Unit 390 Consulting Skills

Level: 3

Credit value: 8

QCA Reference: Y/502/1116

Purpose and aim of unit

Rationale

The aim of this unit is to enable candidates to identify the key characteristics, techniques and methods associated with successful consulting skills. To practice those skills whilst engaging with internal or external clients in all stages of the consulting cycle to bring about change in an organisation.

Outcomes
There are six outcomes to this unit. The candidate will be able to

- understand the role that the consultant plays in helping to bring about technology driven organisational change
- structure a client assignment and specify the key management deliverables involved
- capture, document and present back the functional requirements of business users
- agree and document the manner in which the success of an assignment will be judged
- use standard techniques to plan and control the work involved in producing the products associated with a consulting assignment
- manage the client during an assignment and develop an appreciation of the challenges faced when dealing with difficult clients.

Guided learning hours

The recommended guided learning hours for this unit are 60 hours.

Connections with other awards

NVQ links	Outcome	This award contributes to the knowledge and understanding of the following Areas of Occupational Competence for the City & Guilds NVQ for IT Professionals (4324)
305		Interpersonal and written communication 3
306		Investigating and defining requirements 3
308		Quality management of ICT products and services 3

Key Skills links

Communication	C3.1a, C3.1b, C3.2, C3.3
Application of Number	N2.1, N2.2, N2.3
Information technology	ICT1.1, ICT1.2, ICT1.3
Working with others	WO3.1, WO3.2, WO3.3
Improving own learning	LP3.1, LP3.2
Problem solving	PS3.1

Assessment

Assessment will be by means of a set assignment covering practical activities and underpinning knowledge

Outcome 1: Understand the role that the consultant plays in helping to bring about technology driven organisational change.

Practical activities

The candidate will be able to:

1. identify the process by which change projects are initiated, managed and delivered in an organisations

2. identify how key business functions in an organisation determine IT needs
3. select ways in which key business functions interact with IT providers to deliver the required services.
   - operations
   - finance
   - human resources
   - sales and marketing

3. identify the types of behaviours influencing, rapport building, facilitating requirements definition
4. select and use the most appropriate communication style in a given situation.
5. select appropriate techniques to meet the differing needs of various user groups

Underpinning knowledge
The candidate must be able to:
- describe the difference between 'expert consulting' and 'process consulting'
- describe a process for initiating and approving IT projects to fulfil business requirements
- list the key factors that need to be considered when specifying a requirement for support for a business process – business outcome, business metrics, costs and benefits, user acceptance criteria
- list the key components of a business justification for an IT system - business outcome, business metrics, costs and benefits, user acceptance criteria
- list the key techniques that can be used to identify user requirements – process flow diagrams, data modelling, testing criteria
- list the key characteristics of a trust based client relationship – openness, transparency

Outcome 2: Structure a client assignment and specify the key management deliverables involved

Practical activities

The candidate will be able to
- use a consulting cycle to structure a client assignment to deliver an IT system
- produce and agree a statement of work for the assignment – business outcomes, products to be delivered
- construct an outline plan of work for the assignment
- negotiate, agree and document quality acceptance criteria for the conduct of the assignment
- identify key stakeholders and actions to engage them

Underpinning knowledge
The candidate will be able to
- describe the key phases in a consulting cycle e.g.
  - entry and contracting
  - requirements definition
  - feedback and decision to act
  - implementation
  - extension or termination
- list the major management deliverables of each phase of the cycle – statement of work, contract, business case and project initiation document, progress reports, risks and issues reports, user acceptance and follow-on actions, post implementation review, contract closure
- indicate the essential roles that need to be in place to ensure that a consulting assignment is managed successfully – sponsor, steering board, key user
- list the mandatory elements of a statement of work and describe the purpose of each – business objectives, acceptance criteria, budget, constraints, risks, timescales, costs and benefits
- illustrate the key components of an outline plan of work for a simple scenario – product breakdown, schedule, budget
- explain how products and processes are quality assured during an assignment
- explain the techniques used to manage stakeholders

Outcome 3: Capture, document and present back the functional requirements of business users

Practical Activities

The candidate will be able to
- construct a set of outcome focused objectives for a given IT system
- draw a process flow diagram for a business problem
- present a process flow diagram to an audience
- capture key performance metrics that must be achieved by the new business process
- define a set of user acceptance criteria for the products and services to be delivered

Underpinning knowledge
The candidate must be able to
- identify what is meant by an outcome focused business objective
- define the characteristics of a good objective
    - specific
    - measurable
    - achievable
    - relevant
    - time-based
- explain an iterative technique that uses flow diagramming to build consensus about the characteristics of a business process
- describe how process performance metrics are derived

Outcome 4: Agree and document the manner in which the success of an assignment will be judged.

Practical activities

The candidate will be able to
- construct a set of acceptance criteria for an assignment
- select quality procedures appropriate for the type of work to be conducted
- identify the costs and the benefits associated with a given scenario
- construct a business case for the new IT system
- build a benefits realisation plan for the deployment of a new IT system

Underpinning knowledge

The candidate will be able to:
- explain the differences between quality assurance and quality control
- list the components of a quality assurance plan for a consulting assignment
- define the categories of costs associated with the delivery of an IT System
- describe the categories of business benefits that can be achieved through the deployment of an IT system
- explain which sorts of benefits might reasonably be achieved soon after the deployment of a new system
- list the actions that can be put in place to ensure the realisation of longer term business benefits
- list the components of a business case

Outcome 5:   Use standard techniques to plan and control the work involved in producing the products associated with a consulting assignment.

Practical activities

The candidate will be able to
- construct a product breakdown structure for an assignment
- decompose a product breakdown structure to produce a list of tasks that must be performed
- identify the critical dependencies between tasks
- formulate a schedule of work from a list of tasks and an understanding of the dependencies between those tasks
- prioritise work to achieve agreed delivery schedules

Underpinning knowledge

The candidate will be able to:
- define the various types of products that are produced as part of an assignment
     - technical products (the deliverables associated with functionality)
     - management products (associated with initiation, control and closure of the assignment)
     - quality products (associated with the management of the actual work)
- explain the principles of constructing product breakdown structures
- explain how to convert a product breakdown structure into a task list
- explain how to calculate the critical path for a project

Outcome 6: Manage the client during an assignment and develop an appreciation of the challenges faced when dealing with difficult clients

Practical activities

The candidate will be able to
- communicate concisely the proposed method of achieving the required business solution
- negotiate with the client the phasing of deliverables to enable the early achievement of business benefit
- agree the nature, frequency and content of progress reporting to build client confidence and reduce potential risk and exposure
- agree the tolerances within which the consultant can operate without need for escalation to higher decision making
- apply appropriate questioning techniques at different stages of the assignment to elicit information whilst building rapport
- match communication style to the purpose at hand when communicating:
    o progress
    o success
    o risk
    o bad news

Underpinning knowledge

The candidate will be able to:
- explain how to divide an assignment into smaller stages in order to produce early business benefit
- define the key elements of a good progress reporting scheme:
    o functionality delivered and being used
    o work planned that is completed or in hand
    o work planned that has not been started and why
    o new risks identified, existing risks that have been managed or eliminated
    o functionality that will be delivered in the next period
    o support needed to overcome identified challenges.
- define the conditions under which to seek guidance and when to escalate matters for decision making