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CONTRACTS MANAGEMENT | CON-026

Consultancy and Professional Services Agreements

Contact

+31 85 7444446
info@aractech.com
https://aractech.com

Address

Waarderweg 50, 2031 BP Haarlem - Netherlands.

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Course content

Why Attend

Organisations rely on consultants, advisers, designers, engineers, auditors and other professionals for expertise they do not have in-house. Professional services contracts are different from contracts for goods or works: the output is often advice or design, quality is harder to define, and the professional's duty of care, independence and liability are central concerns.

This Consultancy and Professional Services Agreements training course explains how to procure, draft and manage contracts for professional services. Participants learn how to define scope and deliverables, choose fee structures, set the standard of care, manage key personnel and conflicts of interest, allocate intellectual property, limit liability, require professional indemnity insurance and manage performance and change.

Course Methodology

• The course uses sample appointment documents, scope definitions and case studies. Participants draft scope and deliverable descriptions, compare fee models, review liability and insurance provisions and manage simulated performance issues with a consultant, considering both client and consultant viewpoints.

Course Objectives

• Explain the distinctive features of professional services contracts

• Define scope, deliverables and assumptions clearly

• Select appropriate fee structures and payment terms

• Understand the standard of care and fitness for purpose

• Manage key personnel, independence and conflicts of interest

• Allocate intellectual property and confidentiality obligations

Target Audience

• Procurement and contract managers

• Clients appointing consultants and advisers

• Consultancy and professional services firm managers

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- Project managers

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Course outline

Detailed course outline

Day-by-day outline for Consultancy and Professional Services Agreements.

Day 1 - Professional Services Contracting

- 09:00-09:34 | Types of professional and consultancy services
- 09:34-10:08 | How professional services differ from goods and works
- 10:08-10:42 | Standard forms of appointment in overview
- 10:42-11:00 | Procurement of consultants and selection criteria
- 11:00-11:30 | Coffee break
- 11:30-11:46 | Procurement of consultants and selection criteria (continued)
- 11:46-12:20 | Common problems in professional services contracts
- 12:20-12:53 | Client and consultant expectations
- 12:53-14:00 | Exercise: reviewing a sample consultancy appointment

Day 2 - Scope, Deliverables and Fees

- 09:00-09:34 | Defining scope, objectives and deliverables
- 09:34-10:08 | Stating assumptions, exclusions and client inputs
- 10:08-10:42 | Lump sum, time charge and percentage fees
- 10:42-11:00 | Milestone payments and success-based fees
- 11:00-11:30 | Coffee break
- 11:30-11:46 | Milestone payments and success-based fees (continued)
- 11:46-12:20 | Expenses, disbursements and rate escalation
- 12:20-12:53 | Avoiding scope creep and fee disputes
- 12:53-14:00 | Workshop: drafting scope and deliverables

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Day 3 - Standard of Care and Key Obligations

- 09:00-09:34 | Reasonable skill and care compared with fitness for purpose
- 09:34-10:08 | Key personnel and replacement provisions
- 10:08-10:42 | Independence and conflicts of interest
- 10:42-11:00 | Confidentiality and data protection
- 11:00-11:30 | Coffee break
- 11:30-11:46 | Confidentiality and data protection (continued)
- 11:46-12:20 | Intellectual property in reports and designs
- 12:20-12:53 | Reliance and third-party rights
- 12:53-14:00 | Exercise: analysing standard of care clauses

Day 4 - Liability and Insurance

- 09:00-09:34 | Limitation of liability for professional advice
- 09:34-10:08 | Net contribution and proportionate liability clauses
- 10:08-10:42 | Professional indemnity insurance requirements
- 10:42-11:00 | Duration of liability and limitation periods
- 11:00-11:30 | Coffee break
- 11:30-11:46 | Duration of liability and limitation periods (continued)
- 11:46-12:20 | Collateral warranties and assignment of rights
- 12:20-12:53 | Negotiating liability provisions with consultants
- 12:53-14:00 | Workshop: reviewing liability and insurance terms

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Day 5 - Managing Consultants

- 09:00-09:39 | Mobilisation and kick-off with consultants
- 09:39-10:18 | Monitoring progress, quality and deliverables
- 10:18-10:57 | Managing changes to scope and fees
- 10:57-11:00 | Handling poor performance and disputes
- 11:00-11:30 | Coffee break
- 11:30-12:06 | Handling poor performance and disputes (continued)
- 12:06-12:44 | Suspension, termination and handover of work
- 12:44-13:22 | Evaluating consultant performance at the end
- 13:22-14:00 | Personal action plan for professional services contracts

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Seminar dates

Available seminar dates

Live dates and pricing for Consultancy and Professional Services Agreements generated from the course details page.

Date	Location	Format	Fee
21 - 25 December 2026	London	Classroom	**€2,915**
7 - 11 December 2026	Barcelona	Classroom	**€2,275**
14 - 18 December 2026	Frankfurt	Classroom	**€2,175**
11 - 15 January 2027	London	Classroom	**€2,915**
18 - 22 January 2027	Barcelona	Classroom	**€2,275**
25 - 29 January 2027	Frankfurt	Classroom	**€2,175**
4 - 8 January 2027	Rome	Classroom	**€2,830**
15 - 19 February 2027	London	Classroom	**€2,915**
22 - 26 February 2027	Barcelona	Classroom	**€2,275**
1 - 5 February 2027	Frankfurt	Classroom	**€2,175**

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Seminar dates

Available seminar dates

Live dates and pricing for Consultancy and Professional Services Agreements generated from the course details page.

Date	Location	Format	Fee
8 - 12 February 2027	Vienna	Classroom	**€3,425**
22 - 26 March 2027	London	Classroom	**€2,915**
1 - 5 March 2027	Barcelona	Classroom	**€2,275**
8 - 12 March 2027	Frankfurt	Classroom	**€2,175**
15 - 19 March 2027	Amsterdam	Classroom	**€3,215**
5 - 9 April 2027	London	Classroom	**€2,915**
12 - 16 April 2027	Barcelona	Classroom	**€2,275**
19 - 23 April 2027	Frankfurt	Classroom	**€2,175**
26 - 30 April 2027	Cape Town	Classroom	**€1,825**
10 - 14 May 2027	London	Classroom	**€2,915**

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Seminar dates

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Live dates and pricing for Consultancy and Professional Services Agreements generated from the course details page.

Date	Location	Format	Fee
17 - 21 May 2027	Barcelona	Classroom	**€2,275**
24 - 28 May 2027	Frankfurt	Classroom	**€2,175**
3 - 7 May 2027	Dubai	Classroom	**€2,845**
21 - 25 June 2027	London	Classroom	**€2,915**
7 - 11 June 2027	Barcelona	Classroom	**€2,275**
14 - 18 June 2027	Frankfurt	Classroom	**€2,175**
26 - 30 July 2027	London	Classroom	**€2,915**
5 - 9 July 2027	Barcelona	Classroom	**€2,275**
12 - 16 July 2027	Frankfurt	Classroom	**€2,175**
19 - 23 July 2027	Istanbul	Classroom	**€2,825**

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Seminar dates

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Date	Location	Format	Fee
2 - 6 August 2027	London	Classroom	**€2,915**
9 - 13 August 2027	Barcelona	Classroom	**€2,275**
16 - 20 August 2027	Frankfurt	Classroom	**€2,175**
23 - 27 August 2027	Kuala lumpur	Classroom	**€2,425**
20 - 24 September 2027	London	Classroom	**€2,915**
6 - 10 September 2027	Barcelona	Classroom	**€2,275**
13 - 17 September 2027	Frankfurt	Classroom	**€2,175**
18 - 22 October 2027	London	Classroom	**€2,915**
25 - 29 October 2027	Barcelona	Classroom	**€2,275**
4 - 8 October 2027	Frankfurt	Classroom	**€2,175**

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Seminar dates

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Date	Location	Format	Fee
11 - 15 October 2027	Munich	Classroom	**€2,425**
22 - 26 November 2027	London	Classroom	**€2,915**
1 - 5 November 2027	Barcelona	Classroom	**€2,275**
8 - 12 November 2027	Frankfurt	Classroom	**€2,175**
15 - 19 November 2027	Paris	Classroom	**€2,810**
6 - 10 December 2027	London	Classroom	**€2,915**
13 - 17 December 2027	Barcelona	Classroom	**€2,275**
20 - 24 December 2027	Frankfurt	Classroom	**€2,175**
27 - 31 December 2027	Rome	Classroom	**€2,830**
21 - 25 December 2026	Online / Live	Online / Live	**€1,625**

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Seminar dates

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Date	Location	Format	Fee
7 - 11 December 2026	Online / Live	Online / Live	**€1,625**
14 - 18 December 2026	Online / Live	Online / Live	**€1,625**
11 - 15 January 2027	Online / Live	Online / Live	**€1,625**
18 - 22 January 2027	Online / Live	Online / Live	**€1,625**
25 - 29 January 2027	Online / Live	Online / Live	**€1,625**
4 - 8 January 2027	Online / Live	Online / Live	**€1,625**
15 - 19 February 2027	Online / Live	Online / Live	**€1,625**
22 - 26 February 2027	Online / Live	Online / Live	**€1,625**
1 - 5 February 2027	Online / Live	Online / Live	**€1,625**
8 - 12 February 2027	Online / Live	Online / Live	**€1,625**

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Date	Location	Format	Fee
22 - 26 March 2027	Online / Live	Online / Live	**€1,625**
1 - 5 March 2027	Online / Live	Online / Live	**€1,625**
8 - 12 March 2027	Online / Live	Online / Live	**€1,625**
15 - 19 March 2027	Online / Live	Online / Live	**€1,625**
5 - 9 April 2027	Online / Live	Online / Live	**€1,625**
12 - 16 April 2027	Online / Live	Online / Live	**€1,625**
19 - 23 April 2027	Online / Live	Online / Live	**€1,625**
26 - 30 April 2027	Online / Live	Online / Live	**€1,625**
10 - 14 May 2027	Online / Live	Online / Live	**€1,625**
17 - 21 May 2027	Online / Live	Online / Live	**€1,625**

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24 - 28 May 2027	Online / Live	Online / Live	**€1,625**
3 - 7 May 2027	Online / Live	Online / Live	**€1,625**
21 - 25 June 2027	Online / Live	Online / Live	**€1,625**
7 - 11 June 2027	Online / Live	Online / Live	**€1,625**
14 - 18 June 2027	Online / Live	Online / Live	**€1,625**
26 - 30 July 2027	Online / Live	Online / Live	**€1,625**
5 - 9 July 2027	Online / Live	Online / Live	**€1,625**
12 - 16 July 2027	Online / Live	Online / Live	**€1,625**
19 - 23 July 2027	Online / Live	Online / Live	**€1,625**
2 - 6 August 2027	Online / Live	Online / Live	**€1,625**

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9 - 13 August 2027	Online / Live	Online / Live	**€1,625**
16 - 20 August 2027	Online / Live	Online / Live	**€1,625**
23 - 27 August 2027	Online / Live	Online / Live	**€1,625**
20 - 24 September 2027	Online / Live	Online / Live	**€1,625**
6 - 10 September 2027	Online / Live	Online / Live	**€1,625**
13 - 17 September 2027	Online / Live	Online / Live	**€1,625**
18 - 22 October 2027	Online / Live	Online / Live	**€1,625**
25 - 29 October 2027	Online / Live	Online / Live	**€1,625**
4 - 8 October 2027	Online / Live	Online / Live	**€1,625**
11 - 15 October 2027	Online / Live	Online / Live	**€1,625**

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22 - 26 November 2027	Online / Live	Online / Live	**€1,625**
1 - 5 November 2027	Online / Live	Online / Live	**€1,625**
8 - 12 November 2027	Online / Live	Online / Live	**€1,625**
15 - 19 November 2027	Online / Live	Online / Live	**€1,625**
6 - 10 December 2027	Online / Live	Online / Live	**€1,625**
13 - 17 December 2027	Online / Live	Online / Live	**€1,625**
20 - 24 December 2027	Online / Live	Online / Live	**€1,625**
27 - 31 December 2027	Online / Live	Online / Live	**€1,625**