



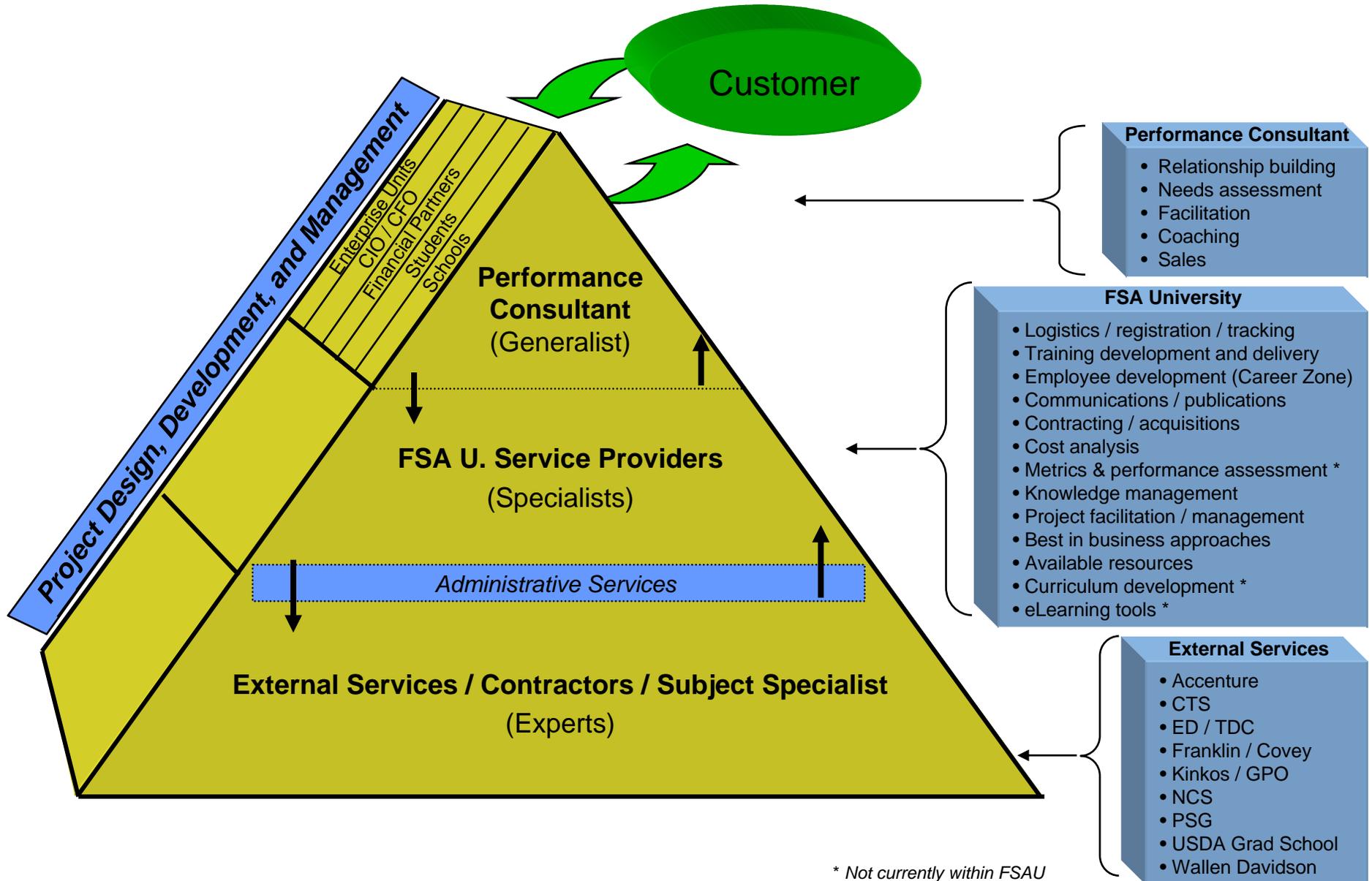
FSA University Performance Consultant Service Delivery Deployment Update

April 3, 2002

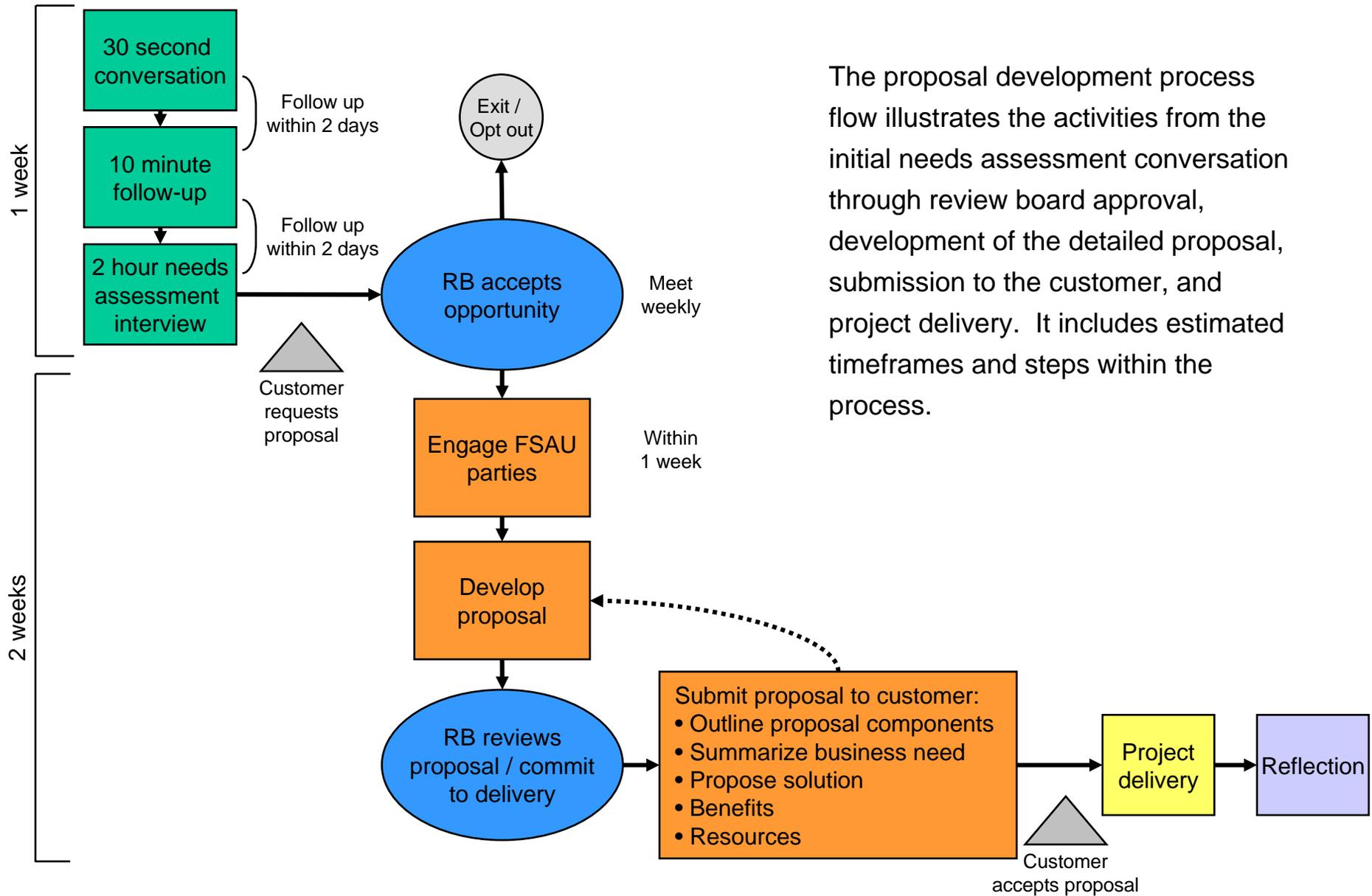
The performance consultant service delivery deployment update includes the following components:

- Performance Consultant model
- Proposal development process flow
 - Overview of steps involved in proposal creation
- Needs assessment steps
 - Steps to conduct needs assessment with customers
- “Review board” description
 - Explanation of review board composition and responsibilities
- Training plan
 - Phases to develop performance consultant competencies
- Marketing plan
 - List of tasks to market this position and FSAU’s services
- Next steps

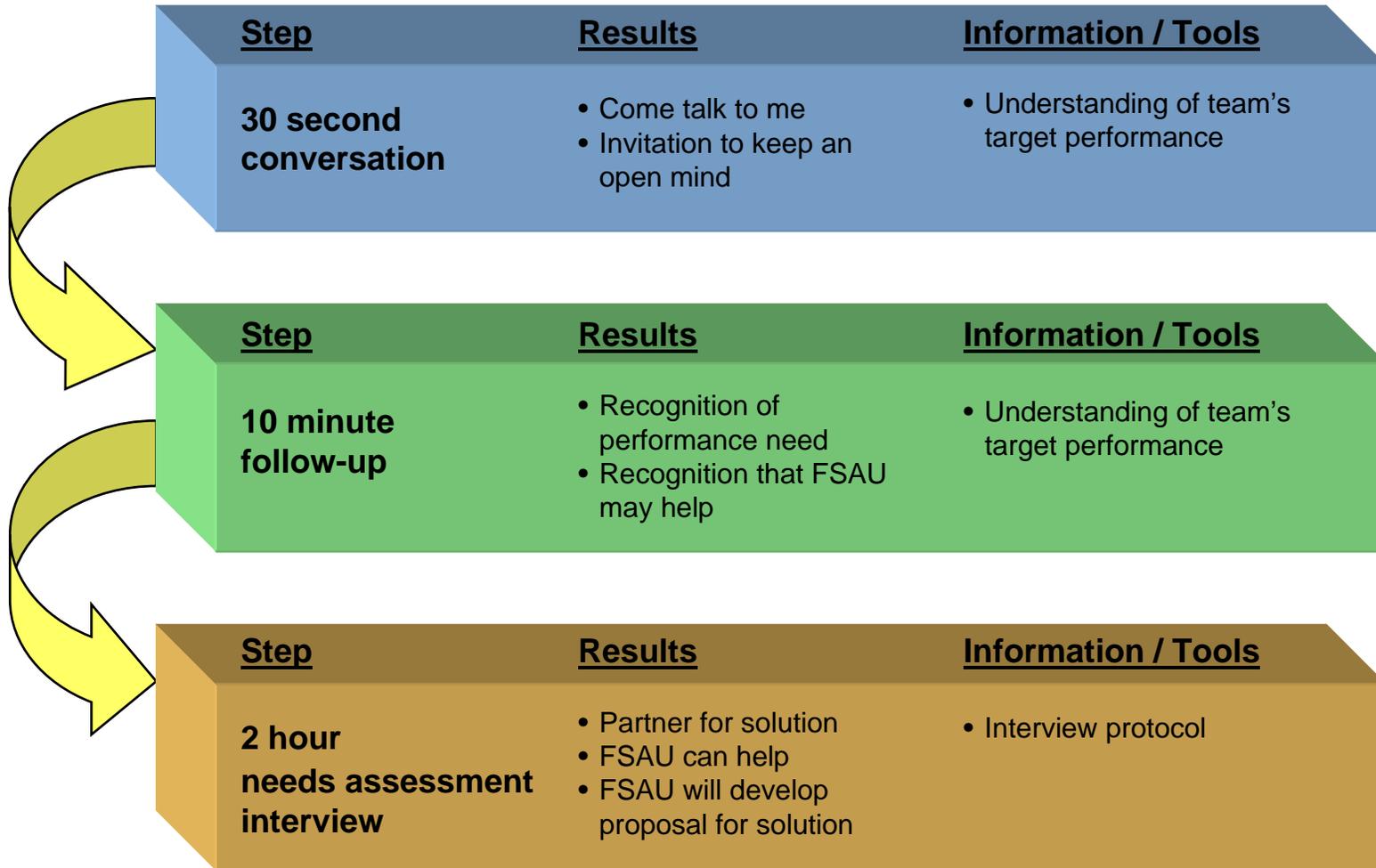
Performance Consultant Overview



The Proposal Development Process Flow



Needs Assessment Steps



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 demand and requests for FSAU products/services
- Determine if request is in scope (or should be in potential scope)
- Determine if FSAU will pursue the opportunity

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

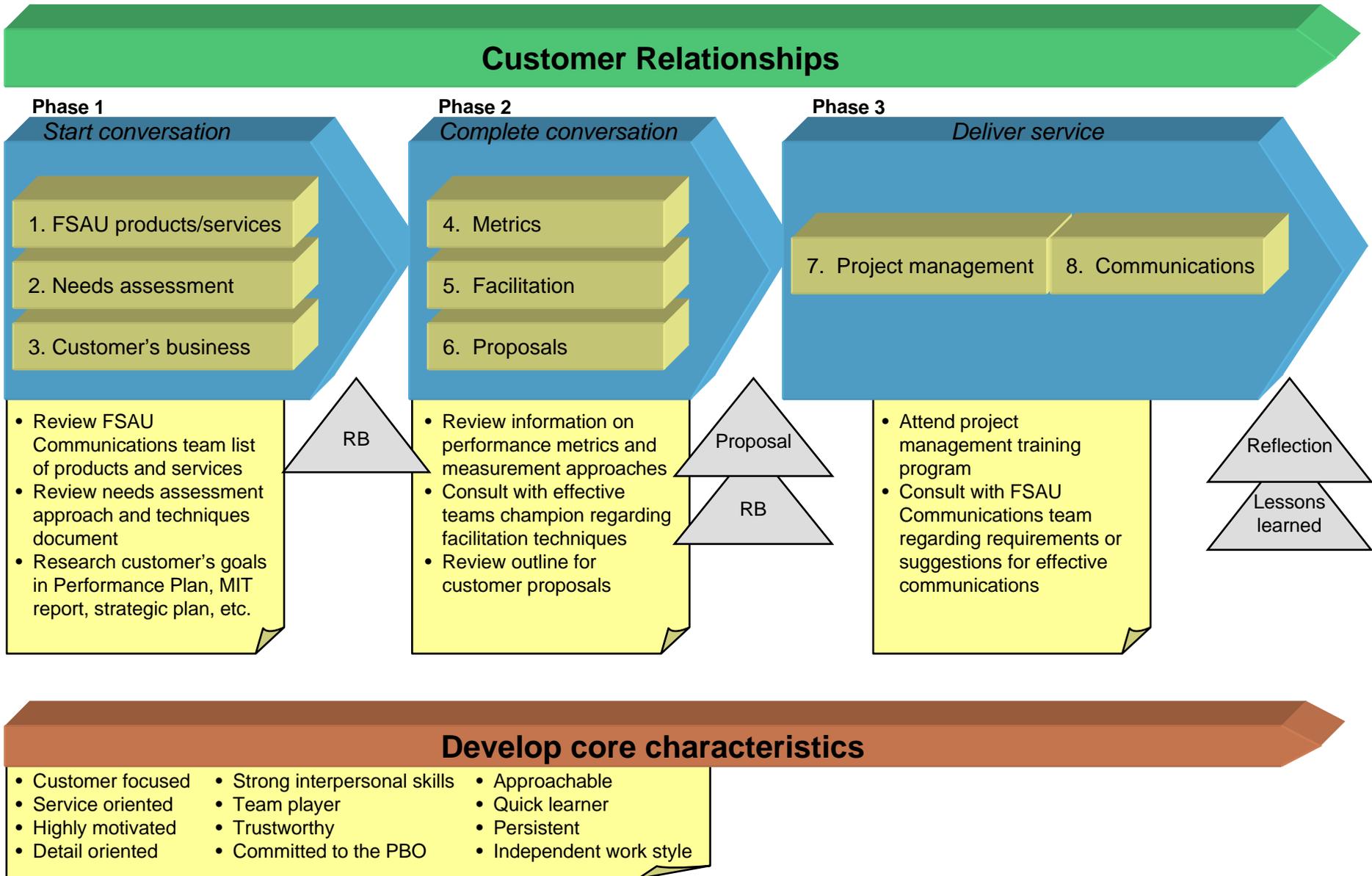
IV. Project oversight

- Review existing projects / opportunities
- Control project work, milestones, and scheduling
- Regular status reporting from delivery team
- Support delivery
- Acknowledge successes
- Assist teams with service recovery

V. Reflection

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

Performance Consultant Training Plan



Marketing Plan

- ❑ **Create brochure for distribution to customers**
 - Includes list of FSA University products and services
 - Outlines performance consultant offerings (modeled on ITR presentation)

- ❑ **Conduct basic informational walk-through with primary customers (GMs and direct reports)**
 - Present brochure of products and services
 - Provide business cards to the customer(s) for future contact
 - Explain how specific offerings may be applicable to organization / unit / team
 - Follow-up with customer to answer questions or offer services

- ❑ **Maintain record of conversations**
 - Keep a log of conversations with customers (including e-mails and phone calls) to assist with needs assessment
 - Note potential opportunities identified through research or reading about the customer's needs, such as in the Performance Plan

- ❑ **Conduct needs assessment(s)**

Next Steps

- Present update to FSAU leadership
- Develop FSAU products and services list / brochure
- Conduct training – Phase 1
- Assign leaders to FSA units
- Be in conversation with customers
 - Presentation to senior managers
 - One-on-one with senior managers
- Conduct training – Phase 2
- Conduct review board session with proposals
- Determine scope
- Obtain curriculum development resources