

# **Energy Decarbonisation Consultant - Script**

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**M** = Manager ("Paula", via SSO)

**T** = Triage Tool (AI behaving like an experienced commercial partner)

Paula is a senior manager at OCS. She wants to engage an Energy Decarbonisation Consultant she has worked with before. She believes this is a straightforward day rate engagement, we know that the Consultant will likely want to be paid outside of IR35 but the role will probably fail those tests.

## **1. Initial Requirement**

**M:**

I need an Energy Decarbonisation Consultant.

**T:**

Hi Paula. Great, I can help with that.

Before we go further, can I just check - are you looking to engage an individual in a specific role for a period of time, or are you looking for a defined outcome or a service to be delivered?

**M:**

It's a role.

## **2. Named / Preferred Check and confirmation that this stops a competitive sourcing process (Early Governance Capture)**

**T:**

Understood. Do you already have someone in mind, or would you like us to source options?

**M:**

Yes, I have someone in mind.

**T:**

Thanks. Has anything been formally agreed with them yet, or are they just your preferred candidate at this stage?

**M:**

Nothing formal. He's just my preferred option.

**T:**

That's fine. We'll treat this as a preferred individual and can prioritise him in the process.

Can I sense check at this stage that you are comfortable with the knowledge that using a named candidates means we don't have the opportunity to look for a better skills match or lower day rate candidate?

**M:** Yes, I don't have time to get someone totally new up to speed.

**T:** understood. Can you confirm his name and whether you've discussed availability?

**M:**

Jimmy Starbucks. He's tentatively accepted but I don't know when he can start.

### **3. Timing, Location, Budget**

**T:**

Great. Can you confirm:

- Your preferred start date
- Location or hybrid expectation
- Budget range you're working within

**M:**

Start at the beginning of the 26/27 financial year.

Based at OCS Head Office, probably 3-4 days per week onsite and one from home.  
£1,500 per day.

**T:**

Thank you. And how long do you expect to need Jimmy for?

**M:**

Max three months.

**T:**

Can i double check you do not need a person recruited to the role on a permanent basis

**M:**

No

### **4. Clarifying Scope (Outcome vs Capacity)**

**T:**

Just so I understand properly - what will Jimmy actually be responsible for delivering during those three months?

Is this:

- A defined decarbonisation roadmap with specific outputs?
- Support to an existing energy programme?
- Or general advisory capacity embedded within your team?

**M:**

He'll be embedded in our energy and engineering team.

He'll help shape our decarbonisation strategy, engage with clients and support some bids. It's more advisory and capacity than a fixed deliverable.

**T:**

That's helpful. So this is likely to be measured on time and contribution rather than a clearly defined outcome with milestones.

**M:**

Yes, that's right.

## **5. Control & IR35 Signals**

**T:**

A few important governance checks, Paula.

Will Jimmy:

- Work under direction from an OCS person?
- Be required to attend internal meetings and follow OCS working hours?
- Be unable to send a substitute in his place?

**M:**

Yes, he'll report to our Head of Energy.

Mostly he has to work our hours as he is in the office as part of the team.

No, substitution wouldn't work as he has to manage a team and know us and what we need.

## **6. IR35 Discussion (Explain, Don't Determine)**

**T:**

Thank you. Based on what you've described, this is likely to fall inside IR35, because:

- He will be embedded in your team managing people
- You'll exercise direction and supervision
- There's no genuine substitution
- It's time-based delivery rather than outcome-based

We won't make a legal determination here, but this may require a formal Status Determination Statement (SDS) before engagement. We'll take care of all of that don't worry, but it may come up in conversation with Jimmy as many contractors incorrectly assume they can choose whether they work inside or outside of IR35 – but the determination and the risk is ours at OCS not theirs!

Given this structure, there are two commercially safer routes than outside of IR35:

1. Fixed Term Contract (FTC) via PAYE if this may extend beyond three months
2. Engagement via our contractor payroll partner, with appropriate IR35 treatment

If the requirement is likely to extend, an FTC can reduce risk and cost volatility compared to rolling day rates.

Do you believe this may extend beyond the initial three months?

**M:**

Unlikely as we have a deadline to meet.

## **7. Commercial Implications Explained**

**T:**

Understood. A few considerations for you:

- £1,500 per day over three months is c. £90,000 before on-costs
- If extended to six months, that doubles
- Inside IR35 day rates can increase total cost once employer liabilities are applied – your budget will need to cover a full charge rate rather than Jimmy's rate.
- A fixed-term structure may give stronger cost predictability

Would you like us to explore both models commercially once we've had conversations with Jimmy and come back to you with a full cost before confirming engagement?

**M:**

Yes, that would be helpful.

## **8. Talent Pool Check**

**T:**

In terms of reaching out to Jimmy, has Jimmy worked for OCS before?

**M:**

Yes, he did a piece of work before Christmas.

**T:**

Great. He may already sit within our talent pool or historic records.

Do you have his contact details?

**M:**

Not to hand.

**T:**

No problem. We'll attempt to locate him through existing records.

Just to check - is Jimmy known by any other professional name or limited company name?

**M:**

No, just Jimmy Starbucks.

## **9. Governance & Approvals**

**T:**

Have you secured the internal budget approval for this engagement?

**M:**

Yes, it's approved within my FY26/27 plan.

**T:**

Perfect. We'll get started straight away.

## **10. Engagement Route Recommendation (Explained)**

**T:**

Based on what you've told me, this requirement is:

- Individual-led

- Capacity-based
- Time-measured
- High supervision
- No substitution
- Likely inside IR35

The appropriate primary route is:

### **Independent contractor engagement via payroll partner (inside IR35 treated)**

We will:

- Include Jimmy as your preferred candidate
- Conduct SDS assessment if needed
- Validate commercial comparison between inside and outside of IR35 day rates and FTC
- Confirm onboarding route

If circumstances change and this becomes a defined outcome (e.g. a decarbonisation strategy document with milestones), we could revisit a Statement of Work model instead.

We can also go to our OCS perm and professional agencies if needed.

## **11. Communication Preference**

**T:**

If we need clarification during SDS or commercial validation, or if Jimmy isn't available, what's the best way to reach you - mobile, Teams or email?

**M:**

Teams is best.

**T:**

Noted. We'll contact you via Teams if required.

## **12. Submission Confirmation**

**T:**

Thanks Paula. Here's what we've captured:

- Energy Decarbonisation Consultant

- Preferred candidate: Jimmy Starbucks
- Start: Beginning FY26/27
- Duration: 3 months (extension possible)
- Location: OCS Head Office, hybrid 3–4 days onsite
- Budget: £1,500 per day
- Approved: yes
- Likely inside IR35
- Engagement route: Contractor payroll partner, FTC comparison to be explored

We'll now progress this into formal triage and SDS assessment.

Initial validation will be completed within 24 hours and we'll revert with the commercial route comparison before confirming engagement.

If anything changes Paula, let us know before sourcing begins