



Performance Consultant Workshop May 9, 2002 9 AM – 12:30 PM

Purpose: To prepare FSAU representatives to be performance consultants.

- Desired Outcomes:** *By the end of this workshop, we will be able to:*
- Explain the performance consultant role.
 - Identify the steps and processes involved in being a performance consultant.
 - Begin deploying the performance consultant process.

Agenda:

What	How	Who	Time
Start Up: – Welcome/ Purpose – Outcomes/ Agenda	<ul style="list-style-type: none"> • Introduction, welcome, and purpose • Review the agenda and the desired outcomes 	<ul style="list-style-type: none"> • Anne • Stephen 	<ul style="list-style-type: none"> • 5 min.
Overview: – Goals – Process	<ul style="list-style-type: none"> • Present overall concept (all phases) • Discuss overview of performance consultant role • Explain goals of the position • How will we measure our own success? • Explain the process: <ul style="list-style-type: none"> ○ Discussion, needs assessment, proposal, review board, deliver services, reflect/review 	<ul style="list-style-type: none"> • Stephen 	<ul style="list-style-type: none"> • 15 min.
The Customer <i>(Customer comes first)</i>	Customer relationships <ul style="list-style-type: none"> • Advice from learning consultants • How to develop them? Tips on consulting • Not sales – being in conversation • Key elements to the “consulting” model <ul style="list-style-type: none"> ○ Tips for building and maintaining customer relationships ○ Suggestions for communications and contacts Customer’s business (Task to follow workshop) <ul style="list-style-type: none"> • <i>Research customer’s goals in Performance Plan, MIT report, strategic plan, etc.</i> • <i>Identify 1 or 2 discussion topics (or potential areas of need) to discuss with customer</i> 	<ul style="list-style-type: none"> • Stephen 	<ul style="list-style-type: none"> • 45 min.
BREAK			
FSAU Products & Services	<ul style="list-style-type: none"> • Review communications team list of products and services 	<ul style="list-style-type: none"> • Anita 	<ul style="list-style-type: none"> • 15 min.
Needs Assessment	<ul style="list-style-type: none"> • Overview of the process • <i>Role play</i> • Review needs assessment approach and techniques document (including interview protocol) • Provide tool(s) for interviews 	<ul style="list-style-type: none"> • Katie 	<ul style="list-style-type: none"> • 45 min.
BREAK			



Sunday, November 24, 2002

Proposal process	<ul style="list-style-type: none">• How to create a proposal• Description of the review board concept	<ul style="list-style-type: none">• Stephen	<ul style="list-style-type: none">• 20 min.
Preview of Phase 2	<ul style="list-style-type: none">• High-level overview of the next phase• Facilitation and metrics	<ul style="list-style-type: none">• Stephen	<ul style="list-style-type: none">• 15 min.
Marketing strategy	<ul style="list-style-type: none">• Review and identify opportunities• Conduct basic information walk-through with primary customers• Maintain record of conversations• Conduct needs assessment	<ul style="list-style-type: none">• Katie	<ul style="list-style-type: none">• 15 min.
Meeting Evaluation	<ul style="list-style-type: none">• Review Desired Outcomes• Determine next meeting date/ time• +’s and –’s of this meeting’s structure	<ul style="list-style-type: none">• Stephen	<ul style="list-style-type: none">• 5 min.