



*“We Help
Put America
Through
School”*

SFA University Performance Consultant Service Delivery Description

March 25, 2002

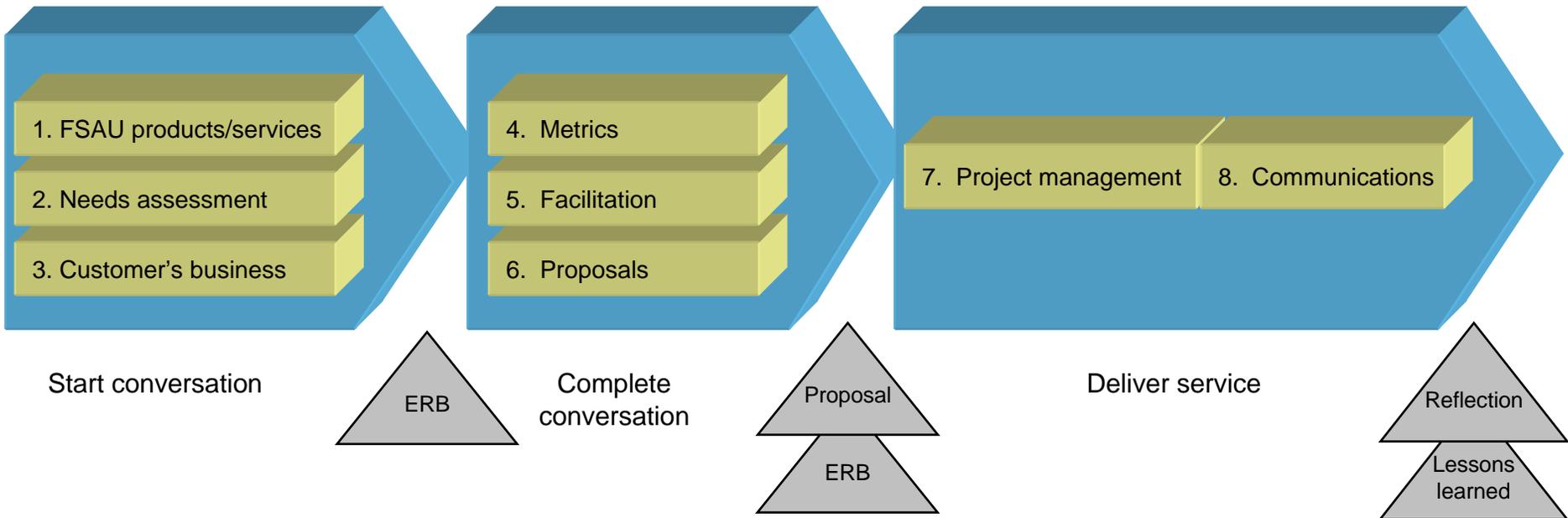
The performance consultant service delivery description includes the following components:

- Training plan
 - Phases to develop performance consultant competencies
- Needs assessment steps
 - Steps to conduct needs assessment with customers
- Proposal development process flow
 - Overview of steps involved in proposal creation
- “Editorial review board” description
 - Explanation of review board composition and responsibilities

Draft for discussion purposes

Training Plan

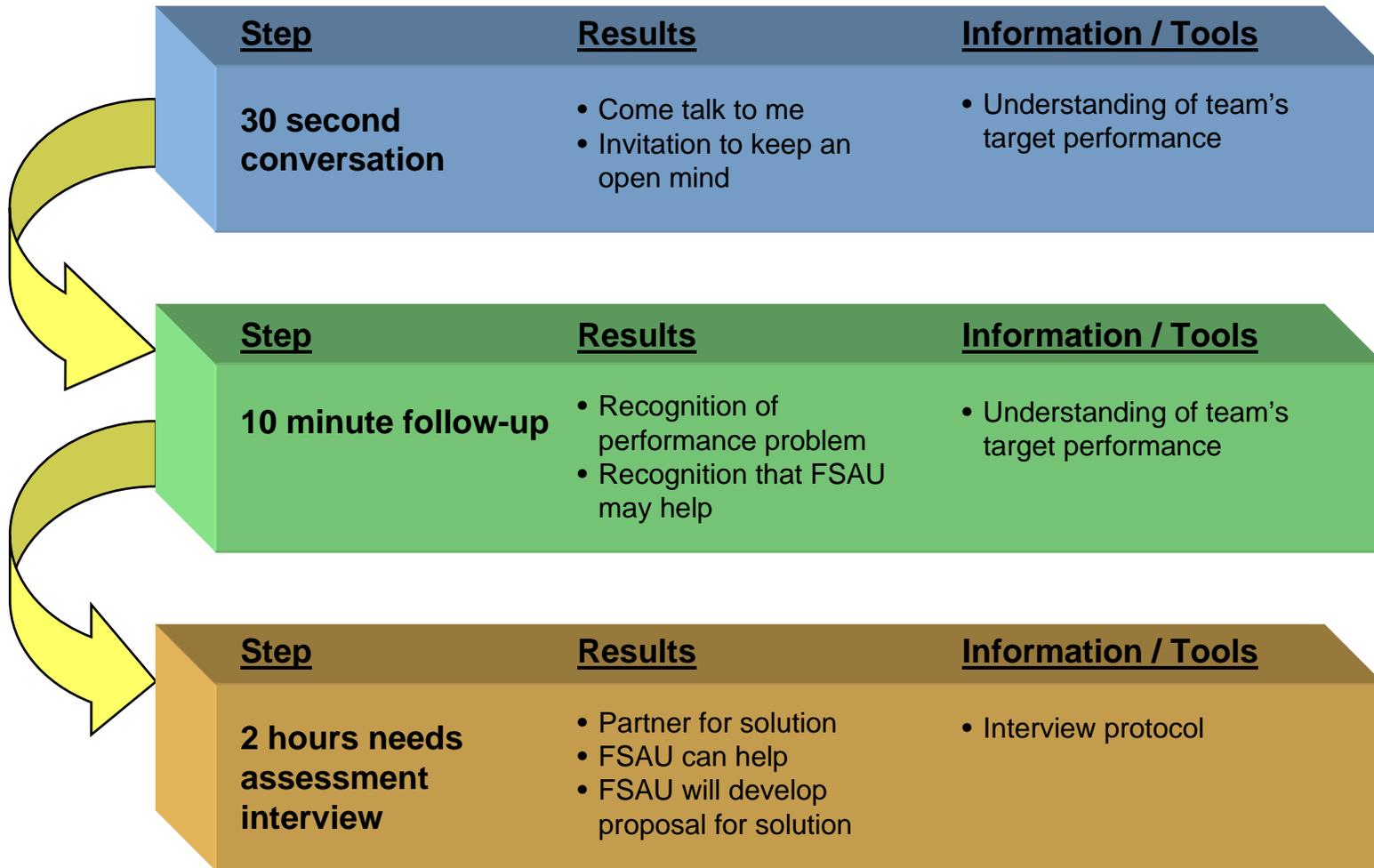
Customer Relationships



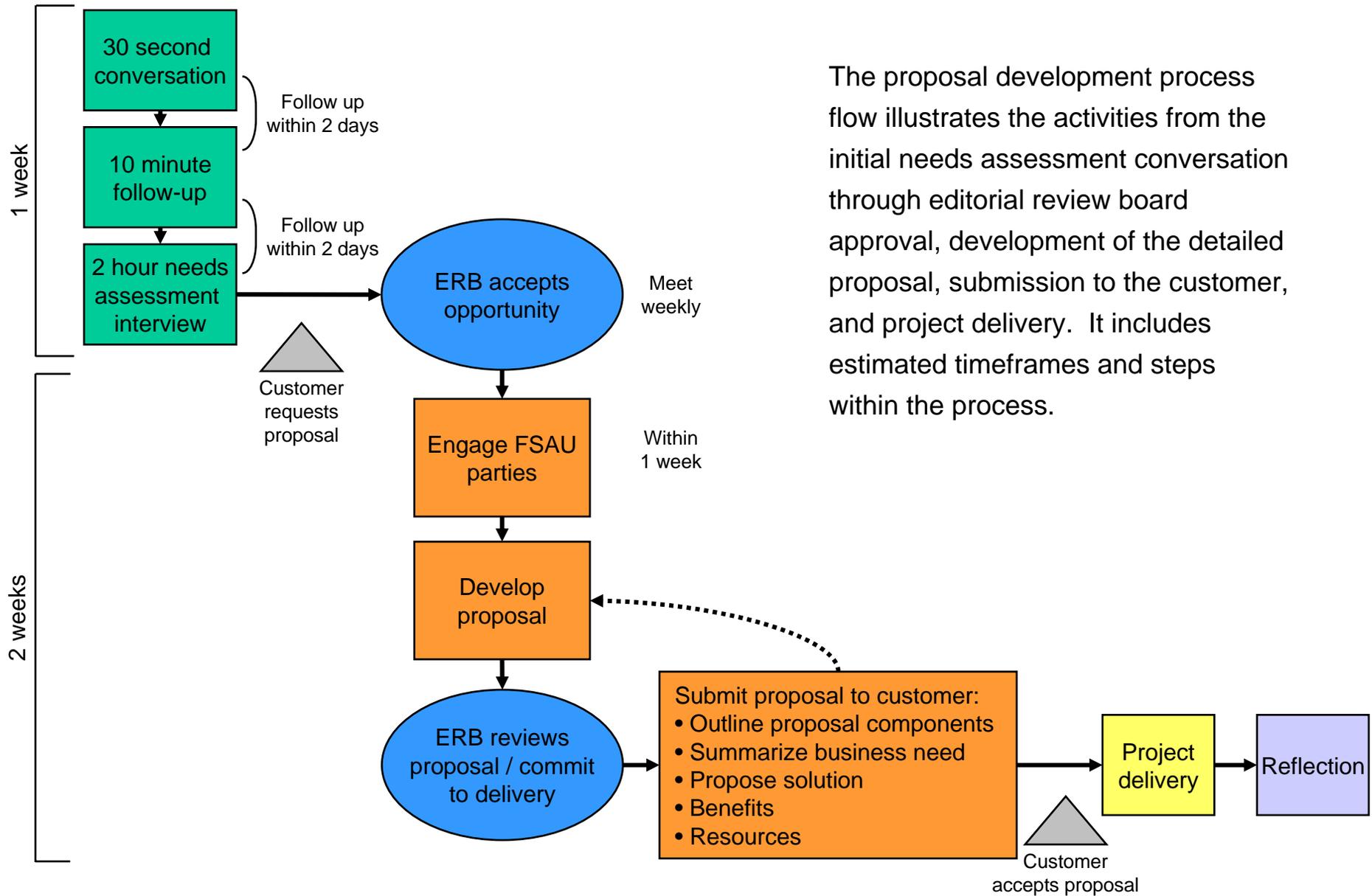
Develop core characteristics

- Customer focused
- Service oriented
- Highly motivated
- Detail oriented
- Strong interpersonal skills
- Team player
- Trustworthy
- Committed to the PBO
- Approachable
- Quick learner
- Persistent
- Independent work style

Needs Assessment Steps



The Proposal Development Process Flow



Editorial Review Board Definition

Who: FSAU team leads; Stephen (process owner), Bill (board chair), Anne (strategy), Tony (resources)

When: Scheduled as part of weekly managers meeting, based on demand

Purpose:

I. Determine which projects we will manage

- Review requests for FSAU products/services
- Determine if request is in scope (or should be in potential scope)
- Determine if FSAU will pursue the opportunity
- Review existing projects / opportunities

II. Support proposal development

- Determine who will prepare the proposal
 - What skills are needed? Who will be assigned?
- Timeframe / next steps
- Intelligence / advice
- Set appropriate expectations

III. Support proposal delivery

- Review proposal
- Review client needs
- Approve / agree to final proposal OR opt out / exit

IV. Project oversight

- Regular status reporting from delivery team
- Delivery support
- Support efforts to exceed expectations
- Acknowledgement of successes
- Service recovery

V. Reflection

- Feedback from the customer
- Lessons learned
- Thoughts for future opportunities