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The L&D Consultant's Project Life Cycle

Amanda Van Der Heiden

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What is the best way to have internal and external teams work together on L&D initiatives? The number of contractors and consultants will likely rise in the future—and when a project involves different knowledge levels, ethnic or workplace cultures, skill sets, roles, and types of people, it can be challenging to work toward one common goal. Insight into the consulting project life cycle and others' perspectives can make a significant impression on everyone involved.

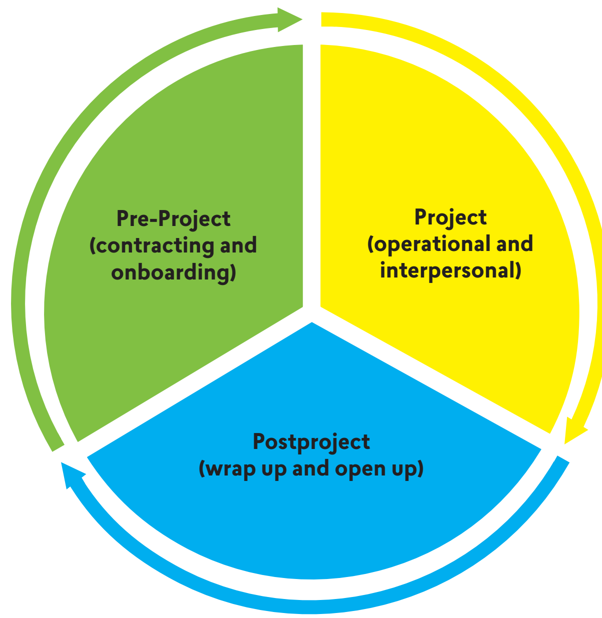
Whether you are responsible for managing an L&D consultant or you are the person on assignment, that insight can help you appreciate what other L&D professionals need from you and the information you can provide. The surest path to success is to understand what to expect before, during, and after a consulting engagement. If you are on the organization side, managing the L&D consultant, you must manage a significant financial commitment, the company's external reputation, and the overwhelming need to make your stakeholders happy. As the consultant on assignment, you must put your reputation and potential future earnings on the line while delivering the best results possible.

Effective collaboration between the L&D manager and the consultant boosts morale within the larger project team. However, to realize the benefits of such a relationship, it's imperative for companies to avoid the potential pitfalls that can come with a contracting engagement, such as ensuring internal employees work well with the contractor, equipping the L&D manager with the skills and resources to best manage the contractors, and informing leaders about the return on investment of effective vendor relationships.

In this issue of *TD at Work*, I will:

- Discuss the Global Talent Development Solutions (GTDS) Consulting Life Cycle model.
- Review components of pre-project, project, and postproject phases.
- Examine the manager and consultant perspectives for each element of the L&D project vendor relationship.
- Pose questions and considerations for each phase of the project.
- Offer advice based on previous experience.

The Global Talent Development Solutions Consulting Life Cycle



Path to Success

For any L&D project involving an external consultant, the life cycle is divided into three distinct stages—pre-project, project, and postproject—which constitute the GTDS model. I will explain the model first from the organization's perspective and then from the consultant's perspective.

L&D Manager Overview

You may be looking to leverage external talent due to a lack of internal skill sets, bandwidth, or time. Before you jump into onboarding, identify success benchmarks.

Pre-project. What do you need to consider before bringing on an external expert? You have a project you need immediate assistance with, but rushing past this step can be disastrous and inadvertently undermine what you want to accomplish.

Project. Does the consultant have everything they need to be effective and efficient on their first day? If not, it could be costly in terms of both time and money.

Postproject. How did the engagement go? When you reflect on the past, you are more likely to have a successful future.

Consultant Overview

What type of engagement works best with your skills, talents, and preferences?

Pre-project. Understand your ideal client and the types of projects you want to work on. Which clients do you prefer to service? Where is your expertise best utilized? Are you prepared to say yes to whatever the client asks, or do you plan to set specific boundaries on what you will and will not do for that client? If you are coming in through an agency, how does that affect the client relationship? How much autonomy do you currently have, and how much do you want to have?

Project. Do you recognize what "good" looks like? Did the company properly scope the project, and do you have the necessary information and resources to accomplish the goal at hand? How else can you be a good partner to your client? Are you able to provide excellent service and consistent results? No matter the assignment, communication is essential.

Postproject. Evaluating the results is crucial. What went well? What can you improve? Think about it from multiple perspectives. How can you leverage this assignment or client to create opportunities in the future?

Whether you are the internal L&D manager or the external consultant, methodically approaching each phase of the project life cycle will result in a higher rate of success for everyone.

Phase 1: Pre-Project

The pre-project phase, comprised of contracting and onboarding, is the time to be strategic, clearly defining what you are trying to accomplish and mapping out a path to success.

Contracting

Contracting typically consists of agreements that detail a project's who, what, where, when, why, and how. Here are some details that people often overlook.

Right people, right seats

Think through all an L&D project's components—not just the necessary roles (such as instructional designer, project manager, learning management system administrator, or facilitator) or skills (such as data analytics or facilitation) that help bring the initiative to life, but also team personality and communication levels.

Manager: You should not select someone dry and introverted to facilitate a group of high-energy salespeople. Don't ask your project manager, who can create slide decks, to design intricate and complex graphics. Even if an employee can accomplish a task, does it make sense for that person to do that work?

Take into consideration what people excel at and what they love to do. Listen closely when people tell you what they are good at, and believe them. If someone enjoys leading meetings, leverage that strength and excitement. Asking people to do things they are not as skilled at doing drains their energy and your budget.

Consultant: Be honest about what your strengths are and help organizations to effectively use your talents. Consider the adage "If you say 'yes' to this, what are you saying 'no' to?". Are you the correct person for a particular job?

Budget

What is the expected budget for the project and timeline?

Manager: Do you have the budget for what you are trying to accomplish? The answer to that question will determine how many resources you can afford, what type of vendor you connect with, and the timelines for success.

Confession Time

As an L&D practitioner, are you guilty of taking on too much responsibility? As someone with high accountability, I have struggled throughout my career with scope creep and setting boundaries. Here are a few examples:

- I was a relationship manager for a client and did not think the course materials were good enough—with regard to grammar, language choice, and spelling—so I edited and rephrased content (such as from Dutch-English or Spanish-English into English).
- I was a project manager responsible for managing facilitators. A facilitator got caught in traffic, so I jumped into the classroom to cover a course for which I wasn't formally trained.
- I was a program manager responsible for managing learning consultants. While attending a train-the-trainer program, the microphones stopped functioning, so I walked onto the stage and improvised a talk until event staff fixed the technology. The audience never realized it was not a planned portion of the day.

While I love saving the day, there are many things I could have done to redirect those tasks to the appropriate people. How can we build strong processes as internal learning managers and boundaries as consultants to ensure the right person is working on the tasks for which they are best suited?

A lower budget does not have to mean poor quality; it simply means you must get creative, be clear about the end goal, and efficiently use every dollar. A higher budget does not always translate to better quality or graphics. If you do not have an adequate budget (or any budget at all), determine whether the project can translate to a stretch assignment for an existing team member (provided they have the skill set and the interest).

Consultant: Know your worth and hold firm. Discounting your rates can cause you to feel devalued, which can lead to burnout. You may find yourself putting in less effort, which can affect quality and, inevitably, your reputation. Conversely, if you are uncomfortable with how high your rate is, you may develop impostor syndrome and begin overworking to prove your worth.

Decision-making process

Nailing down the project is a process with considerations for both the internal team and the external consultant.

Manager: How long do you expect the request-for-proposal process to take? Which skills and companies are you focusing on and why? How many vendors or consultants do you want to meet with before deciding? Prioritize transparency, effective communication, and consistent guidelines. Clearly define what you are trying to accomplish from start to finish.

Make a list of questions to ask each vendor in the same order to create a comparative process. Otherwise, you may make an emotional, subjective decision instead of a rational, objective selection (such as whether you have a great conversation with a vendor whose qualifications are not as extensive as a more introverted vendor).

Consultant: Consider the project objectively. (What are the tradeoffs between this potential project and other prospective work?) To be the best partner possible, come prepared to ask questions and confirm that the organization can clearly define the project and vision for success.

Expectations

The more specific you can be about the project and your needs, the more likely you are to be successful.

Manager: Include preferred communication styles, delivery methods, and how involved stakeholders wish to be as well as timelines, results, and the overall vision. Map it out or ask for help. Can you articulate what success looks like? If you are leveraging a consultant or vendor because you are not an expert, ask them to provide you with some options and highlight their expertise.

Consultant: If the manager doesn't share their expectations, you must ask. Do you clearly understand whether you hit the client's target? Does the client seem knowledgeable about the project's result? Do you need to educate them on what it will take to make their vision a reality? What do you provide, and where will you need their assistance?

Scope

As learning professionals, we thrive on helping. Therefore, it can often be difficult to set boundaries and stick to them; professionally, however, that is required of us.

Manager: Draw a line regarding what is inside versus outside of the project's scope. You can always re-evaluate or create a 2.0 version for future enhancements or spinoff projects. Build in contingencies; if challenges occur, state the priority, and document the escalation process.

Consultant: When in the middle of large projects, you may identify problems that affect the project's goals or additional work that influences the results. Manage scope creep by bringing changes and add-ons to the attention of key stakeholders so they comprehend the situation and can advise the best step forward. Before you begin the project, define what you expect the project to accomplish and determine how to address changes. To whom should you escalate a concern? How should you prioritize potential challenges? When does the project officially end?

Onboarding

The L&D team has selected a vendor or consultant to bring the deliverable to life. Although that is an exciting achievement, cover all your bases before starting the project.

Internal requirements

Each organization has different requirements for agreements and stakeholders when bringing on a consultant.

Manager: Who at your company should be involved (such as the procurement team, technology team, security team, or travel department)? What information do consultants need to be successful? Is it the same process for one person as it would be for a team of 20 coming on at the same time? Is there a holiday or conference coming up that affects standard timelines? Learn to effectively work with the people and departments within your organization before looking externally.

Consultant: Make note of observed holidays or conferences as well as typical timelines, departments involved,

Case Study: Scope Creep

My specialty is project and program management for L&D initiatives. Often, teams complete the project scope and select other vendors before I am assigned.

For context, a typical content development cycle usually has four stages to the creation review process.

1. Alpha. The client submits original source materials or outline to the vendor; the vendor creates and designs content, and then sends materials to the client for review. The client then sends back edits, requests, or comments.
2. Beta. The vendor works on the client's notes, makes changes (including design and picture elements), and then returns content to the client for review and feedback.
3. Gold. The vendor completes any additional changes, completes the end materials, and submits them to the client in whatever format the client desires.
4. Final. The client gives approval and the course is ready.

This case study details a project where the scope changed after both parties signed the contract.

Situation: A client reached out six weeks prior to an on-site training event for 400 people. The team advised me that it had mostly completed materials, but the items needed some enhancement and readjustment. In this case, the client originally told the vendor that it only needed alpha and gold stages, meaning one round of changes would be enough prior to approval. The client also believed it only needed four L&D consultants—a project manager (me), a developer (to enhance the content), a designer (to add graphics and bring the courses to life), and a quality associate (to proofread and finalize content)—because it had completed 75 percent of the project before scoping the project.

Approach: Based on the aggressive timeline and assignment details, I created a project plan to frontload the work into the alpha version, meaning the vendor would need to submit both content and graphics within that stage so the client could provide feedback and approve at the next round.

Unfortunately, the client failed to realize that the content was in worse shape than expected. In addition, the client did not provide examples of the exercises or activities it wanted. Another added complication was that, when the client provided the due date, it mistakenly listed the event on-site arrival date—forgetting that it needed materials for the train-the-trainer program the week prior to arrival as well as the need for the legal department to approve the course a week before the trainers received the materials.

So, a project that started with materials "mostly completed" and due in six weeks became a project that needed major changes to the content, curation of new models, and completely new exercises—all due in just over three weeks, rather than the original six-week timeframe.

Outcome: Everyone involved worked around the clock until the first participants arrived on-site. The project team completed five rounds of reviews, added consultants, completed a draft version of train-the-trainer materials instead of the final, and the legal team changed its week-out deadline to a next-day deadline—tripling the initial scoped budget.

Takeaway: Scoping properly is critical from both the client's and consultant's side. If either team misses a detail in the scoping phase (or if the scope of the project changes entirely), something must give—whether that is time, quality, or cost.

In this case, cost significantly increased because sacrificing quality was not an option and time changes were an impossibility because the company had already scheduled 400 people to travel to the event.

team priorities, and any other elements that affect a successful start. How much work has the team or company completed prior to retaining your services? Do you have a grasp of whom to ask for necessary information?

Access to systems and documents

Whether the company has older or updated systems, you will encounter access and proprietary questions.

Manager: Are you formally bringing the consultant into the company's systems? Depending on security infrastructure levels, that may involve compliance training, setting up email addresses, and sharing tools. If you do not bring them onto your side of the firewall, how will they access and send important or sensitive files? What logins, credentials, and equipment will they need to achieve project goals? The ability to communicate can make or break a project. Your decision on this matter will affect the entire relationship, so choose wisely.

Consultant: Are you capable of adhering to the client's needs? Can you provide them with any safe and easy alternatives? Take this step seriously because it will influence your day-to-day communications, project outcomes, and, thus, your reputation.

Spell it out

Whether you realize it or not, every company and each person has their own shorthand, abbreviations, and meanings.

Manager: Check whether a cheat sheet of common phrases, acronyms, and abbreviations already exists for newcomers and consultants so your consultant can hit the ground running. If one does not exist, create one. Consider including organizational charts and contact sheets. Further, ask the consultant to call out when a team member uses an abbreviation, and track the terms to add to your glossary.

The more information you can provide to a consultant at the beginning, the more likely they are to be efficient, effective, and successful.

Consultant: Research and learn common industry vernacular before the project begins. Don't assume you know the abbreviations the company is using. Even in the same industry, different organizations use the same initials to mean different things.

Full-time employee or outsider

Self-awareness is important.

Manager: How do you best work with new team members? Does your company define consultants as a full team member with specialized expertise that seamlessly integrates into your organization? Or, instead, does the business view consultants as outsiders who do their part but do not receive the same level of communication or credit as internal employees?

Consult with the correct department on co-employment law. Ask questions, such as:

- May the consultant have an internal email address?
- If so, should they include their consultant status in the email signature?
- May they attend team meetings?
- May they initiate or attend meetings without stakeholders present?
- If the company or team wins an award based on consultant work, will it notify or recognize that consultant?

Case Study: Confirmation Is Key

One of my clients had a size barrier to emailing files. In addition, if an email bounced, the client's system did not generate a bounce-back or error message. It took many heated conversations with language such as "I sent that" and "I didn't get that" before we realized the issue.

As a result, I created an extra step in the process that required the client to explicitly confirm receipt of materials in a separate email.

Note that I do not usually recommend manual processes because they are subject to human error and you don't want anything to fall through the cracks. It is also time consuming, so remember that with external consultants, time is money.

Case Study: Who Is Included?

Different industries have unique requirements when bringing new people into a firm.

Situation: Two large companies were merging. To do that successfully, one company needed to train 10,000 employees on a new system in one year. To help meet the deadline, the original company decided to bring on 500 contract trainers. The legal, procurement, finance, and training departments had been discussing the new consultants for months but did not notify the consultant management office.

The CMO was a team of four people. The typical timeline to bring on one consultant was about a week, enabling the new person to receive approval, complete a security check, obtain a badge, and collect equipment. The onboarding process involved manual data entry, and the CMO team handled approximately 50 to 200 requests per day.

After legal and finance officially approved the outside consultants, they submitted a 500-person request to the CMO team without warning, and the requestor expected the standard, one-week turnaround.

Approach: The small CMO team worked nonstop to accommodate the request in addition to its usual workload.

Outcome: The lack of notification and rushed timelines created major divides between multiple groups. The training project kickoff was delayed by almost two months, creating compliance concerns, budget issues, and employee burnout.

Takeaway: Always ask the question "Who am I missing?" to ensure you have identified all the people and groups that will be affected when bringing in consultants.

Consultant: Do you have a preference for staying external or being integrated into a team? Do you enjoy working on multiple projects at once, retaining your own office and schedule? Will the client expect you to maintain a set schedule?

Ascertain what information and access you require to complete the project. Identifying client restrictions will help you be more successful. If you feel left out, you likely did not properly set expectations.

Missing the mark

When new to a team, company, and project, consultants occasionally ask questions that seem unhelpful.

Manager: If you're bringing on a consultant, create a welcoming atmosphere and keep a curious but respectful tone. What resources have you given to them? Why are they asking a particular question? Could it be that you are not explaining things well? Or are explanations or job aids inaccessible?

Empathy and openness to clarify will affect your relationship as well as the project results.

Consultant: Direct your questions at the appropriate time and place to the appropriate person. Do you need to ask the question and obtain an answer right now? Have you reviewed all materials prior to asking the question? Is your question applicable to everyone on the call, or will it derail the current conversation? Is it possible to pull someone aside and ask? Knowing when to ask and how to ask is a skill. Be thoughtful and strategic about how you strive to obtain information.

Phase 2: Project

The project phase (broken into two parts, operational and interpersonal) is one of active engagement.

Operational

If you complete the pre-project phase, the beginning part of the project is easy to implement. You have a clear vision, proper expectations in place, and an understanding of the communication template, timelines, and preferences. Ideally, you also have a road map to success, and all parties, both internal and external, are clear on project roles.

Manager: Even if you outsource a project to a consultant or vendor, you are still responsible for making it a success. Good leadership practices, such as gratitude, compassion, communication, self-awareness, respect, and modeling, aren't just buzzwords. As the leader, you determine the success of your team and influence your consultants.

Case Study: Clarity Is Critical

I worked with a client that had a full team of six developers and four designers. The developers curated content, wrote courses, and created activities. The designers provided graphics, animation, and visual effects. When I began the project, the client gave me a welcome sheet with staff names, emails, phone numbers, and titles. The only problem? All 10 individuals' job titles were "instructional designer." Whom should I go to for details versus visuals on a course?

Even worse, because the two teams were separate, the client would create meetings on my calendar that said, "Meet with ID team at noon. Please come prepared to discuss the latest versions of the project." With limited time to review between meetings, it was unclear whether I should read the course for content or review it for design. Even internally, company employees weren't sure which group provided what services.

Eventually, I learned people's names and their roles. So, I knew if Jim scheduled the meeting, it was about course details; if Shantel scheduled the meeting, it was about course graphics. For clarity, my advice is to clearly define roles, use individuals' names, and spell out terms rather than using abbreviations.

Consultant: Projects get complicated when you have multiple bosses such as clients, stakeholders, and vendors. Do you understand whom you report to, what is appropriate to share, and when to share it?

For example: As a consultant, I sign nondisclosure agreements. Sometimes, I am not permitted to share sensitive information with the person signing my paycheck. I take confidentiality seriously and have refused to provide client documents unless approved to do so.

To avoid losing standing with your client, address confidentiality issues from the start and choose companies and clients that understand your process. Here are some operational details to remember:

- **Overview.** Does everyone have access to all the details for the project?
- **Expectations.** Is there a clear vision of the end result?
- **Communication plans.** How frequently will you attend meetings? What is the timeline for sharing information?
- **Reporting preferences.** What data or content are you reporting on, when, and to whom?
- **Complex rollout hierarchy.** Who knows what, when, and in what order? What is the escalation process?
- **Controls in place.** How can you find and address problems before they become major issues?
- **Team roles.** Does everyone know the individuals on the team, their roles, and what they need to be successful?
- **Number of team members.** A project can have too few or too many cooks in the kitchen—the number of people involved, informed, and who need to approve the work affects the entire project life cycle.
- **Amount of content.** Too much information, when it's extraneous to the project, is just as bad as too little information.
- **Context.** Understanding the project's origin and the need it is trying to fulfill will influence the result.
- **Culture.** Knowing the environment is vital to ensuring the project's effectiveness.

Interpersonal

The people involved significantly affect a project.

Manager: Consultants are not mind readers; you bring them on to do work and support your team, but they also need support. What resources are available to them? Who could be helpful if they run into an issue or have a question?

Collaborate with, rather than isolate, your consultants. Just like you, they cannot be as effective in silos. Provide specific, actionable feedback as frequently as possible.

Meet people where they are and identify what is unique to them as an individual. Know that building strong relationships takes work. When you have an active project in the works, remember that strong leadership is critical.

Take a consultant's perspective, including these thoughts, into consideration:

- While consultants are looking for direction from you, as it is your project they are helping to create, it may be important for them to manage up.

- They need to feel empowered to speak up just like other members of your team.
- Consultants don't want to be paid to do nothing. They want to be helpful to and successful for you.
- Toxic behavior has a trickle-down effect; people act the way they do for a reason. Some internal employees may think they can get away with bad behavior because a consultant is temporary. Make sure your team members treat each other, internally and externally, with respect.

Consultant: Due to co-employment laws, the company may not refer to you as an employee, and your client may require you to follow different rules than the internal team.

Keep these interpersonal aspects of a project in mind:

- Don't assume—articulate your needs, wants, and preferences.
- Practice self-efficacy. Ensure people have what they need to be successful.
- Offer and accept support to get the best results.
- People are not machines, and treating them as such can create major issues. Set boundaries where you need them.
- Building trust with a team takes time, whether you are internal or external; try to spend face-to-face time with the team. If it's not possible to be on-site, use cameras during meetings to build a bond.
- Ask for guidance regarding cross-functional cooperation. How people and departments interact with each other is the difference between a successful project and a failed one.
- Seek to understand what motivates people on the team.
- Identify and address issues when they occur as quickly as possible. Find and resolve the source not just the symptom.

Phase 3: Postproject

When you have finally achieved your goal—whether it was a sprint assignment or an ongoing program, whether you successfully managed a consultant or gained valuable new experience with a client—you still need to set yourself up for success in the future with two postproject components: wrap up and open up.

Wrap Up

It can be tempting to finish one initiative and jump headfirst into the next one. However, even if you think the entire team had the same experience, take the time to have a debrief meeting and honor the time and effort everyone put into making the project a success. When you have a wrap-up meeting, you can learn from mistakes, document lessons learned, identify what you will do differently next time, and determine what to avoid.

Offer and accept support to get the best results.

Debrief

What happened during the project? Different people have different vantage points.

Manager: Ask everyone to participate in the evaluation process, including major stakeholders and the consultant.

Consultant: Don't presuppose everyone knows all the various people you worked with or every piece of the project to which you contributed. Articulate all the effort on your end.

Evaluate

What went well, what did not go well, and what can you change in the future? Was the project a success?

Manager: Do you have a standard review process? Do you typically send out surveys? How long does it take to pull all the results together prior to determining the project's outcome?

Consultant: Are you open to feedback? How will you change your process based on the results?

Acknowledge

To close on a positive note, thank everyone involved for their time and dedication.

Manager: Yes, you paid your consultants, but keep in mind that gratitude and appreciation go a long way.

Consultant: Yes, you gave it your all, but thank the company (and specifically your manager) for the opportunity to work with them as well as all the people who supported you during your time on the project.

> **When you have a wrap-up meeting, you can learn from mistakes.**

Open Up

Set up for the future with these additional postproject steps.

Keep in touch

Follow legally agreed-upon ways of keeping in touch, such as via LinkedIn or email.

Manager: Review your contracts to ensure compliance.

Consultant: Check in once in a while, if permitted.

Champion

Support each other's work.

Manager: You may not necessarily have more work for the consultant, but you may have other needs down the line. If a vendor accomplished the promised scope of work and you know of a different team, colleague, or company that could benefit from their expertise, connect them. When appropriate, recommend them in a private or public message.

In addition, leverage past vendors and consultants when starting new projects to save training time.

Consultant: You may not have the skills for the next project a team or company is building, but that doesn't mean you won't down the road. Pass along potential opportunities with companies with which you have worked to other consultants who may be a good fit.

Conclusion

When you strategically and systematically use the GTDS model and document your processes, you will foster deeper relationships, gain better results, and ultimately, be more efficient and effective within your budget. Every person involved has the power to make an engagement successful.

Remember, each phase is a critical part of the overall success of the L&D initiative. When both the L&D manager and consultant thoughtfully map out the pre-project phase, you set expectations and begin the project phase ready for action. By planning properly and implementing expertly in the project phase, you can accomplish great things together. Finally, by following postproject protocols, you simultaneously help set the tone for future projects and ensure higher operation levels the next time. Use this framework in your next L&D project to achieve the best results through collaboration and positive relationships.

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Statement of Ownership

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L&D Contractor-Client Template

Use this template to scope a new L&D project or solve for training and development challenges.

Setup

Brief description of the learning request (e.g., goals, business, initiative, problems to solve):

Why is the training solution needed?

Training start date:

Training end date:

Other timelines to consider:

Whom will you train (e.g., total number, location, selection criteria, tenure with company)?

If the program will be ongoing, how often will employees need to take this course? Or, at what point in their tenure should they take the course?

How will you market the program?

Has the team completed a needs analysis or other benchmarking?

L&D Contractor-Client Template (Cont.)

Modality and rationale

In the past, how has your company delivered training (e.g., instructor-led training, virtual instructor-led training, asynchronous e-learning, or blended training; coaching or mentoring; job aids)?

What is the rationale for using that modality?

Does the client want to change training methods? If so, what is the rationale for doing so?

What internal learning tools does the company already use (e.g., learning management systems, platforms, vendors)?

Measuring success

How will you measure the effectiveness of this deployment?

Do you have internal assessments, or can you use program-specific forms?

How do you report return on investment statistics in your organization (e.g., steering committees, annual reports)?

L&D department-vendor partnership

How will you approve deployment (for instance, will approval need to go through legal or through senior managers)?

Who are the key players (e.g., stakeholders, approvers, champions, L&D team members)?

L&D Contractor-Client Template (Cont.)

What is the intended cadence of check-in meetings (e.g., weekly versus milestone based)?

Will you need additional services (e.g., L&D strategist, project manager, administrator)?

Is there additional information on how to best partner with you to accomplish your goals?

Contract

Budget range:

Finalized budget due date:

Contract proposal due date:

Approval process and terms:

Payment process and terms:

Frequency and requested type of reporting (e.g., monthly, quarterly, annually, ad hoc):

Notes

Onboarding an L&D Consultant To-Do List

Internal L&D managers can use this list to kick-start their project and their relationship with a consultant.

Prior to consultant start date

- ❑ Complete the contracting phase.
- ❑ Define the people and vendors involved in the project.
- ❑ Create a budget.
- ❑ Develop the decision-making process.
- ❑ Set expectations.
- ❑ Decide the scope of the project.

Communication is key. Be sure to confirm:

- ❑ First day start time
- ❑ Location
- ❑ Attire
- ❑ Any additional information the consultant will need
- ❑ Desk or office assignment
- ❑ What technology or tools they will need

Prepare other employees and vendors:

- ❑ Notify them of the new consultant's start date.
- ❑ Ask for their participation in onboarding the consultant.
- ❑ Confirm what steps they need to take and whether they are on track for the start date.

Consultant start date

Have a welcome packet prepared for the consultant that includes:

- ❑ A welcome from the company (or team or project)
- ❑ A cheat sheet of contacts and company abbreviations
- ❑ Setup and login information for technology or tools and whom to contact in case of a problem
- ❑ Additional tools, tips, and information that assist the contractor with acclimation (such as a map of the building, the time zones in which different employees reside, project background information, or culture guides)
- ❑ Onboarding plan (including projects, tasks, milestones, deadlines, and planned check-in meetings)

Notes

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