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How to scope technical assistance that gets implemented

A useful technical-assistance brief connects a business priority to work the team can adopt. Start with the change you want to enable, then agree the people, resources, decisions and evidence needed to put it into practice.

Technical assistance can take many forms: commercial analysis, financial planning, operating improvements, technology, specialist advice or management support. A report, workshop or new dashboard may be useful. The commissioning question is what the business will do differently because of it.

Use this guide before appointing a specialist, approving a delivery budget or extending an existing assignment. Work through it with venture leadership and the person commissioning the support. For a small assignment, a short shared brief may be enough; a portfolio programme needs an overall delivery framework and a separate scope for each venture.

1. Define the business change

Describe the opportunity or constraint in the business's own terms. Identify the decision it needs to make, the people affected and why the timing matters. Separate observed facts from assumptions about the cause.

A broad request such as 'improve financial management' leaves too much open. A more useful brief might ask for a weekly cash forecasting routine that the finance lead can update and the owner can use before committing to stock purchases.

- What is happening, and what evidence supports that view?
- What would the business do differently if the assignment worked?
- Which single priority matters most now?
- What can this assignment realistically influence, and what depends on capital, demand or another decision?

Write one sentence: We want [business team] to be able to [decision or action], so that [intended business change], by [review point].

Make the work usable.

2. Check whether the business can use the support

Confirm leadership interest, a practical implementation owner, access to relevant information and time to work with the specialist. A sponsor's priority and a venture's priority may differ; resolve that before appointing the team.

When the starting evidence is weak, commission a short diagnostic or data-reconstruction stage. Agree what it must establish and the decision that will follow. If a missing approval, unavailable manager or essential capital item blocks implementation, make that dependency explicit.

- Name the venture decision-maker and the person who will use each output.
- Agree access to records, staff, customers or systems, with appropriate permissions.
- Reserve time for testing, decisions and handover; record who supplies it.
- State the conditions that must be met before delivery starts.

3. Specify work outputs and how they will be used

Define the deliverables, activities and boundaries together. An output should have a named user, an intended use and a completion check. 'Build a dashboard' becomes more useful when it specifies the decision, data inputs, refresh routine and person maintaining it.

Record what is outside the assignment and how a proposed extension will be assessed. For equipment, software or regulated specialist work, specify the relevant technical requirements and who is qualified to approve them.

- Output: what will exist at the end?
- Use: who will apply it, and in which routine or decision?
- Acceptance: what test or evidence shows it is fit for the agreed purpose?
- Boundary: what remains the responsibility of the business, sponsor or another provider?

Example: a cash forecast is complete when the agreed inputs are reconciled, assumptions are visible, scenarios work, and the finance lead can update it using a documented routine.

RESPONSIBILITY AND EVIDENCE

Own the change. Check its use.

4. Make responsibility and decisions clear

A sponsor may commission and pay for support while the venture owns the operational change. Name both roles. Give the engagement lead responsibility for coordinating specialist contributions, progress and unresolved issues.

Agree who approves scope, accepts deliverables, supplies information and makes operating decisions. Set an escalation route and a decision turnaround that fits the business. Confirm how commercial information can be shared with the sponsor; access to support does not automatically mean unrestricted access to company records.

- Sponsor: authorises resources and agrees the reporting purpose.
- Venture lead: owns business decisions and implementation commitments.
- Engagement lead: coordinates delivery and raises risks or dependencies.
- Specialists: deliver their agreed contributions and transfer usable knowledge.
- Output owners: maintain the tools, processes and information after handover.

5. Distinguish delivery, adoption and results

Choose a small set of measures that helps people make decisions. Record the definition, starting point, source, owner, review frequency and intended direction. Set targets after checking the baseline and assumptions, rather than inventing a precise improvement figure at commissioning.

Separate what the team delivers from whether it is used and what changes in business performance. Where a sponsor expects social or environmental outcomes, describe the pathway, affected people, risks and evidence needed. Revenue growth or a count of installations alone does not establish wider impact.

- Delivery: the agreed forecast, process, experiment or system exists and passes its acceptance check.
- Adoption: the responsible business team uses and maintains it in the agreed routine.
- Business outcome: a relevant operating, commercial or financial measure changes over a defined period.
- Wider outcome: customers, workers, suppliers or the environment experience a relevant change, supported by suitable evidence.

Compare progress with the baseline and record other influences, such as seasonality, new capital or a change in demand. Describe the assignment's contribution without claiming it caused every observed result.

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RESOURCES AND DELIVERY

Resource the work. Review the evidence.

6. Resource the whole assignment

Budget for the work required to make the change usable: specialist and engagement-lead time, venture staff time, data preparation, testing, travel, tools, implementation costs and post-handover review. Specify the currency, applicable taxes, reimbursables, payment milestones and who pays for each item.

Discuss the potential business value and its assumptions. Consider costs, benefits, downside scenarios and the time over which value might emerge. Keep forecasts separate from realised results. A useful assignment may also improve a decision or avoid an unsuitable expansion; it does not always justify a neat short-term return calculation.

- Identify missing resources and the party responsible for providing them.
- Include approvals, procurement lead times and system access in the schedule.
- Agree a change process for added work, costs or dependencies.
- Confirm who owns and can use the work products and underlying information.

7. Use milestones to decide what happens next

Build a delivery sequence around evidence and decisions. Each milestone should identify an output or test, a reviewer and the decision it enables. The sequence below is a starting structure, not a fixed programme duration.

For a portfolio, use consistent reporting categories while allowing venture-specific objectives and definitions. Do not combine revenue, adoption or impact figures across ventures unless their meanings, periods and collection methods are comparable.

- Start: confirm scope, baseline plan, owners, access and resources.
- Diagnose: validate the priority and decide whether to proceed or revise the scope.
- Build and test: try the proposed tools or changes in a bounded setting.
- Review: compare evidence with acceptance criteria and resolve gaps.
- Handover: confirm the operating owner, documentation and maintenance needs.
- Follow through: review continued use and decide whether to close, adapt or extend.

Agree pause or change triggers in advance: information is unusable, the required owner is unavailable, a critical resource is delayed, testing contradicts an assumption, or the priority changes. Record the decision and its cost or timing implications.

ILLUSTRATIVE EXAMPLES

The same discipline. Different work.

These examples describe possible assignments. They are not completed Kuza Collective engagements or promised results.

Manufacturing / Understand margin before adding volume

Starting point: A production business has orders but limited visibility of product-level costs and delivery performance.

Work: Validate the costing inputs for a selected product group, test pricing or order-acceptance rules, and establish a weekly production and fulfilment review.

Outputs: Costing model, tested decision rules and a documented review routine.

Adoption check: The nominated team updates costs and uses the rules in actual order decisions.

Results to review: Track a consistently defined product margin and on-time delivery measure. Set the baseline and feasible targets with the business.

Dependencies: Reliable cost inputs, production access and authority to test the agreed decisions.

Clean energy / Make commercial rollout assumptions testable

Starting point: An energy venture wants to expand a channel or customer segment and needs clearer evidence of the economics and delivery requirements.

Work: Review a defined segment, build a scenario model and test a bounded sales-to-service process with the commercial and operating teams.

Outputs: Segment assumptions, decision-ready scenarios and a pilot operating plan.

Adoption check: The team records pilot evidence and uses agreed decision thresholds before wider rollout.

Results to review: Review contribution economics, conversion and service performance using agreed definitions; assess any customer or environmental claims separately.

Dependencies: Customer access, suitable commercial data and relevant technical approval for any system-related change.

Distribution / Improve replenishment in a bounded pilot

Starting point: A distributor wants to understand why stock availability and delivery reliability vary across outlets.

Work: Examine one route or outlet group, test a replenishment routine and clarify the information and responsibilities needed to maintain it.

Outputs: Pilot replenishment rules, stock/delivery records and an operating review.

Adoption check: The responsible staff maintain records and use the rules during the pilot.

Results to review: Review stockout frequency, fulfilment and cost-to-serve with consistent units and periods.

Dependencies: Stock records, route access, working-capital decisions and time from the operating team.

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COMMISSIONING CHECKLIST

Ready to start?

Use the questions below with the venture lead and commissioning sponsor. An unresolved item should become a decision, dependency or agreed diagnostic task.

1. The business priority and intended change are specific.
2. Venture leadership supports the assignment and has named an implementation owner.
3. Scope, boundaries and dependencies are recorded.
4. Each output has a user, acceptance check and approver.
5. The specialist team and decision responsibilities match the work.
6. Access, permissions and venture staff time are available or explicitly conditional.
7. Measures distinguish delivery, adoption and outcomes; baseline gaps are visible.
8. The budget covers implementation and follow-through as well as advice.
9. Milestones, reporting and change decisions are agreed.
10. Handover, maintenance and the follow-through review have named owners.

Use the editable brief

The companion Word template turns these questions into a working scope. Complete it jointly, attach detailed technical requirements where needed, and use it to agree the engagement before delivery.

Further reading

IFC — Anticipated Impact Measurement and Monitoring
https://www.ifc.org/en/our-impact/measuring-and-monitoring

Operating Principles for Impact Management — The 9 Principles
https://www.impactprinciples.org/9-principles/

GIIN — Using non-financial support to increase financial inclusion
https://thegiin.org/publication/research/giinsight-using-non-financial-support-to-increase-financial-inclusion/

This is Kuza Collective's practical framework. The sources provide background; they do not endorse this guide. Broader commercial or impact outcomes depend on implementation and context.

Discuss one venture or portfolio priority: hello@kuzacollective.com
The Kuza Collective Ltd, incorporated in Kenya.