A Winning Model for Performance Consulting

A practical approach for internal and external consultants to achieve customer satisfaction.

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Vicki Atkinson, RDEA - Managing Director - Executive Consultant
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A Little Bit About Us – Who We Are and What We Do
What You’ll “Take Away”

- Appreciate the performance consultant’s role in satisfying clients
- Identify a significant challenge in satisfying your clients
- Appreciate how principles were applied in various “real-life” client examples
- Recognize how the principles when applied as a whole enable high levels of customer satisfaction
A Winning Model for Performance Consulting

<table>
<thead>
<tr>
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<th>CREDIT Model</th>
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<tbody>
<tr>
<td>C</td>
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Client Satisfaction Criteria

On a scale of 1 to 5, 5 being very good, please rate the following:

<table>
<thead>
<tr>
<th>Category</th>
<th>1</th>
<th>2</th>
<th>3</th>
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<tbody>
<tr>
<td>Consultants’ willingness to understand your specific business</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<td>Consultants’ willingness to customize offerings to meet your requirements</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Consultants’ understanding of your business goals and objectives</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td>Consultants’ interpersonal skills/professionalism</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td>Consultants’ communication skills (listening, use of terminology – verbal and written)</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<td>Consultants’ ownership of issues/problems within the engagement</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<td>Consultants’ responsiveness (timely response to questions/requests, easy to get in touch with, available when needed)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Consultants’ subject matter knowledge (experience and expertise)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Consultants provided recommendations and solutions relevant to business needs</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Deliverables met objectives as agreed to in Statement of Work</td>
<td>0</td>
<td>0</td>
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Understanding Client Needs

- Begin with an understanding of the business
- Based on your role, internal or external consultant, ask appropriate questions that relate to the business:
  - Business goals
  - Changes to the business
  - Who is impacted by the changes
  - Organization structure and mission
- Ask questions that focus on need to solve a business problem
  - What does client want to achieve
  - What are the expected benefits
  - What happens if nothing is done

Clarifying the business problem helps visualize solutions
For Example: Understanding Client Needs

What we discovered

- Don’t “force” what you believe to be the client need
- Remain flexible
- Allow for changes
Developing Client Relationships

- Establish type of relationship: vendor, partner, pair of hands
- Create a common goal
- Build understanding, trust, and respect
- Delineate roles to ensure clarity and avoid misunderstanding
Delineating Consultant/Client Roles

**Client Responsibilities**
Assign a project leader as the single point of contact for the duration of the proposed services. The project leader’s responsibilities include:
- Serve as the primary liaison to the consultant and to participating client employees participating in this project
- Schedule and ensure the participation of all appropriate client executives, management, and employees for project activities
- Participate with consultants in on-site activities for skill transfer
- Provide the consulting team with access to needed information relative to the scope of this project
- Participate in the project reviews, as needed.
- Administer project change control, as needed
- Help resolve project issues and escalate issues within the organization, as necessary
- Accept, review, and approve deliverable materials

**Consultant Responsibilities**
The consultant’s primary project management responsibility is to provide technical direction and control of consulting project personnel and to provide a framework for project communications, reporting, procedural, and contractual activity. The tasks are:
- Maintain project communications through the client project leader
- Establish documentation and procedural standards for the development of the project
- Prepare a project plan which describes tasks, schedules, and responsibilities
- Measure and evaluate progress against the project plan
- Resolve deviations from the project plan
- Conduct review meetings, as needed
- Administer project change control procedures, as needed
- Coordinate the technical activities of project personnel
- Produce and deliver all items listed in the deliverables section of this proposal
For Example: Understanding Client Needs and Building Client Relationships
Demonstrating Expertise and Experience

- Applied processes, methodologies and models
- Proven business results

Clients care about quality results, not specific models
Creating Deliverables

- Customized deliverables reflect the consultant/client agreement at the beginning of the project.
- Final deliverable often includes:
For Example: Demonstrating Expertise and Experience and Agreeing on Deliverables
Demonstrating Interpersonal Skills
Tracking and Managing a Project

- Components include: planning, scheduling, providing status updates, managing change, tracking cost, expense and resources.
- Project managing means taking ownership, being proactive, and acting on potential problems before they become problems.
For Example: Tracking & Project Management
The CREDIT Model is used to ensure that we are on target doing what matters most to our clients.

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Let’s Continue Talking – Q & A

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