think180

Workshop - "Delivering Professional Services"

Aim

Guide technical specialists and account managers in what it takes to be a professional consultant and effectively manage projects and client relationships.

Description

The focus of this workshop is the ongoing management of a client relationship, and ensuring delivery of a service, or providing effective consulting, to meet client expectations within the scope of agreement and delivery model of vendor. It can be offered and adapted for specialized support groups providing services to departments within their own company, whom they treat as clients.

The core content and emphasis is adapted to suit the workshop audience. At one end, the workshop audience spectrum ranges from consultants working with clients as part of a Professional Services Group (PSG) engagement, and also wear the hat of Account Manager for themselves. At the other end of the spectrum, there are Account Managers whose role is the overall management of the delivery of services to one or more clients.

For greater impact and best use of participant time, a workshop should have participants from only one group, to ensure specific focus on the needs of that group.

Method!

Think180 consultants research and become familiar with the nature of the services delivered and the client base. We also work with the PSG Director or the Account Managers to determine practices and priorities, as well as issues that need to be addressed. Participants are surveyed to gather information on their backgrounds, roles, and individual needs.

The workshop combines open discussion and problem solving with experienced instruction in effectively managing client relationships and service delivery. Style is fast-paced and highly participatory, using instruction and examination of real situations to create a high-energy event. There is an emphasis on capturing any agreements, actions, and items needing further attention and follow-through after the workshop.

Content

Content and balance of attention for any one workshop will depend on where the participant group is on the spectrum of Consultant to Account Manager, and the particular needs determined for that group. This content may include:

- Creating engagements and setting up client projects
- Handling scope of work changes
- Dealing with extra demands
- Managing client expectations
- Discovering underlying issues and needs vs. what expressed by client
- Identifying and presenting additional opportunities
- Assessing and communicating value versus time to clients
- Managing client problems versus problem clients
- Games that clients play
- Problem-solving techniques applied
- Partnering for planning and problem-solving
- Consulting disciplines and management
- Role of the Professional Services Consultant
- Delivering services to internal clients
- Project management for Account Managers and Consultants
- Managing conflicting demands and loyalty (own company and client)

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Materials

Think180 has developed specialized material on this subject, and incorporated relevant content from the vendor elements of the "Creating Effective Partnerships" Workshop. This is formatted in a training binder that is adapted and augmented to meet each client's particular needs. Each participant receives:

- Binder/workbook with comprehensive handout notes on topics covered
- Tip Sheets on areas most relevant to particular client needs
- Selected book that best suits needs of company and participants

Benefits

Participants or teams who attend this workshop are able to benefit through:

- Greater understanding of the client-vendor relationship and its dynamics
- Increased thoroughness in planning and defining client work
- Tools for handling difficult situations and resolving problems
- Greater insight into how operational and business issues impact needs
- A greater understanding of how to define value versus cost with clients
- Immediate guidance in specific situations raised and discussed
- Increased awareness of how clients see vendors and what they expect
- Better deployment and use of internal consultants to client priorities

Options

Depending on outcomes and results sought, the client may consider:

- Including more custom content around company processes and standards
- Survey of internal client departments to gauge needs and feedback
- Involving Legal or Purchasing to embody company contract procedures
- Receiving an assessment/report on post-workshop implementation
- Using follow-up support/coaching with manager, team or individuals
- Check with Sales or Marketing how PSG is positioned to external clients

Evaluation

Client receives a summary report of the workshop content and learning gains. As an option, 6 to 8 weeks after the course, client may request an impact and value summary based on participants reports on implemented learning in their work.

Facilitators

The two session leaders, Jane Dixon and Jim Everett, have a great depth of practical expertise in this field, as consultants and as experienced managers. Jim Everett has a solid background in management training, as well as years of management experience in Customer Services and reseller training. Jane Dixon is an experienced senior manager in the delivery of consulting and professional services, with a strong finance, operations and systems integration background.

Feedback

"Overall, outstanding. Very helpful to me personally & (my) staff in general."

"An excellent day, well planned and executed – thanks!"

"Now I know how to deal with a customer who pressures me to do extra jobs."

(As a result of attending this workshop) "I will be more aware of other opportunities that may exist behind the current project."