

Consultancy and Professional Services Procurement Training Course

8 – 12 March 2027
San Diego

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Ref: 2093_253345 **Date:** 8 – 12 March 2027 **Location:** San Diego **Fees:** 16000 Euro

Overview

Consultancy and Professional Services Procurement Training Course is a one-week intermediate course for procurement and commercial professionals who leave with a Consultancy Procurement Delivery Pack. Participants apply consultancy services procurement, professional services sourcing, consultancy scope design, technical proposal evaluation, consulting fee model analysis, and consultancy knowledge transfer controls. The course uses business-need tests, terms of reference, selection matrices, fee comparisons, deliverable registers, and governance reviews. Agile Leaders Training Center delivers this course in consultancy procurement.

Who Should Attend

- Procurement teams responsible for sourcing consulting and professional expertise
- Commercial teams responsible for selection methods, pricing, and contract controls
- Business sponsors responsible for defining needs, outcomes, and deliverables
- Finance teams responsible for fee models, budgets, and payment evidence
- Project teams responsible for mobilization, acceptance, and knowledge transfer

The course assumes participants define or buy professional services at work and leaves out legal advice, jurisdiction-specific procurement rules, consultant qualification licensing, and specialist tax treatment.

Departments and Industries

The course supports departments that commission, select, contract, and manage external expertise across sectors.

- Procurement and commercial management
- Strategy and transformation offices
- Finance and project management
- Healthcare and public-facing services
- Technology and industrial operations

Learning Objectives

By the end of this course, participants will be able to:

- Analyze whether consultancy is the appropriate delivery model.
- Build outcome-based terms of reference and deliverable definitions.
- Apply quality and cost criteria to consultant selection.
- Compare fee models and contract-control options.
- Use governance, acceptance, and change controls.
- Evaluate performance and knowledge-transfer evidence.

Course Agenda

Day 1: Define the Consultancy Need

- Consultancy Business Need Test
- Internal Capability Gap Assessment
- Consultancy Outcome and Benefit Map
- Stakeholder Responsibility Matrix
- Consultancy Procurement Strategy Brief

Day 2: Design Scope and Market Approach

- Terms of Reference Structure
- Deliverable and Acceptance Criteria Register
- Professional Services Market Engagement Plan
- Consultant Conflict and Independence Checklist
- Consultancy Sourcing Route Decision Matrix

Day 3: Evaluate Quality and Commercial Value

- Technical Proposal Evaluation Framework
- Expert Qualification Evidence Scorecard
- Quality and Cost Weighting Model
- Lump-Sum and Time-Based Fee Comparison
- Clarification and Due Diligence Record

Day 4: Contract and Govern Delivery

- Consultancy Contract Control Schedule
- Intellectual Property and Data Rights Checklist
- Mobilization and Dependency Plan
- Deliverable Review and Approval Workflow
- Change, Payment, and Performance Register

Day 5: Practice Consultancy Control

- Suggested Exercise: Challenge a Consultancy Business Case
- Suggested Exercise: Evaluate Competing Technical Proposals
- Suggested Exercise: Compare Consulting Fee Models
- Suggested Exercise: Diagnose a Deliverable Acceptance Dispute
- Capstone Exercise: Complete a Consultancy Procurement Delivery Pack

Practical Exercises

The course uses suggested activities with fictional consultancy needs, proposals, fee schedules, deliverables, and performance evidence.

- Suggested activity: decide whether a healthcare transformation need requires consultancy or internal delivery.
- Suggested activity: score technical and commercial proposals for an industrial advisory assignment.
- Suggested activity: convert a technology-services objective into deliverables and acceptance criteria.
- Suggested activity: plan governance, knowledge transfer, and corrective action for delayed consultancy work.

FAQs

Who suits consultancy services procurement, and what does the course assume?

Procurement, commercial, finance, project, and business professionals responsible for external expertise suit consultancy services procurement. The course assumes experience defining business needs, reviewing proposals, managing budgets, or overseeing deliverables.

How does consultancy services procurement differ from general procurement training?

Consultancy services procurement centers on intangible expertise, outcome definition, technical quality, expert capability, fee models, deliverable acceptance, and knowledge transfer, while general procurement training covers wider goods, works, and services.

What should consultancy terms of reference include?

Consultancy terms of reference should include the business context, objectives, scope, exclusions, outputs, deliverables, milestones, acceptance criteria, client inputs, governance, reporting, dependencies, required expertise, data access, and knowledge-transfer expectations.

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How should technical proposal evaluation balance quality and cost?

Technical proposal evaluation should use disclosed, weighted criteria for methodology, team capability, relevant experience, delivery plan, risk, and knowledge transfer, then combine technical and financial results through the approved selection method.

Why is consultancy knowledge transfer important?

Consultancy knowledge transfer protects continuity and retained capability by defining what the client must receive, who must learn it, the evidence of transfer, and how materials, methods, data, and decisions remain usable after the assignment.

Conclusion

Participants take back a Consultancy Procurement Delivery Pack. It combines a need test, terms of reference, market plan, selection matrix, fee comparison, due-diligence record, contract-control schedule, deliverable register, governance plan, and knowledge-transfer checklist. The pack helps teams convert a request for expertise into a controlled sourcing and delivery process with usable outcomes.