right, the methods are credible and the plan is feasible.

TYPICAL LENGTH

Typically 15 to 30 pages plus annexes such as tools, the evaluation matrix and the sampling plan.

Why it matters

- It locks in the agreed questions and methods, protecting both sides from later disputes.
- It shows the evaluation matrix, which links questions to evidence.
- Approval is often a payment milestone.

Marks of a strong version

- 1 Explains any changes from the ToR and why.
- 2 Includes a complete evaluation matrix.
- 3 Shows the sample size calculation and its limits.
- 4 States the risks and what the evaluation cannot say.
- 5 Includes a draft outline of the final report.

Write it when

- ✓ Two to four weeks after signing, before data collection.
- ✓ Any evaluation with more than a few days of fieldwork.
- ✓ The ToR questions need refining or reducing.

Common mistakes

- ✗ Repeating the proposal without new learning from the inception phase.
- ✗ Leaving ethics and data management vague.
- ✗ Promising more than the time and budget can deliver.

You have done it well if

- ☐ Every evaluation question appears in the matrix with sources and methods.
- ☐ The client can see exactly what will happen, when and who is involved.
- ☐ Limitations are stated plainly.

Inception report

Use it: Two to four weeks after signing, before data collection. Write a few lines per section here as a first draft, then expand in Word. The web playbook downloads this template as a Word file.

1 Introduction and purpose

Why the evaluation is happening, who will use it, and for which decisions.

2 Programme background and theory of change

What the programme does and how it expects change to happen. Include a diagram.

3 Evaluation questions

The agreed questions, grouped, with any changes from the ToR explained.

4 Evaluation matrix

Each question with indicators or criteria, sources, methods and analysis.

5 Design and methods

The design, data collection methods, sampling (with your sample size calculation) and analysis plan.

6 Ethics and data management

Consent, protection, safeguarding, approvals, data storage and AI use.

7 Workplan and deliverables

Dates, responsibilities, review rounds.

8 Risks and limitations

What could go wrong, and what the evaluation will not be able to say.

9 Report outline

The structure of the final report, ideally as draft headlines.

10 Annexes

Draft tools, stakeholder list, documents reviewed.

Evaluation report

CONCEPT GUIDE
Template on p. 53

WHAT IT IS

An evaluation report presents what the evaluation found, what it concludes and what it recommends. It answers each evaluation question with evidence, makes a judgement and sets out practical recommendations. A strong report puts the key messages first, so busy readers can act on them. Annexes hold the technical detail for those who want to check it.

WHO READS IT, AND WHAT THEY LOOK FOR

Senior decision-makers read the key messages and summary; programme staff read the findings and recommendations; technical reviewers read the methods and annexes. Each looks for clear answers they can trust and use.

TYPICAL LENGTH

Often 25 to 50 pages plus annexes, with a one-page key messages section and an executive summary of about three pages.

Why it matters

- It is the main product the client pays for and remembers.
- Its recommendations shape real decisions about programmes and funding.
- It is often published or shared, so it represents your work publicly.

Marks of a strong version

- 1 Leads with the answers, not the methods.
- 2 Organises findings by evaluation question.
- 3 Rates the strength of evidence for each finding.
- 4 Separates findings, conclusions and recommendations.
- 5 Makes each recommendation specific, prioritised and owned.

Write it when

- ✓ At the end of an evaluation or a major review.
- ✓ A donor requires a formal report.
- ✓ For mid-term, final or thematic evaluations.

Common mistakes

- ✗ Burying the main messages after long background sections.
- ✗ Recommendations that do not follow from the findings.
- ✗ Hiding limitations in an annex.

You have done it well if

- ☐ A reader of the first page knows the answers and what to do.
- ☐ Each recommendation can be traced back to a finding.
- ☐ Limitations and evidence strength are clear.

Evaluation report

Use it: At the end of the evaluation. Write a few lines per section here as a first draft, then expand in Word. The web playbook downloads this template as a Word file.

1 Key messages (1 page)

The answer to each evaluation question, and what to do, in plain language.

.....

2 Executive summary (3 pages)

Purpose, methods in brief, findings by question, conclusions and recommendations.

.....

3 Introduction

Purpose, scope, users and the evaluation questions.

.....

4 Programme and context

What the programme does and what was happening around it.

.....

5 Methodology and limitations

Design, methods, sample, analysis, ethics and what the evaluation could not do.

.....

6 Findings by evaluation question

One section per question; each finding with its evidence and a strength rating.

.....

7 Conclusions

What the findings mean together; your evaluative judgement against the criteria.

.....

8 Recommendations

Specific, prioritised, feasible, each with a suggested owner and timeframe.

.....

9 Lessons

What others could learn beyond this programme.

.....

10 Annexes

ToR, evaluation matrix, tools, list of people consulted (with consent), documents reviewed, management response template.

.....

Invoice

CONCEPT GUIDE

Template on p. 55

WHAT IT IS

An invoice is a formal request for payment when you reach a milestone in your contract. It records who you are, who the client is, what was delivered, the amount due and how to pay. It is also a tax and accounting record for both sides. A clear, correct invoice gets paid faster.

WHO READS IT, AND WHAT THEY LOOK FOR

The client's finance team, who check it against the contract, purchase order and approved deliverable. They look for correct details, matching amounts and the right tax information.

TYPICAL LENGTH

One page.

Why it matters

- Late or incorrect invoices are a common cause of cash flow problems for consultants.
- Linking each invoice to a contract clause avoids queries.
- Running numbers and complete records make tax filing easier.

Marks of a strong version

- 1 Uses a unique running invoice number.
- 2 Names the milestone and the contract clause.
- 3 Shows fee, taxes and total clearly.
- 4 States the due date and full bank details.
- 5 Matches the client's purchase order or contract number.

Write it when

- ✓ A payment milestone in the contract is reached.
- ✓ For agreed expenses, if the contract allows reimbursement.
- ✓ A change request with a fee has been approved.

Common mistakes

- ✗ Missing the client's contract or purchase order number.
- ✗ Tax details that are wrong or missing.
- ✗ Sending the invoice before the milestone is formally accepted.

You have done it well if

- ☐ The finance team can match it to the contract without asking anything.
- ☐ Amounts and taxes are correct.
- ☐ The due date and bank details are complete.

Invoice

Use it: When a payment milestone is reached. Write a few lines per section here as a first draft, then expand in Word. The web playbook downloads this template as a Word file.

1 Your details

Name or firm name, address, PAN and GST number if registered, email and phone.

.....

.....

.....

2 Client details

Organisation name, address, GST number if any, contact person, purchase order or contract number.

.....

.....

.....

3 Invoice number and date

A running number (for example HF-2026-014) and the date of issue.

.....

.....

.....

4 Description

The milestone, for example 'Mid-term evaluation: inception report submitted on 14 November 2026', and the contract clause it refers to.

.....

.....

.....

5 Amounts

Professional fee, GST if registered, total payable. Note that the client may deduct TDS.

.....

.....

.....

6 Payment terms

Due date (for example within 15 days) and bank details: account name, number, IFSC, bank and branch.

.....

.....

.....

7 Signature

Your signature, or 'This is a computer-generated invoice'.

.....

.....

.....

Informed consent script

CONCEPT GUIDE
Template on p. 57

WHAT IT IS

An informed consent script is the words you say, or the form you share, before every interview, survey or focus group. It explains who you are, what the study is about, what taking part involves, and that taking part is voluntary and confidential. The person then agrees or declines, and you record their answer. It is an ethical duty, not a formality.

WHO READS IT, AND WHAT THEY LOOK FOR

Participants, who need to understand clearly what they are agreeing to. Ethics committees and clients also review it to check that it protects people.

TYPICAL LENGTH

About one page, or one to two minutes when read aloud, in the participant's language.

Why it matters

- People have the right to decide freely whether to share their experiences.
- Clear consent protects participants, the client and you.
- Ethics approval and many data protection laws require it.

Marks of a strong version

- 1** Uses plain, local language.
- 2** States clearly that people can refuse or stop at any time without losing services.
- 3** Explains how answers are kept confidential.
- 4** Asks separately for consent to recording.
- 5** Gives a contact for questions or complaints.

Write it when

- ✓ Before every interview, survey or focus group.
- ✓ Before recording audio, video or photographs, which need separate consent.
- ✓ Re-contacting people for follow-up.

Common mistakes

- ✗ Using technical or legal wording people cannot follow.
- ✗ Implying that services depend on taking part.
- ✗ Not recording whether consent was given.

You have done it well if

- ☐ A participant could repeat back what they agreed to.
- ☐ Refusal is presented as a real, safe option.
- ☐ Consent and recording consent are recorded separately.

Informed consent script

Use it: Before every interview, survey or focus group. Write a few lines per section here as a first draft, then expand in Word. The web playbook downloads this template as a Word file.

1 Introduction

Your name, who you work for, and that you are independent of the programme if true.

2 Purpose

What the study is about, in one or two plain sentences.

3 What taking part involves

What you will ask, how long it takes, and whether you will record or take notes.

4 Voluntary

They can say no, skip any question or stop at any time, and it will not affect any services.

5 Confidentiality

How their answers are protected; names are not reported; who will see the data.

6 Risks and benefits

Any possible discomfort, and that there is no direct payment or benefit unless there is.

7 Questions and contact

Who to contact with questions or complaints.

8 Agreement

'Do you agree to take part?' Record verbal or written consent, and consent to recording separately.

Key informant interview guide

CONCEPT GUIDE

Template on p. 59

WHAT IT IS

A key informant interview guide is the list of topics and questions you use when interviewing someone with particular knowledge, such as programme staff, officials or experts. It is semi-structured: the main questions are fixed, but you follow up with probes. Each topic links to an evaluation question. The guide keeps interviews consistent across interviewers while leaving room to explore.

WHO READS IT, AND WHAT THEY LOOK FOR

Interviewers use it during the conversation. The client and reviewers check that it covers the evaluation questions and treats respondents respectfully.

TYPICAL LENGTH

Two to four pages, for an interview of 45 to 60 minutes.

Why it matters

- Consistent questions make it possible to compare answers across interviews.
- Linking topics to evaluation questions ensures you collect what you need.
- Good probes reveal examples and reasons, not just opinions.

Marks of a strong version

- 1 Starts with easy questions about the person's role.
- 2 Uses open questions, not yes or no.
- 3 Includes probes such as 'Can you give an example?'.
- 4 Links each topic to an evaluation question.
- 5 Ends by asking what was missed and who else to speak to.

Write it when

- ✓ Interviewing staff, government officials, partners or experts.
- ✓ You need depth and explanation rather than numbers.
- ✓ To understand why results differ between places or groups.

Common mistakes

- ✗ Too many questions for the time available.
- ✗ Leading questions that suggest the answer.
- ✗ Not recording the role and context of the respondent.

You have done it well if

- ☐ Each topic maps to an evaluation question.
- ☐ The interview fits in the planned time.
- ☐ Notes record role, date and place, but not names.

Key informant interview guide

Use it: Interviewing staff, officials, partners or experts. Write a few lines per section here as a first draft, then expand in Word. The web playbook downloads this template as a Word file.

1 Opening

Introduction, consent, and an easy first question about their role.

2 Topic 1, linked to an evaluation question

Two or three open questions, each with probes such as 'Can you give an example?'

3 Topic 2

Open questions and probes.

4 Topic 3

Open questions and probes.

5 What could be better

What would they change, and why?

6 Closing

Anything we did not ask? Who else should we talk to? Thanks.

7 Interviewer notes

Date, place, duration, role of the respondent (no name), and first impressions.

Focus group discussion guide

CONCEPT GUIDE
Template on p. 61

WHAT IT IS

A focus group discussion guide is the plan for a facilitated conversation with a small group, usually six to ten people from similar backgrounds. It sets out the opening, ground rules, warm-up, core questions and closing, and may include a participatory exercise such as ranking or mapping. A facilitator leads while a note-taker records. Focus groups reveal shared views, differences and how people talk about an issue.

WHO READS IT, AND WHAT THEY LOOK FOR

Facilitators and note-takers use it in the field. The client and ethics reviewers check that it is relevant, respectful and safe for participants.

TYPICAL LENGTH

Two to three pages, for a discussion of 60 to 90 minutes, plus a note-taker sheet.

Why it matters

- Groups can surface views that individual interviews miss.
- Participatory exercises make discussion concrete and inclusive.
- A clear guide keeps groups across districts comparable.

Marks of a strong version

- 1** Groups people with similar backgrounds so all feel able to speak.
- 2** Sets ground rules, including confidentiality within the group.
- 3** Uses four to six core questions with probes.
- 4** Plans timing and venue around participants' needs.
- 5** Includes a note-taker sheet for quotes and levels of agreement.

Write it when

- ☒ Speaking with programme participants or community members.
- ☒ Exploring shared experiences, norms or perceptions.
- ☒ Validating or explaining survey findings.

Common mistakes

- ☒ Mixing people with very different power, such as staff and participants.
- ☒ Too many questions, leaving no time for discussion.
- ☒ No note-taker, so key points are lost.

You have done it well if

- ☐ Everyone in the group had a chance to speak.
- ☐ Core questions link to evaluation questions.
- ☐ Notes capture quotes and how widely views were shared.

Focus group discussion guide

Use it: Group discussions with 6 to 10 people from similar backgrounds. Write a few lines per section here as a first draft, then expand in Word. The web playbook downloads this template as a Word file.

1 Before the group

Venue, timing that suits participants, a facilitator and a note-taker, consent.

2 Opening and ground rules

Introductions, purpose, confidentiality within the group, no right or wrong answers.

3 Warm-up question

Something everyone can answer, for example how long they have been in their group.

4 Core questions

Four to six open questions tied to the evaluation questions, each with probes.

5 Participatory exercise

Optional: ranking, mapping or a timeline to make discussion concrete.

6 Closing

Summarise what you heard, ask if anything is missing, thank participants.

7 Note-taker sheet

Seating plan by number, key quotes, levels of agreement, body language.

Data management plan

CONCEPT GUIDE
Template on p. 63

WHAT IT IS

A data management plan sets out how data will be collected, stored, protected, shared and eventually deleted during an evaluation. It covers consent, legal requirements, security, removing names and identifiers, use of AI tools, and who owns the data at the end. It is agreed with the client at inception. It turns good intentions about privacy into specific, checkable steps.

WHO READS IT, AND WHAT THEY LOOK FOR

The client, ethics reviewers and your own team. They look for clear, realistic protections, especially for personal or sensitive data.

TYPICAL LENGTH

Two to four pages, or a section of the inception report.

Why it matters

- Evaluations often collect personal and sensitive information about vulnerable people.
- Data protection laws, such as India's DPDP Act, set legal duties.
- Clear rules on AI use prevent personal data being shared with tools by mistake.

Marks of a strong version

- 1 Lists each type of data and whether it is personal or sensitive.
- 2 Names where data is stored and who has access.
- 3 Explains how data is de-identified before analysis or sharing.
- 4 States which AI tools may process which data.
- 5 Sets retention and deletion dates.

Write it when

- ✓ At inception, for every evaluation that collects data.
- ✓ Working with field teams or partner organisations.
- ✓ Planning to use AI tools for analysis.

Common mistakes

- ✗ Generic statements such as 'data will be kept secure' with no detail.
- ✗ No plan for deleting data at the end.
- ✗ Not addressing AI tools at all.

You have done it well if

- ☐ A team member could follow the plan without asking questions.
- ☐ Every type of personal data has a protection step.
- ☐ Deletion and handover arrangements are dated.

Data management plan

Use it: At inception, for every evaluation that collects data. Write a few lines per section here as a first draft, then expand in Word. The web playbook downloads this template as a Word file.

1 Data to be collected

Types of data, sources, and whether any is personal or sensitive.

2 Consent and legal basis

How consent is collected and recorded; the laws that apply, such as India's DPDP Act.

3 Storage and security

Where data is stored, who has access, passwords and encryption.

4 De-identification

How names and identifiers are removed before analysis or sharing.

5 AI use

Which tools may process which data, and only de-identified data where agreed.

6 Retention and deletion

How long data is kept, and how and when it is deleted.

7 Sharing and ownership

What is handed to the client, in what form, and who owns it.

Key-expert CV (donor format)

CONCEPT GUIDE
Template on p. 65

WHAT IT IS

A key-expert CV in donor format is a structured CV used in bids for donor, UN or firm-led assignments. It follows a set layout, often provided by the donor, and focuses on experience relevant to the specific role. Panels usually score CVs against the ToR's expert requirements. It is a tailored document, not your general CV.

WHO READS IT, AND WHAT THEY LOOK FOR

Evaluation panels and procurement officers. They look for qualifications and experience that match the stated requirements, with clear dates, clients and roles.

TYPICAL LENGTH

Typically two to five pages, or the length set by the donor.

Why it matters

- Team CVs can carry a large share of the technical score in many bids.
- A CV that mirrors the ToR makes it easy for a panel to award points.
- Accurate, consistent CVs build the credibility of the whole bid.

Marks of a strong version

- 1 Follows the donor's format exactly.
- 2 Opens with key qualifications that mirror the ToR.
- 3 Lists relevant assignments with dates, client, role and days.
- 4 Is honest and consistent with other team documents.
- 5 Has references who agreed to be named.

Write it when

- ✓ Bidding for donor, UN or firm-led assignments.
- ✓ A lead firm asks you to join a team as a key expert.
- ✓ The ToR specifies a CV format.

Common mistakes

- ✗ Sending a general CV that ignores the ToR.
- ✗ Vague experience entries without dates, roles or clients.
- ✗ Overstating roles or claiming work done by others.

You have done it well if

- ☐ Each ToR requirement can be matched to a line in the CV.
- ☐ Every assignment has dates, client, role and a short description.
- ☐ All facts are accurate and can be checked.

Key-expert CV (donor format)

Use it: Bidding for donor, UN or firm-led assignments. Write a few lines per section here as a first draft, then expand in Word. The web playbook downloads this template as a Word file.

1 Proposed position

The role in this bid, for example 'Team leader'.

.....

2 Personal details

Name, nationality, languages (reading, speaking, writing), contact.

.....

3 Education

Degrees, institutions and years.

.....

4 Key qualifications

Five or six lines that mirror the ToR's expert requirements.

.....

5 Relevant experience

For each assignment: dates, client, country, role, days, design and methods, short description.

.....

6 Employment record

Positions, organisations and dates, most recent first.

.....

7 Publications and training

Optional, short.

.....

8 References

Three people who saw you lead, with permission.

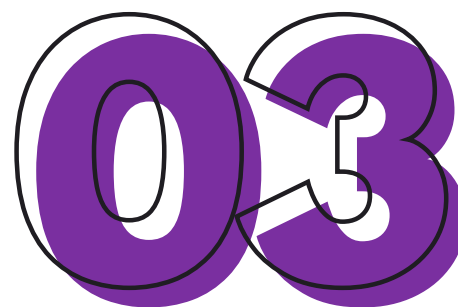
.....

9 Certification

A signed statement that the CV is accurate, if the donor asks for one.

.....

PART 3 SIX TOOLS



Your brand and network.

Good work wins the next assignment only if the right people know about it. These six tools help you become a visible, trusted expert: clear about what you do, easy to find, generous with what you know, and honest in every claim you make.

B

31. Positioning statement and brand canvas pp. 68-69

One page that says who you help, with what problem, how, and what you will not do.

Takes about 60 to 90 minutes

B

32. Professional profile builder pp. 70-71

A headline, about section, featured work and keywords for your LinkedIn and one-page web profile.

Takes about 2 hours the first time, 20 minutes a quarter

B

33. Portfolio case study pp. 72-73

A one-page, anonymised story of one assignment: context, question, approach, what changed and your role.

Takes about 90 minutes, plus client review

B

34. Visibility and content plan pp. 74-75

Twelve months of publishing, speaking, teaching and giving back, one quarter at a time.

Takes about 60 minutes a year, 20 minutes a quarter

B

35. Relationship map and networking tracker pp. 76-77

A short list of the people who matter to your work, by tier, with what you can give and when you will next be in touch.

Takes about 90 minutes to set up

B

36. Event and conference plan pp. 78-79

A one-page plan for before, during and after an event, so a conference turns into relationships and learning.

Takes about 45 minutes before, 30 minutes after

BE CLEAR

Positioning first: a niche people can repeat, and proof they can check.

BE SEEN

Publish, speak, teach and give back, a little every quarter.

BE TRUSTED

Give first, follow up, and never claim more than you did.

An honest brand

In evaluation, your reputation is your independence and your judgement. Being visible matters, but in this field trust comes first. The tools in Part 3 help you become known for your work through writing, speaking, teaching and giving back, within the same ethics you apply to your evaluations.

Six promises to clients and peers

1 Claim only what you did
Name your role precisely. Credit the team, the client and the communities.

2 Ask before you name
Clients, results and quotes appear only with written permission.

3 Anonymise by default
Describe organisations and places by type unless the client agrees otherwise.

4 Share learning, not data
Method and lessons, never respondents' data or confidential findings.

5 Be specific, not superlative
Facts someone can check beat labels like 'leading' or 'top expert'.

6 Give before you ask
Share useful learning freely; ask for referrals only after good work.

Six habits of a trusted expert

- | | |
|---|--|
| ☐ No inflated titles, results or numbers | ☐ Testimonials in the client's approved words |
| ☐ Keep consent records with every case study | ☐ Disclose paid or sponsored content |
| ☐ Refer on work outside your niche | ☐ Correct a public claim the day you find it is wrong |

Before you publish anything about an assignment: check the contract, ask the client, remove identifiers, and keep the written consent.

B

BRAND AND NETWORK TOOL 1 OF 6 · READ THIS FIRST

Positioning statement and brand canvas

CONCEPT GUIDE

Template on p. 69

WHAT IT IS

A positioning statement says, in one sentence, who you help, with what problem, how, and with what result. The brand canvas around it records the parts that make the sentence true: your niche, the problem in the client's words, your proof points, your voice and what you will not do. A niche combines four choices: sector, method, client and place. You can still take other work. The point is that when someone hears your name, they know what to call you about.

Why it matters for your practice

- Commissioners and firms shortlist people they can describe in a phrase; a vague profile is easy to pass over.
- A clear niche lets you build depth, so each assignment makes you better at the next one.
- Saying what you are not makes everything else you say more believable.

Key principles

- 1 Narrow enough to remember, broad enough to make a living.
- 2 Describe the problem in the client's words, not evaluation jargon.
- 3 Every claim needs a proof point someone could check.
- 4 Never inflate: no results you did not achieve, no roles you did not hold.
- 5 Review it each year; good positioning evolves with your work.

Use it when

- ✓ You are starting out independently and your work feels scattered.
- ✓ Your profile, proposals and introductions all describe you differently.
- ✓ You keep winning work you do not enjoy or do not do well.

Skip it when

- ✗ You work inside one firm that sets your positioning; use the canvas only for your own development.
- ✗ You are changing direction; run two small experiments before you commit.

WHERE IT COMES FROM

Positioning as a marketing idea is associated with Al Ries and Jack Trout. Professional-services marketers apply it to firms and to individual experts; the Hinge Research Institute's work on 'visible experts' links a clear specialism to being known and sought out.

IN THE PLAYBOOK'S EXAMPLE

MEL SET-UP

The solo consultant who set up the MEL system for the after-school learning NGO had been using the label 'M&E consultant'. The canvas narrowed this to education, MEL systems, small NGOs and India. Proof points were the 15-day set-up and staff running the dashboard alone. 'Not impact evaluations' went under what the consultant is not. The statement became: 'I help small education NGOs build MEL systems their own staff can run.'

You have done it well if

- ☐ All four parts of the niche are filled with specific words.
- ☐ Every proof point is true, checkable and shareable.
- ☐ Three people who know your work can repeat your statement after hearing it once.

Related tools

- C** Bid or no-bid gate p. 4
- B** Professional profile builder p. 70
- B** Visibility and content plan p. 74

B

BRAND AND NETWORK TOOL 1 OF 6 · POSITIONING AND NICHE SPECIALISATION

Positioning statement and brand canvas

One page that pins down who you help, with what problem, how you do it, and what you will not do.

USE IT

Once a year, and whenever your work drifts or a profile feels generic.

TAKES ABOUT

60 to 90 minutes

YOU NEED

Your last five assignments and what clients said

Your template

Name: _____ Date: _____

1 Your niche: sector x method x client x place

One word or phrase for each. Narrow is memorable; you can still take other work.

2 The problem you solve

In the client's words, not yours. What keeps them up at night?

3 Who you serve best

The client you do your best work for, and the one you should refer on.

4 Proof points

Three facts someone could check: assignments, results, published work, roles.

5 Your voice

Three words for how you work and write.

6 What you are NOT

Work you decline or refer on. This makes the rest believable.

7 Positioning statement

I help [client] with [problem] by [approach], so that [result].

How to use it

- 1 Fill the niche from four parts: sector, method, client and place
- 2 List proof points you can show, not adjectives
- 3 Write the one-sentence statement last, and test it on three people

Watch out for

Choosing a niche so wide it describes everyone

Listing adjectives ('passionate', 'expert') instead of proof

Check your draft with AI (remove names first)

Read this positioning canvas and tell me where it is vague, inflated or too broad for a client to remember: [canvas, no client names].

B

BRAND AND NETWORK TOOL 2 OF 6 · READ THIS FIRST

Professional profile builder

CONCEPT GUIDE

Template on p. 71

WHAT IT IS

Your professional profile is what people find when they look you up: a LinkedIn page and a one-page web profile. The builder gives you a headline formula (role, niche and result), an about section in four moves (problem, approach, proof, invitation), up to three featured items, two or three recommendations, and the keywords commissioners, firms and peers use when they search. Write it once from your positioning, then reuse the same words everywhere, so your CV, proposals and profile tell one story.

Why it matters for your practice

- People usually look you up before they reply to an introduction or shortlist you for a bid.
- A clear headline and the right keywords help the right people find you, and the wrong ones pass by.
- Consistent wording across profile, CV and proposals builds trust; mismatches raise doubts.

Key principles

- 1 Write for the reader who is deciding whether to call you.
- 2 Use the words clients and donors use, such as 'mid-term evaluation' and 'MEL system'.
- 3 Show, then tell: featured work and recommendations do more than adjectives.
- 4 Only name clients, share reports or quote people with their permission.
- 5 Keep it current: review it each quarter and after every assignment.

Use it when

- ✓ You have just written or revised your positioning.
- ✓ You have finished a major assignment you can describe.
- ✓ A firm or commissioner is about to receive your CV for a bid.

Skip it when

- ✗ You cannot yet say what you specialise in; do the positioning canvas first.
- ✗ A client's contract forbids naming the work; describe the type of work only.

WHERE IT COMES FROM

The builder draws on professional-services marketing practice and on how evaluation work is commissioned: firms search networks and rosters for key experts, and commissioners check profiles against donor-format CVs. It applies the positioning canvas to the places people look.

IN THE PLAYBOOK'S EXAMPLE

MID-TERM EVALUATION

After the mid-term evaluation of the women's livelihoods programme, the team leader's headline read only 'Independent consultant'. It became: 'Evaluation team leader | Livelihoods and women's economic empowerment | Mixed methods'. The about section opened with the problem programmes face mid-way, and featured a practice note on turning 14 questions into five, shared with the foundation's agreement. The programme director wrote a recommendation about the inception.

You have done it well if

- ☐ Your headline tells a stranger your role, niche and result in one line.
- ☐ Every featured item and named client has permission behind it.
- ☐ Your profile, CV and proposals use the same words for what you do.

Related tools

D Key-expert CV (donor format) **p. 64**

B Positioning statement and brand canvas **p. 68**

B Portfolio case study **p. 72**

B

BRAND AND NETWORK TOOL 2 OF 6 · PROFESSIONAL-SERVICES MARKETING PRACTICE

Professional profile builder

A headline, about section, featured work and keywords for your LinkedIn page and a one-page web profile.

USE IT

After you finish your positioning canvas, and after every major assignment.

TAKES ABOUT

2 hours the first time, 20 minutes a quarter

YOU NEED

Your positioning canvas, CV and consent list

Your template

Name: _____ Date: _____

1

Headline

Role + niche + result, in under 20 words. Use the words clients search for.

2

About: the problem you solve

Two or three lines, in the client's language.

3

About: how you work, and your proof

Your approach, then two or three checkable facts.

4

About: invitation

What people should contact you about, and how.

5

Featured work

Up to three items: a case study, a practice note, a talk. Only what you may share.

6

Recommendations to ask for

Two or three people who saw your work closely. Say what you would like them to mention.

7

Keywords and one-page web profile

Methods, sectors, donors' terms and languages; then reuse the text for your web page.

How to use it

1

Write the headline from the formula: role, niche, result

2

Structure the about section as problem, approach, proof, invitation

3

Check every claim against your CV and your consent list

Watch out for

A headline that is a job title only

Naming clients or showing results without their agreement

Check your draft with AI (remove names first)

Review this profile as a commissioner searching for an evaluator. Which claims are unclear or unsupported, and which keywords are missing? [profile text].

B

BRAND AND NETWORK TOOL 3 OF 6 · READ THIS FIRST

Portfolio case study

CONCEPT GUIDE

Template on p. 73

WHAT IT IS

A portfolio case study is a one-page story of one assignment, written so a future client can see how you think. It covers the context, the question the client needed answered, your approach, what changed, a client quote used with permission, and your exact role. It is anonymised by default: the organisation, people and places are described by type unless the client agrees in writing to be named. It is the honest, checkable version of 'I have done this before'.

Why it matters for your practice

- Clients want evidence that you have solved a problem like theirs; a case study shows it in one page.
- Writing it forces you to name what changed and what you cannot claim, which sharpens your next proposal.
- A well-anonymised case study respects the client, which itself builds trust.

Key principles

- 1 Anonymise first: describe organisations, people and places by type.
- 2 Lead with the change, and state the limits of what you can claim.
- 3 Name your role precisely, and credit the team and the client.
- 4 Use a quote only in the client's approved words, with the attribution they chose.
- 5 Keep the written consent with the case study, and respect what it covers.

Use it when

- ✓ An assignment has ended well and the client is willing to review a draft.
- ✓ A proposal asks for examples of similar work.
- ✓ Your profile needs featured work that shows your niche.

Skip it when

- ✗ The client has not agreed, or the work is confidential or sensitive.
- ✗ Results are not yet known; wait, or write about the approach only.

WHERE IT COMES FROM

Case studies are a long-standing format in professional-services marketing, usually following a situation, approach and result pattern. This version adds the duties set out in evaluation associations' ethical guidelines: confidentiality, consent and honest reporting of limits.

IN THE PLAYBOOK'S EXAMPLE

MEL SET-UP

The solo consultant wrote up the MEL set-up for the after-school learning NGO as 'From paper registers to a monthly reading dashboard'. The NGO appears as 'a 25-person education NGO with 40 centres'. What changed: two staff now run the dashboard alone and the board reviews it monthly. It does not claim that reading improved. The director approved the text by email for the consultant's website and proposals, with the quote attributed to 'Director, education NGO'.

You have done it well if

- ☐ Nobody could identify the client or respondents without the client's agreement.
- ☐ The change described is observable and the limits are stated.
- ☐ Written consent is on file and covers every place you will use it.

Related tools

- T** Client feedback score p. 44
- D** Informed consent script p. 56
- B** Professional profile builder p. 70

B

BRAND AND NETWORK TOOL 3 OF 6 · SITUATION, APPROACH, RESULT FORMAT

Portfolio case study

A one-page, anonymised story of one assignment: the context, the question, your approach, what changed and your role.

USE IT

Within a month of finishing an assignment, while details are fresh and the client is warm.

TAKES ABOUT

90 minutes, plus client review

YOU NEED

Your final report, the client's feedback and written consent

Your template

Name: _____ Date: _____

1 Title: the change, not the topic

A headline someone would read.

2 Context and question (anonymised)

Type and size of organisation, sector and region, with no names unless agreed; then what the client needed to know or do.

3 Approach

Two or three lines on what you did, and why.

4 What changed

Observable change, with honest limits. What you cannot claim.

5 Client quote (with written permission)

Their words, approved by them, with the attribution they chose.

6 Your role

What you did, and who else contributed.

7 Consent and anonymisation check

Who approved the text, when, and for which uses.

How to use it

- 1 Anonymise first, then write
- 2 Lead with what changed, and say what you cannot claim
- 3 Send the draft to the client and get written consent before you publish

Watch out for

Publishing before the client has agreed in writing

Claiming the whole result when you were one of a team

Check your draft with AI (remove names first)

Check this anonymised case study for anything that could identify the client or respondents, and for claims the evidence does not support: [case study].

Visibility and content plan

CONCEPT GUIDE

Template on p. 75

WHAT IT IS

A visibility and content plan sets out, for the next twelve months, how you will share what you know in four ways: publish, speak, teach and give back. Publishing means short practice notes, aea365-style blog posts, contributions to BetterEvaluation and LinkedIn posts. Speaking means association events, gLOCAL Evaluation Week and conferences. Teaching means webinars and workshops. Giving back means reviewing, mentoring and task forces. One theme from your positioning runs through the year.

Why it matters for your practice

- Being good is not enough if the people who commission evaluations never see your thinking.
- Sharing practice builds a public record of judgement that a CV cannot show.
- Giving back, through reviewing and mentoring, builds relationships and strengthens the field.

Key principles

- 1 One theme a year, taken from your positioning.
- 2 Small and steady beats big and occasional: one item per column per quarter at most.
- 3 Share learning and method, never respondents' data or a client's confidential findings.
- 4 Reuse: one practice note can become a talk, a webinar and a post.
- 5 Review each quarter what people read, who got in touch, and what to drop.

Use it when

- ✓ You have a clear positioning and want more of the right work to find you.
- ✓ You are planning the year and want visibility to fit around paid work.
- ✓ You have learning from an assignment that others could use.

Skip it when

- ✗ You are overloaded with paid work; keep one small item a quarter instead.
- ✗ You have not yet agreed with a client what you may share from their assignment.

WHERE IT COMES FROM

The Hinge Research Institute's research on 'visible experts' describes expertise made visible through writing, speaking and teaching. The routes here are evaluation associations' own programmes, such as AEA's aea365 blog, BetterEvaluation and gLOCAL Evaluation Week.

IN THE PLAYBOOK'S EXAMPLE

MID-TERM EVALUATION

After the mid-term evaluation, the team leader chose one theme for the year: making mid-term evaluations useful. Q1: a short practice note on grouping 14 questions into five, shared with the foundation's agreement. Q2: a session proposal for a regional evaluation conference. Q3: a free webinar for a national evaluation network. Q4: reviewing conference abstracts and mentoring one emerging evaluator. Each quarter took about two days.

You have done it well if

- ☐ Every item links to your one theme for the year.
- ☐ The plan fits the spare time you really have.
- ☐ Nothing in it shares client or respondent information without agreement.

Related tools

- B** Positioning statement and brand canvas **p. 68**
- B** Portfolio case study **p. 72**
- B** Event and conference plan **p. 78**

B

BRAND AND NETWORK TOOL 4 OF 6 · VISIBLE EXPERT RESEARCH AND ASSOCIATION PROGRAMMES

Visibility and content plan

Twelve months of publishing, speaking, teaching and giving back, planned one quarter at a time.

USE IT

At the start of each year, reviewed every quarter.

TAKES ABOUT

60 minutes a year, 20 minutes a quarter

YOU NEED

Your positioning canvas and a calendar of association events

Your template

Name: _____ Date: _____

Quarter	Publish	Speak	Teach	Give back
One theme for the year, from your positioning	Practice notes, blog posts such as aea365 or BetterEvaluation, LinkedIn	Association events, gLOCAL, regional and global conferences	Webinars, workshops, guest sessions	Reviewing, mentoring, task forces
Q1				
Q2				
Q3				
Q4				

Each quarter, ask: what did people read or attend? Who got in touch because of it? What will I drop?

How to use it

- 1 Pick one theme from your positioning for the year
- 2 Plan one item per column per quarter, no more
- 3 Review each quarter: what was read, who called, what to drop

Watch out for

- Planning more than you can deliver, then stopping
- Posting about everything instead of your niche

Check your draft with AI (remove names first)

Here is my 12-month visibility plan and my positioning. Is the plan realistic for someone with [days] spare days a month, and does every item support my niche? [plan].

B

BRAND AND NETWORK TOOL 5 OF 6 · READ THIS FIRST

Relationship map and networking tracker

CONCEPT GUIDE

Template on p. 77

WHAT IT IS

A relationship map is a short list of the people who matter most to your work, grouped in tiers: clients, past colleagues, firms who bid, commissioners in evaluation offices, peers and mentors. For each person the tracker notes your last contact, something useful you could give, and your next step. With it go a few habits: give first, keep a light cadence, follow up after every event, ask for warm introductions, and ask for referrals and testimonials at the right moment and in the right way.

Why it matters for your practice

- Much consulting work comes through people who already know and trust you.
- A written map stops important relationships fading while you are busy delivering.
- Giving first, without asking for anything, makes later asks feel natural rather than transactional.

Key principles

- 1 Keep it small: around 30 people you can actually stay in touch with.
- 2 Give first: an article, an introduction, feedback on a draft, an invitation.
- 3 Follow up within 48 hours of every meeting or event.
- 4 Ask for referrals and testimonials after a good result, specifically and easily declined.
- 5 Respect privacy: store only what you need, and never share contacts without consent.

Use it when

- ✓ You are setting up independently and want a steady flow of work.
- ✓ An assignment is ending and you want to keep the relationships it built.
- ✓ You have just returned from an event with new contacts.

Skip it when

- ✗ You are tempted to use it for mass messages; it is for real relationships only.
- ✗ You cannot keep personal data safe; store roles and first names only.

WHERE IT COMES FROM

The map draws on relationship marketing and on trusted-advisor practice in professional services, such as David Maister, Charles Green and Robert Galford's *The Trusted Advisor*, which describes trust as built through many small, reliable interactions over time.

IN THE PLAYBOOK'S EXAMPLE

MEL SET-UP

The solo consultant listed 30 people in six tiers. After the MEL set-up, the after-school learning NGO's director scored her 9 out of 10 and mentioned two other NGOs. The consultant asked whether the director would be comfortable making an introduction, with a short note the director could forward. One became the next client. The consultant thanked the director and later sent a useful dashboard template, asking nothing in return.

You have done it well if

- ☐ Each person has a tier, a last contact and a dated next step.
- ☐ You have something useful to offer most people on the list.
- ☐ Every referral or testimonial was asked for openly and could easily be declined.

Related tools

- T** Client feedback score p. 44
- B** Positioning statement and brand canvas p. 68
- B** Event and conference plan p. 78

B

BRAND AND NETWORK TOOL 5 OF 6 · RELATIONSHIP MARKETING AND TRUSTED-ADVISOR PRACTICE

Relationship map and networking tracker

A short list of the people who matter to your work, by tier, with what you can give each one and when you will next be in touch.

USE IT

Set it up once, then spend 30 minutes on it every fortnight.

TAKES ABOUT

90 minutes to set up

YOU NEED

Your contacts, past clients and recent event notes

Your template

Name: _____ Date: _____

Person (role)	Tier	Last contact	Something useful to give	Next step and date
A role you will recognise; keep personal data safe	Client, past colleague, firm, commissioner, peer or mentor	Date and what it was about	An article, an introduction, feedback, an event	One action, with a date

Cadence: clients and commissioners every two to three months, peers and firms every quarter, mentors twice a year. Follow up within 48 hours of every meeting.

How to use it

- 1 List people in six tiers, then keep the 30 that matter most
- 2 Note one useful thing you can give each person
- 3 Set a light cadence and follow up within 48 hours of every meeting

Watch out for

Getting in touch only when you need work

Asking for a referral before you have given anything

Check your draft with AI (remove names first)

Help me write a short, warm follow-up message to [role] after [event], offering [resource] and asking nothing in return.

Event and conference plan

CONCEPT GUIDE

Template on p. 79

WHAT IT IS

An event and conference plan is one page in three parts. Before: set two or three goals, list who you want to meet and why, and submit a session, poster or panel if you can. During: have real conversations rather than pitches, and write notes the same day. After: follow up within 48 hours and share what you learned. It works for a local association meeting, gLOCAL Evaluation Week, Asian Evaluation Week, EvalFest of the Evaluation Community of India, or the European Evaluation Society and AEA conferences.

Why it matters for your practice

- Conferences take days and often money; a plan makes that time count.
- Presenting, even briefly, makes you known for a topic far more than attending.
- Most of the value comes after the event, in follow-up that most people never do.

Key principles

- 1 Set goals for learning and relationships, not for sales.
- 2 Prepare questions, not a pitch.
- 3 Write notes the same day, while you can still remember who said what.
- 4 Follow up within 48 hours, with something useful and specific.
- 5 Share what you learned, crediting speakers accurately.

Use it when

- ✓ You have registered for, or are considering, an event.
- ✓ A call for sessions opens in your niche.
- ✓ You want to meet commissioners, firms or peers in a new region.

Skip it when

- ✗ The event has nothing to do with your niche or your learning goals.
- ✗ You cannot afford the time; follow the recordings and write to one speaker instead.

WHERE IT COMES FROM

The plan draws on how evaluation associations run their conferences, with open calls for sessions and volunteer roles, and on the follow-up habits taught in professional-services business development.

IN THE PLAYBOOK'S EXAMPLE

MID-TERM EVALUATION

Before a regional evaluation conference, the team leader set three goals: learn how others group evaluation questions, meet two commissioners from evaluation offices, and test the practice note as a short session. During the conference, the notes recorded who said what. Within 48 hours, each new contact received a message with one useful link. A short post shared three lessons and credited the speakers by name.

You have done it well if

- ☐ You arrived with goals, names and questions.
- ☐ Every new contact had a follow-up within 48 hours.
- ☐ You shared your learning and added people to your relationship map.

Related tools

- B** Professional profile builder **p. 70**
- B** Visibility and content plan **p. 74**
- B** Relationship map and networking tracker **p. 76**

B

BRAND AND NETWORK TOOL 6 OF 6 · PROFESSIONAL ASSOCIATION CONFERENCE PRACTICE

Event and conference plan

A one-page plan for before, during and after an event, so a conference turns into relationships and learning.

USE IT

Four to eight weeks before an event, or when a call for sessions opens.

TAKES ABOUT

45 minutes before, 30 minutes after

YOU NEED

The programme, the speaker list and your positioning

Your template

Name: _____ Date: _____

When	Step	Your plan	Done
		Specific names, sessions and dates	Tick
Before	Three goals for the event		
Before	Five people or groups to meet, and why		
Before	Session, poster or panel to submit		
During	Sessions to attend and questions to ask		
During	Conversations and same-day notes		
After	Follow up within 48 hours		
After	Share what you learned		

Within a week: add new contacts to your relationship map, and note one idea for your visibility plan.

How to use it

- 1 Before: set goals, list who to meet and submit a session if you can
- 2 During: have conversations, not pitches, and take notes the same day
- 3 After: follow up within 48 hours and share what you learned

Watch out for

- Pitching your services in every conversation
- Waiting a week to follow up

Check your draft with AI (remove names first)

I am attending [event]. My niche is [niche]. Suggest three realistic goals and five questions I could ask people working on [theme].

Notes

Lessons from your last assignment, phrases that worked with clients, or changes you want to make to these templates.

From Zero to World-Class

The Monitoring & Evaluation Consulting Toolkit

The full book behind this pack. Every tool and document opens as a two-page spread: a concept guide on the left and a template on the right, grouped by the seven CONSULT stages, with a quick-start hour, worked examples and key terms around them.

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CONCEPT GUIDES

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PART 1

21 tools

Three tools for each of the seven stages, from deciding whether to bid to tracking how findings are used.

PART 2

9 documents

The documents every consultant writes, from the technical proposal to the key-expert CV.

PART 3

6 brand and network tools

Positioning, profile, case study, visibility plan, relationships and events, with an honest-brand guide.

Also inside

- A before-and-after ToR spread: seven risky clauses become written agreements
- Two worked examples that run through every concept guide
- Key terms in plain words, and a guide to ethics and AI use
- A first hour: three tools you can use today
- The CONSULT method at a glance, with a page reference for every tool
- Notes pages, and a clean A4 layout for double-sided printing



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