



FSA University Performance Consultant

Overview workshop
May 9, 2002



Welcome

- Introduction
- Welcome
- Purpose



Desired Outcomes

By the end of this workshop, we will be able to:

- Explain the role of the performance consultant
- Identify the steps and processes involved in being a performance consultant
- Begin deploying the performance consultant role throughout FSA



Agenda

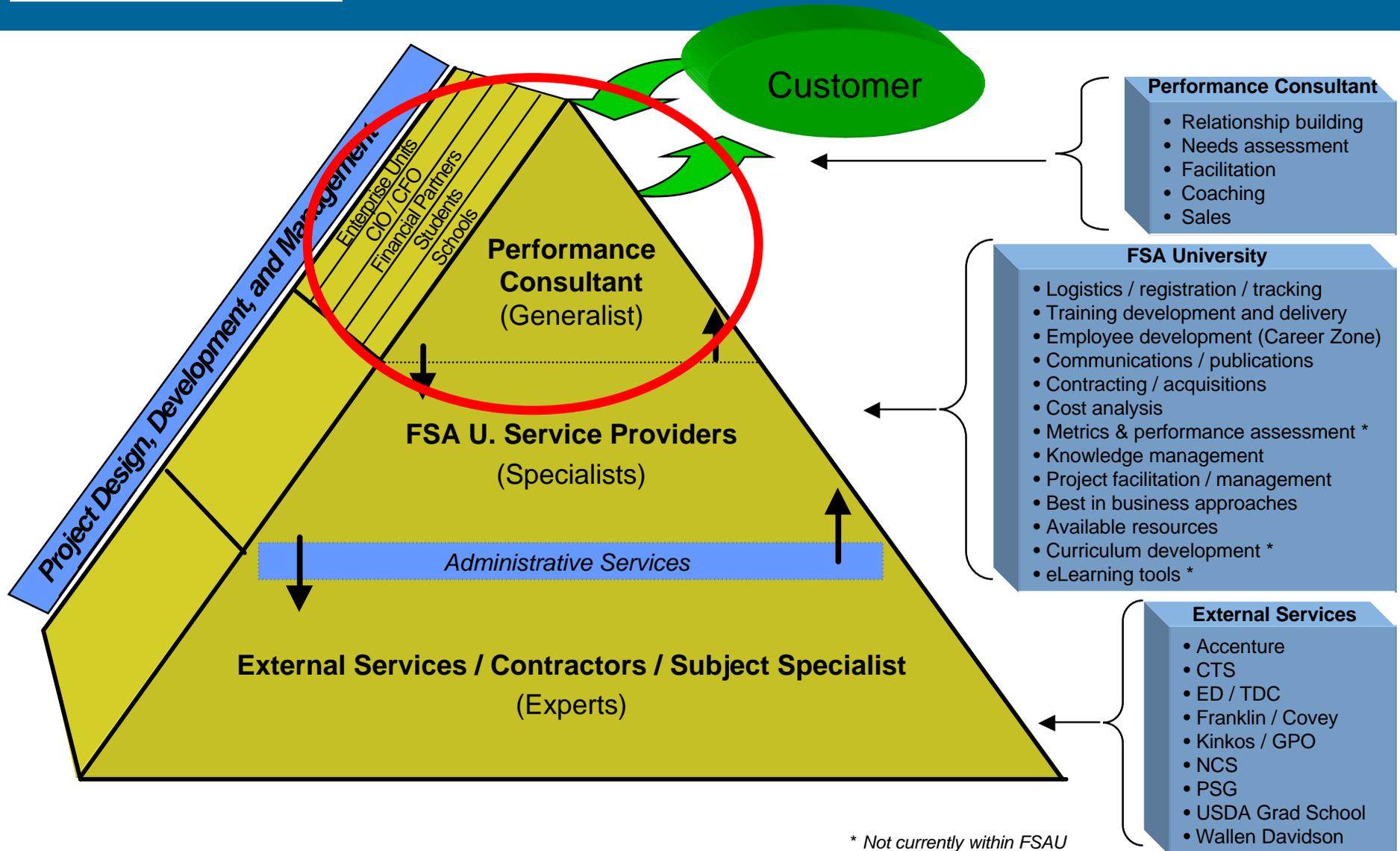
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 - Structure
 - Goals
 - Consulting cycle
 - Preparation process
- ❑ **The Customer**
 - Customer relationships
 - Customer's business
- ❑ **FSAU Products & Services**
- ❑ **Proposal development process**
 - Needs Assessment
- ❑ **Next steps**
 - Preview of Phase 2
 - Marketing Strategy



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Performance Consultant Overview





Current opportunities

What requests have you received?



Performance Consulting Goals

Goals:

- Assist FSA in improving job performance and effectiveness through training and non-training solutions.
- Position FSAU as a strategic partner in selecting and implementing performance solutions.



Performance Consulting Roles

Training

Determines if training is needed to improve performance or if something else is needed.



Gives the customer training, if training is needed.



Points the customer somewhere else, if training is not needed.

Performance Consulting

Determines WHAT is needed to improve performance.



Gives the customer training, if training is needed.

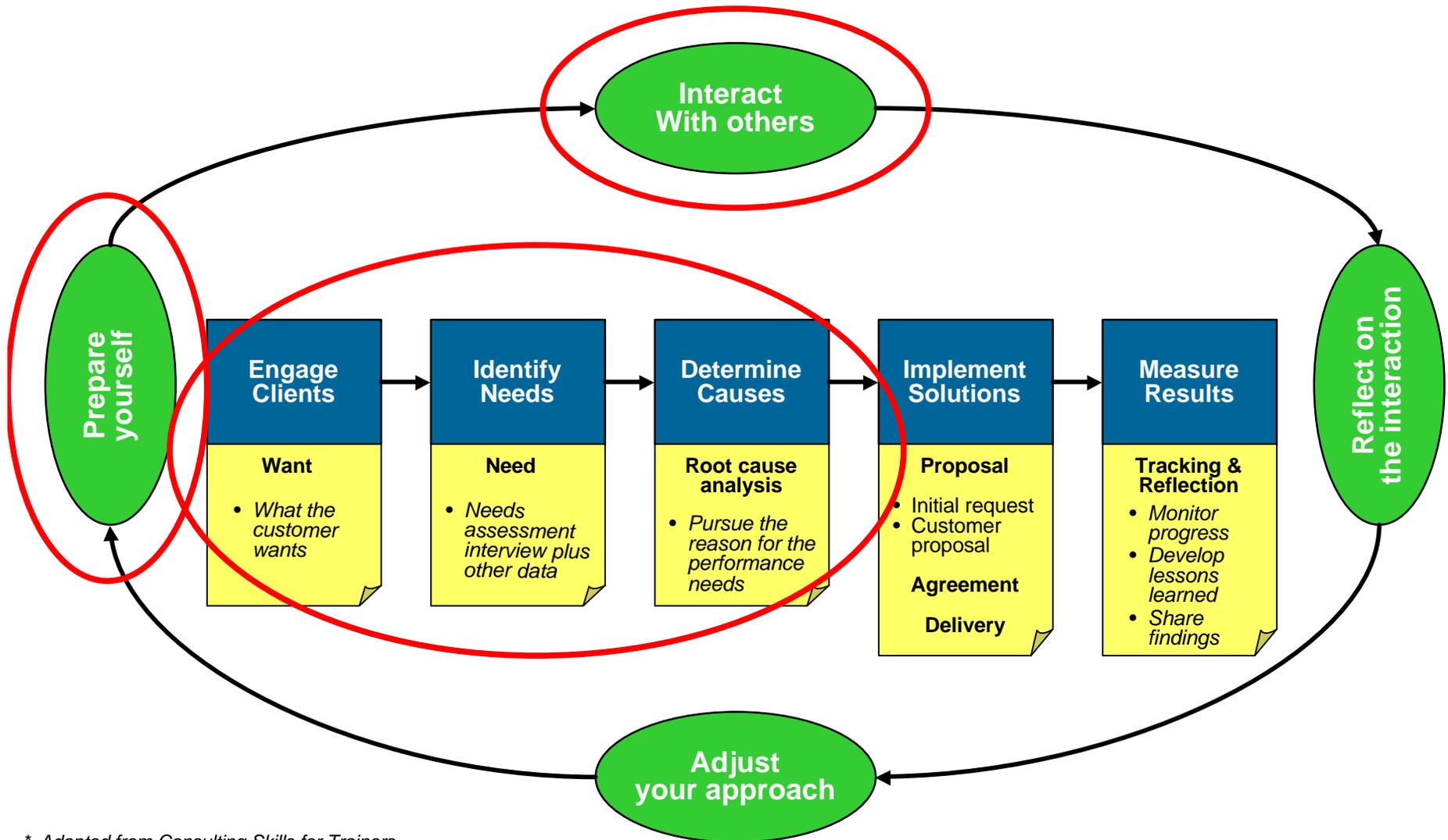


Points the customer to non-training solutions, if something else is needed to improve performance.

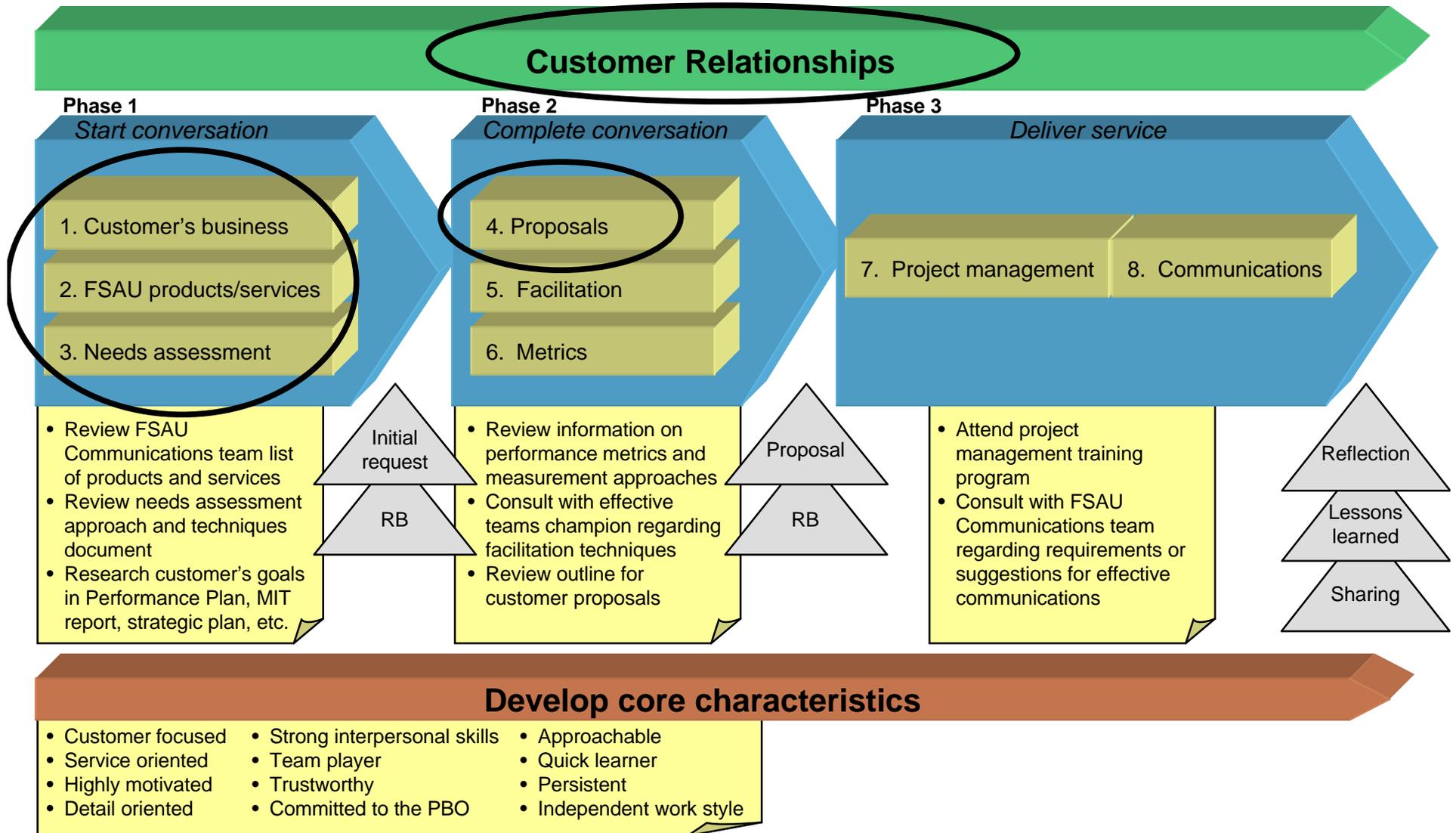


Helps the customer select and implement non-training solutions.

The Consulting Cycle



Preparation Phases





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Customer advice from FSAU's learning consultants

The Tao According to Chuck Conrad

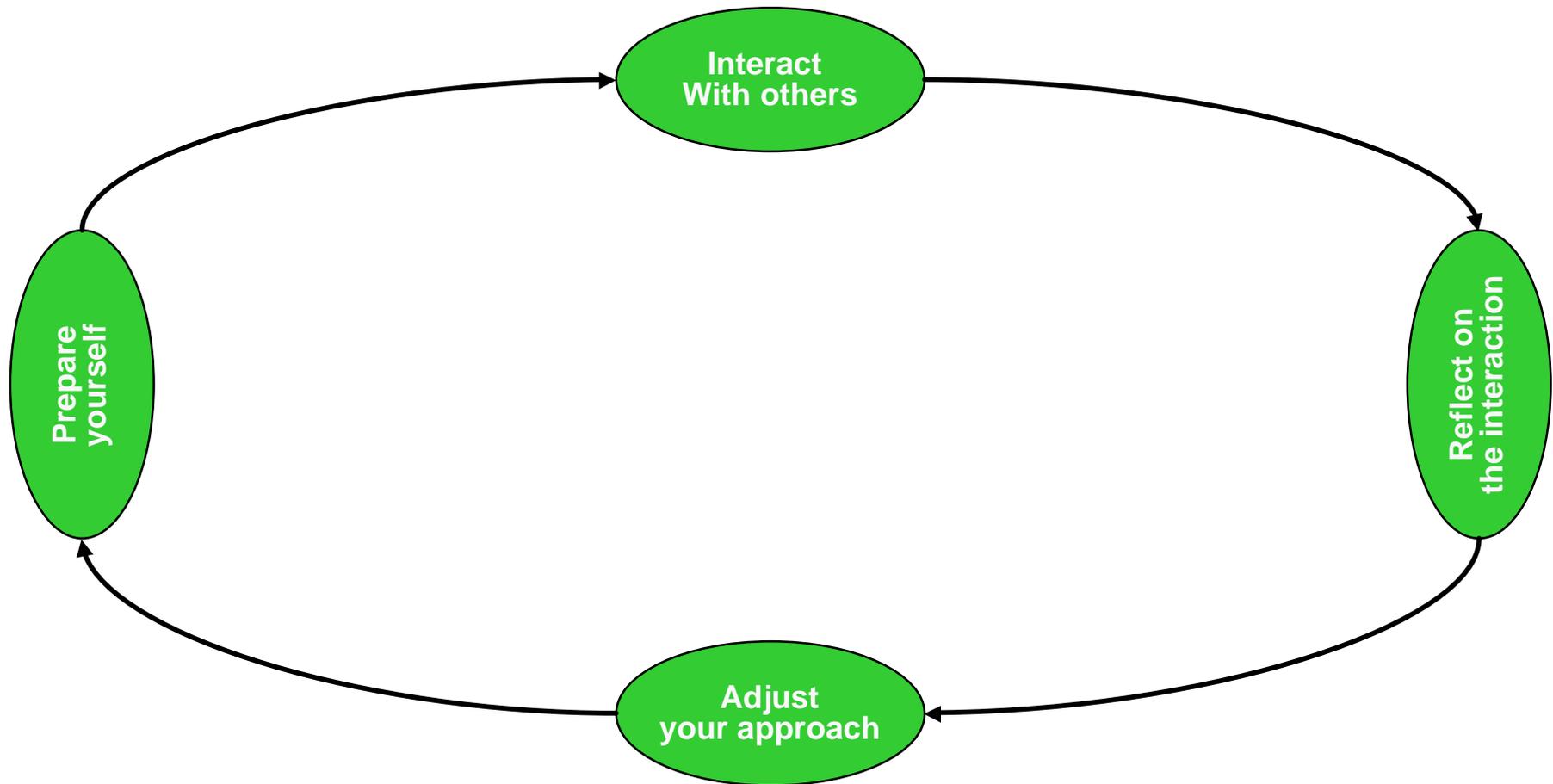
- Know your role and how far you can go so you can deliver on your promises
- Establish solid relationship(s)
- Know their business
- Probe the root cause
 - Getting them what they “want” may not make a difference
- **Don't jump the gun**



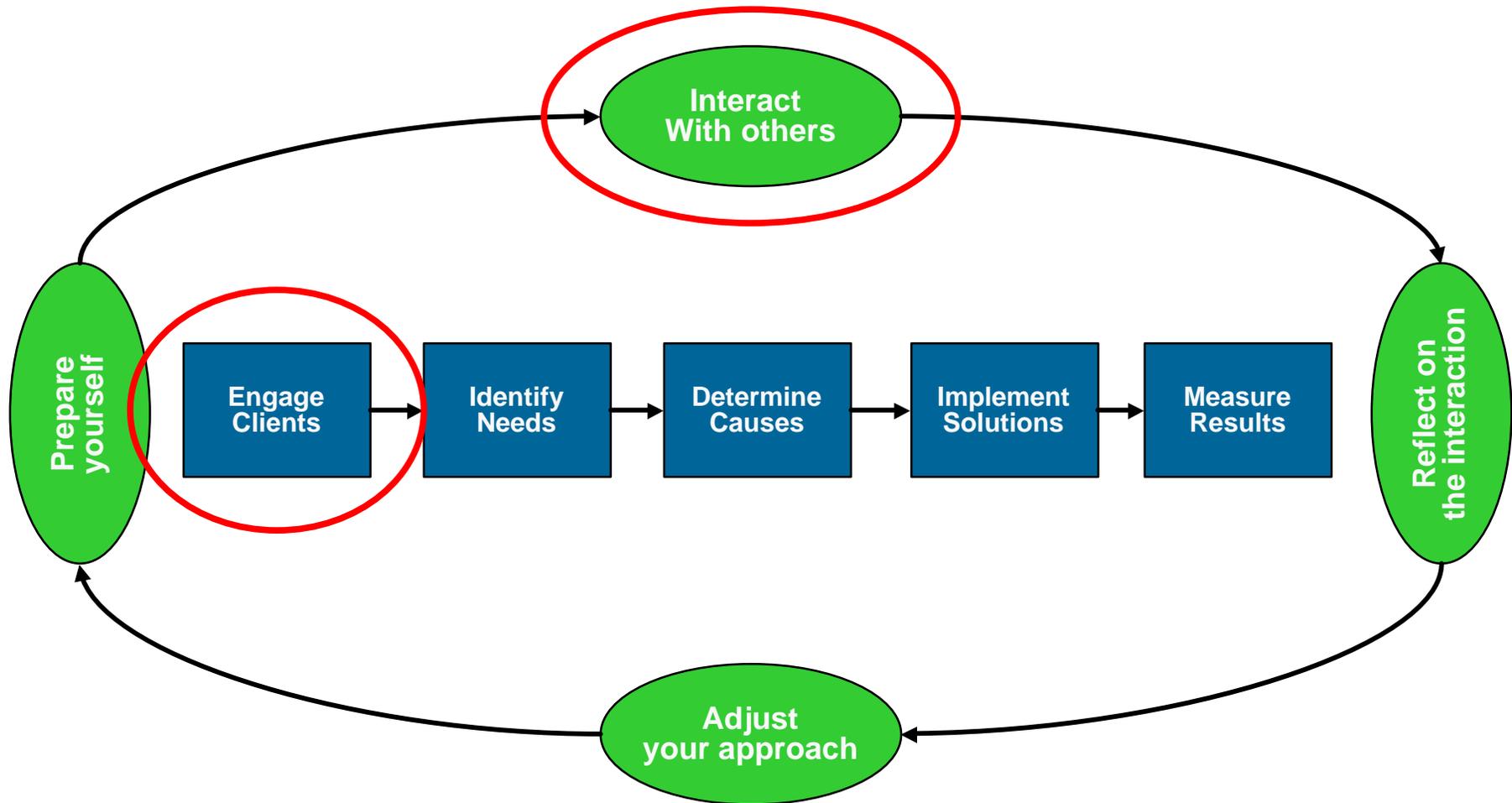
Living our standards

- **Be worthy of trust**

The Consulting Cycle



The Consulting Cycle





Living our standards

- **Be worthy of trust**
- **Be courteous**



The Customer: Customer relationships

Key success factors include:

- Develop and maintain a solid understanding of the organization's business functions and processes.
- Establish a common ground with the customer.
- Follow through on everything you say you will do.
- Stay within your area of expertise. Seek help when you are unsure.
- Take the time to understand the customer's reality.
- Focus on the situation, not on the customer's personality.
- Specify that the relationship is one of collaborative analysis and decision-making.
- Focus on what is to be gained from the interaction.
- Share responsibility for success or failure.
- Set common goals for each stage of the consulting process.
- Maintain openness to the customer's suggestions.
- Review the work progress and the relationship at the end of each stage before moving to the next.
- Express what you are experiencing with the customer as you work.

Remember:

- Don't argue – present an alternative viewpoint.
- Stay non-judgmental.
- Realize that trust, credibility, and respect are the results of good work – do it and it will come.



The Customer: Know the customer's business

Who are they? What do they do?

**To build a strong relationship with the customer,
know the customer's business.**

Resources to help us achieve this goal include:

- President's Management Agenda
- Management Improvement Team (MIT) Report
- Performance Plan
- Modernization Blueprint
- Weekly reports
- ***You: Your knowledge and experiences***



Living our standards

- **Be worthy of trust**
- **Be courteous**
- **Delivery great products & services**
- **Be efficient**



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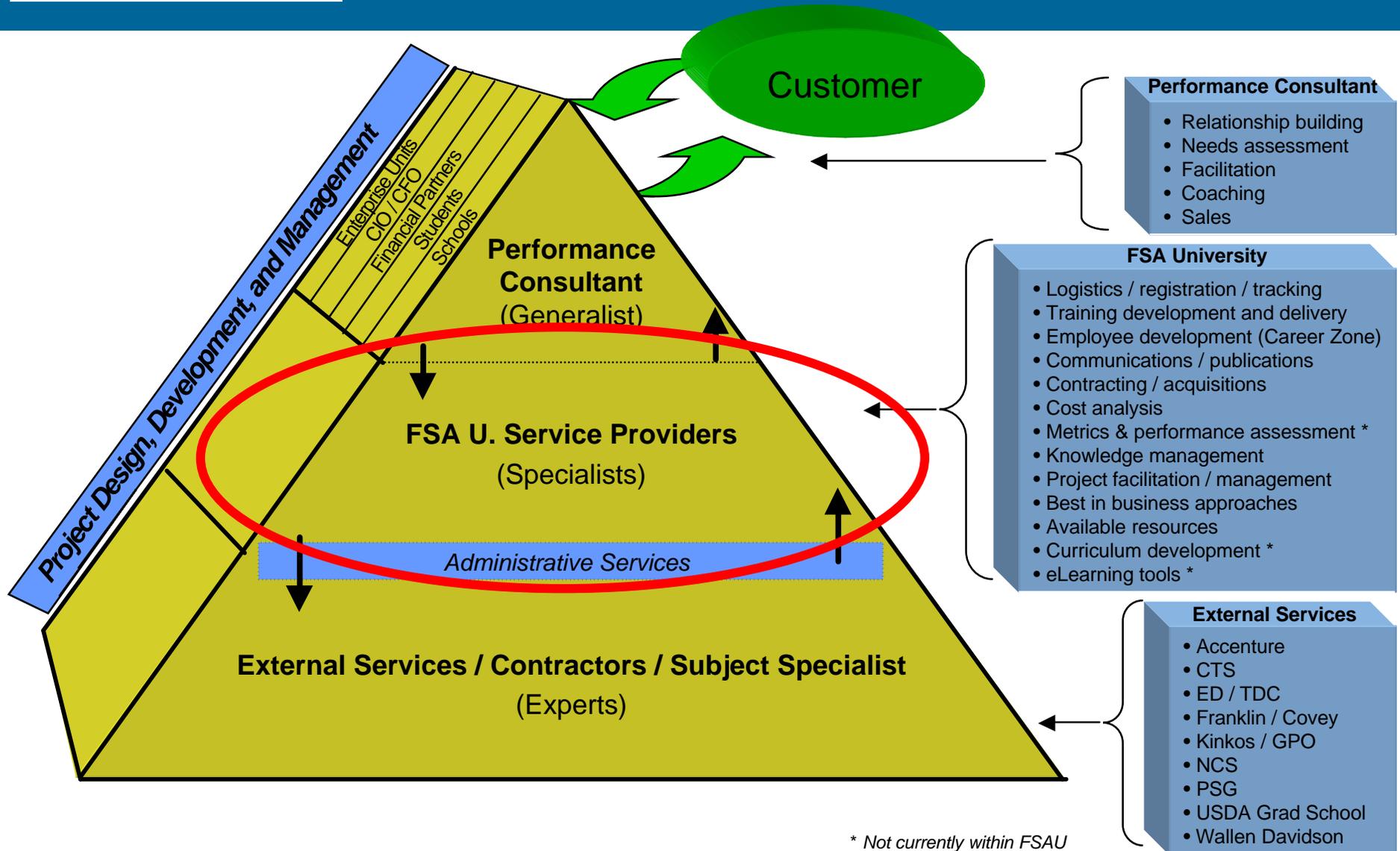
BREAK



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Performance Consultant Overview





FSAU Products & Services

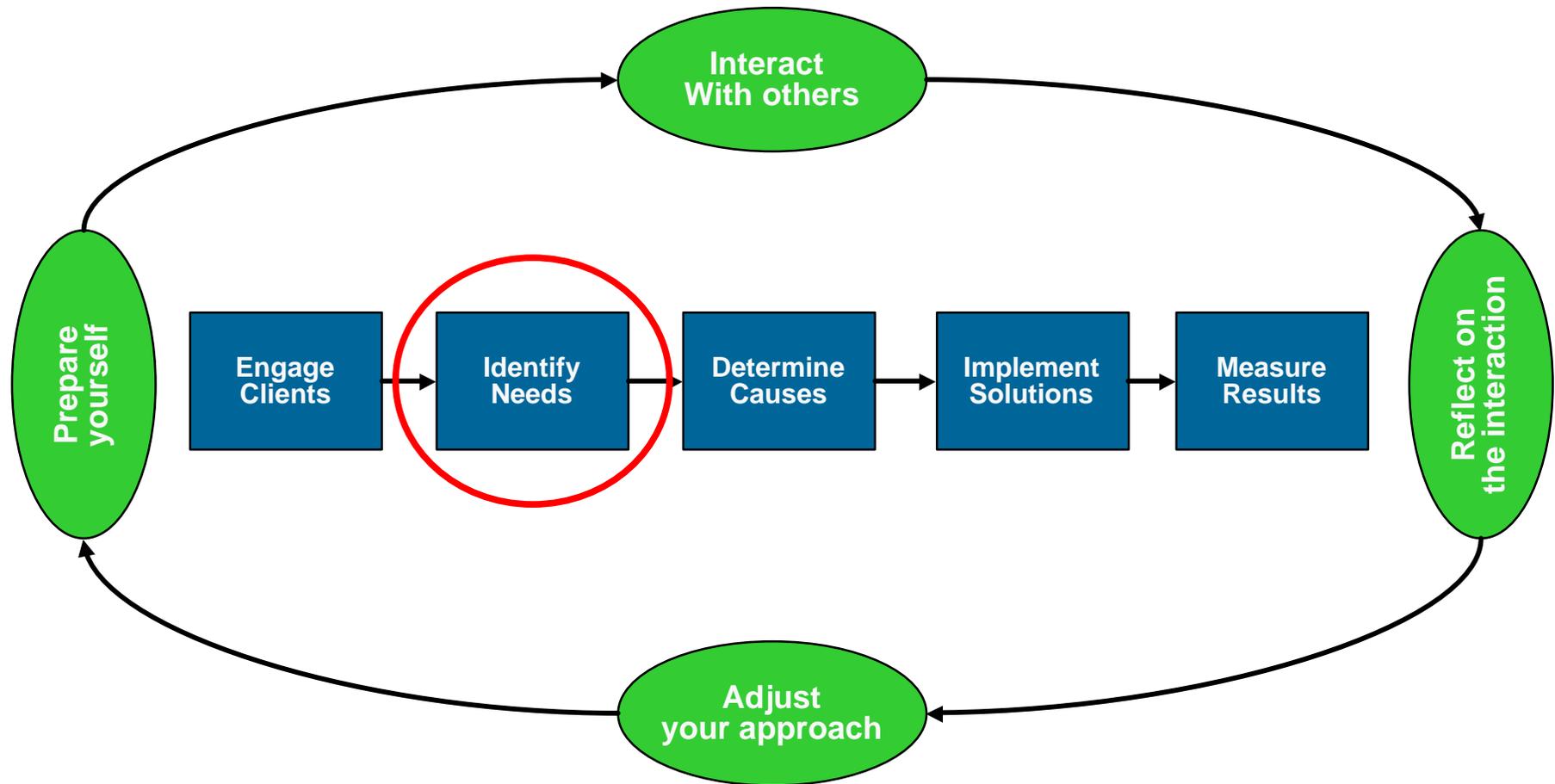
Who are we? What do we do?



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The Consulting Cycle





Proposal Development Process

Who are they? What do they do?

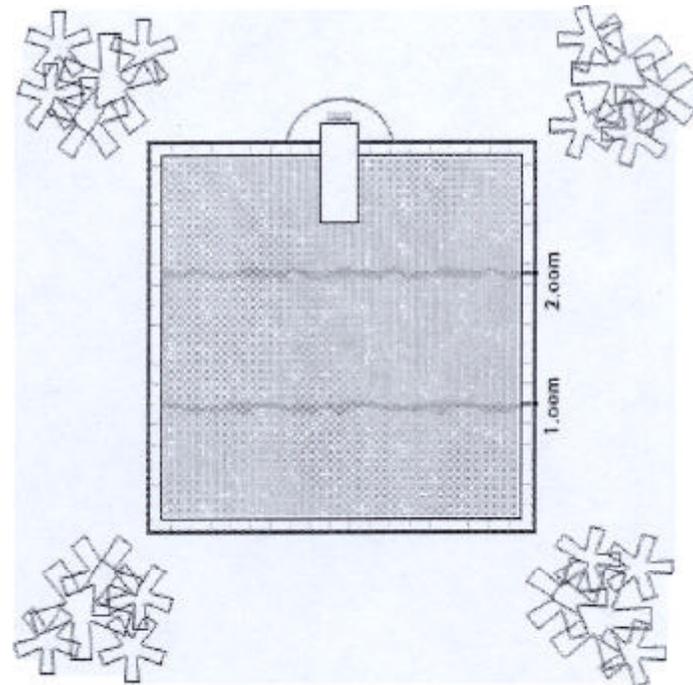
Who are we? What do we do?

How do we link what they do to what we do?

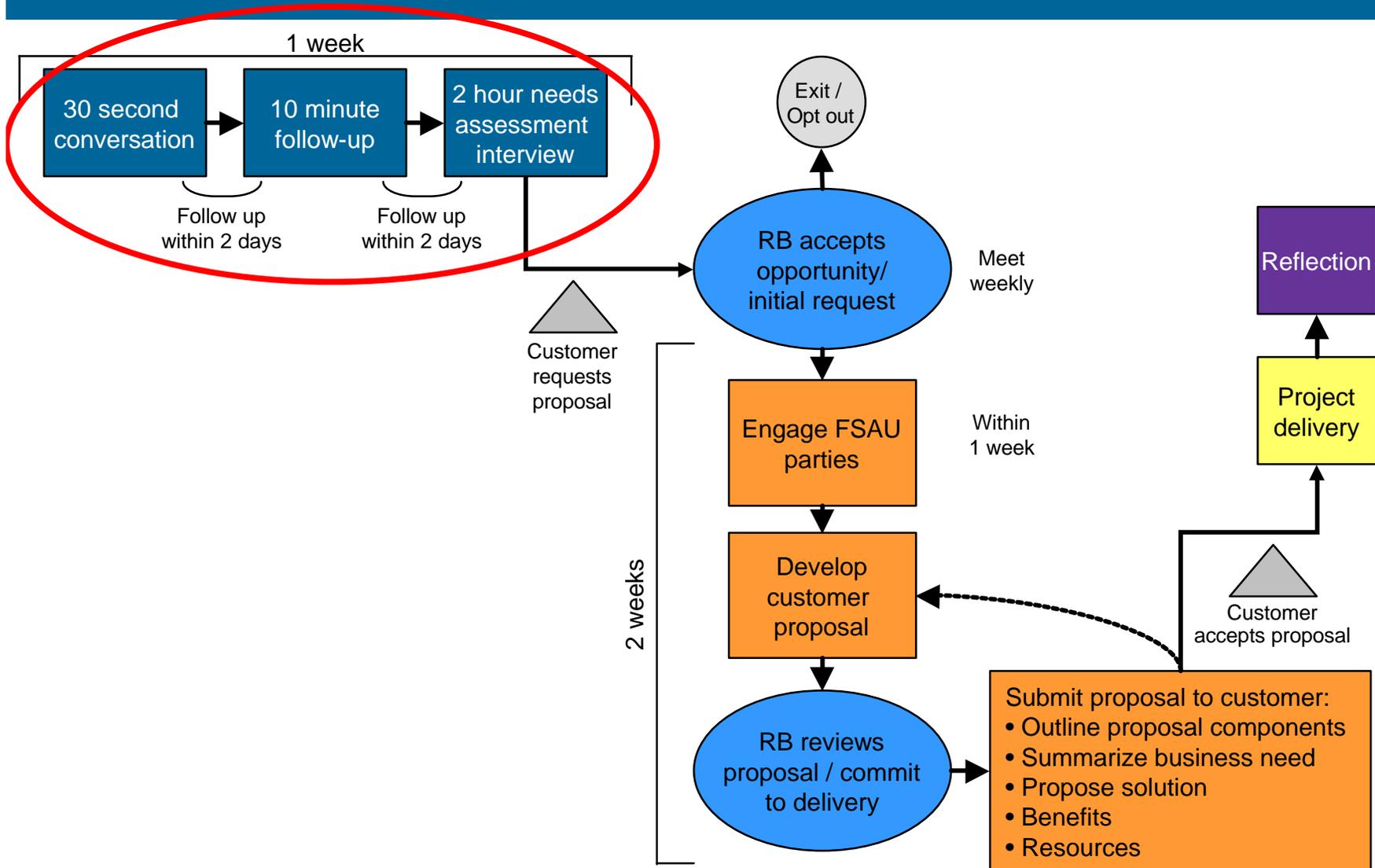
Activity: Swimming pool

A man has a swimming pool in his garden situated between four beautiful oak trees. He's disappointed with it and wants to double its size and keep it square. On the other hand, he doesn't want to cut down the trees.

Can it be done? If so, how?



Proposal Development Process





Needs Assessment

Example

<u>Step</u>	<u>Results</u>	<u>Information / Tools</u>
30 second conversation	<ul style="list-style-type: none">• Come talk to me• Invitation to keep an open mind	<ul style="list-style-type: none">• Understanding of team's target performance

<u>Step</u>	<u>Results</u>	<u>Information / Tools</u>
10 minute follow-up	<ul style="list-style-type: none">• Recognition of performance need• Recognition that FSAU may help	<ul style="list-style-type: none">• Understanding of team's target performance

<u>Step</u>	<u>Results</u>	<u>Information / Tools</u>
2 hour needs assessment interview	<ul style="list-style-type: none">• Partner for solution• FSAU can help• FSAU will develop proposal for solution	<ul style="list-style-type: none">• Interview protocol





Needs Assessment Step 1: 30 second discussion

<u>Step</u>	<u>Results</u>
30 second conversation	<ul style="list-style-type: none">• Come talk to me• Invitation to keep an open mind
10 minute follow-up	<ul style="list-style-type: none">• Recognition of performance need• Recognition that FSAU may help
2 hour needs assessment interview	<ul style="list-style-type: none">• Partner for solution• FSAU can help• FSAU will develop proposal for solution

An initial conversation indicates an opportunity within a team or business unit. This may occur casually, as on an elevator. It may also surface in a discussion of other matters or result from a presentation about FSAU's services and offerings. Since this may arise without provocation, its main purpose is to recognize the opportunity and, subsequently, initiate a fuller conversation about performance needs.

Inquire about performance needs:

- How are you doing on ___?
- What new things are you doing?

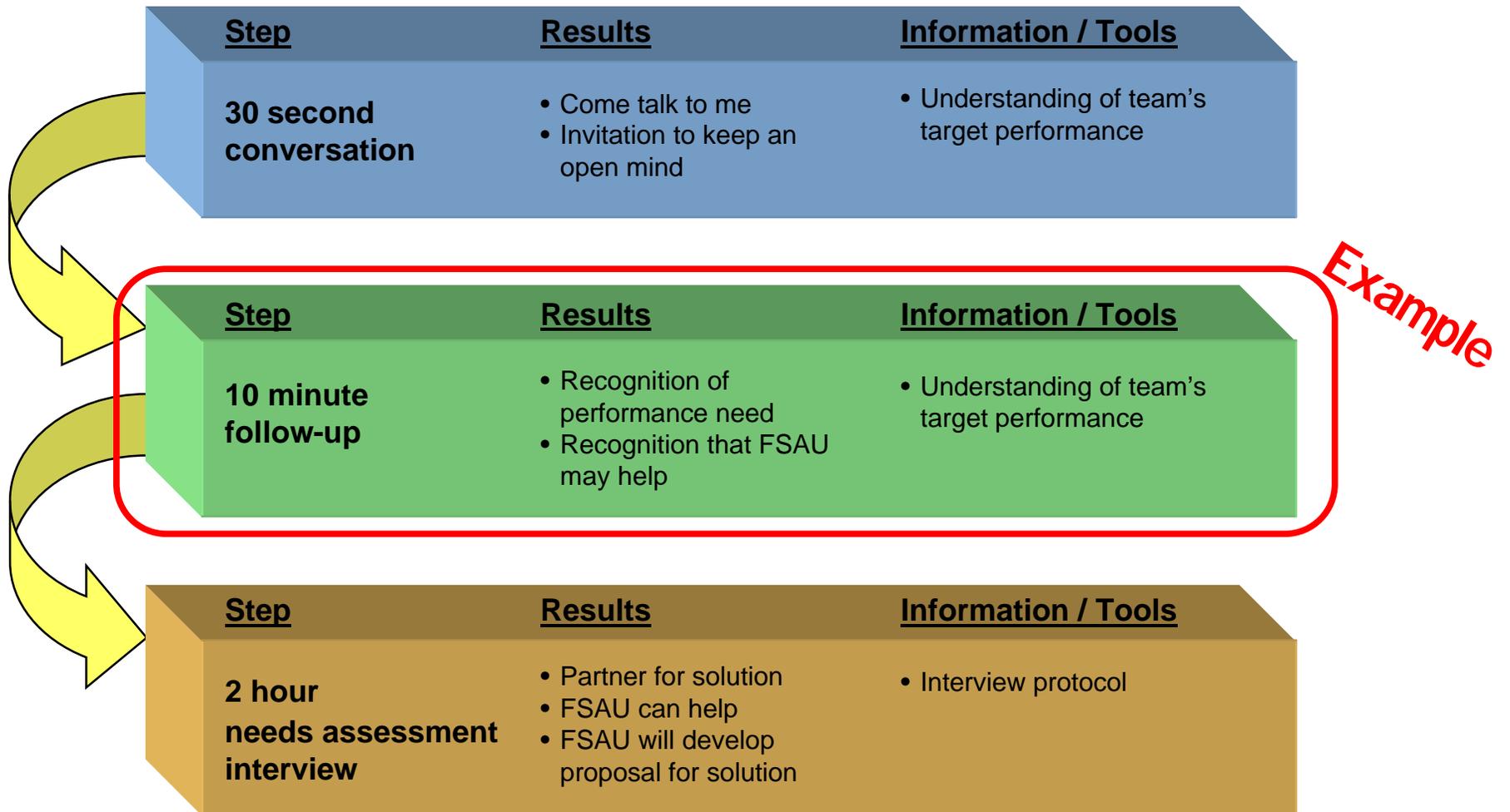
Provide basic information about how FSAU can help:

- Validate need
 - Acknowledge the performance need as stated
- Establish credibility
 - Explain what FSAU does, particularly in that area
- Define / Broaden scope
 - Apply FSAU's offering to the stated need

Observe



Needs Assessment





Needs Assessment Step 2: 10-minute follow-up

<u>Step</u>	<u>Results</u>
30 second conversation	<ul style="list-style-type: none">• Come talk to me• Invitation to keep an open mind
10 minute follow-up	<ul style="list-style-type: none">• Recognition of performance need• Recognition that FSAU may help
2 hour needs assessment interview	<ul style="list-style-type: none">• Partner for solution• FSAU can help• FSAU will develop proposal for solution

This update could be offered in a variety of formats, including a phone call, e-mail, or walk-by meeting. Its purpose is to gather more information about the customer's needs, encourage customers to think about the ongoing work of the organization, and solidify FSAU's role as the appropriate solution provider. At this stage, the goal is to encourage the customer to consider these ideas and concepts, to push the customer's thinking about the performance needs.

Probe for more information

- Begin by restating the information gathered in the earlier conversation
- "As I was thinking about what we discussed..."

Develop a better understanding of the issues and goals

- What's on the team's agenda?
- What's the situation?
- What are the primary concerns?

Ask high-level interview questions (Answers to be considered for next discussion)

- What is the team's target performance?
- What is the team's current performance?
- What are the gaps/needs?

Question



Needs Assessment

<u>Step</u>	<u>Results</u>	<u>Information / Tools</u>
30 second conversation	<ul style="list-style-type: none">• Come talk to me• Invitation to keep an open mind	<ul style="list-style-type: none">• Understanding of team's target performance

<u>Step</u>	<u>Results</u>	<u>Information / Tools</u>
10 minute follow-up	<ul style="list-style-type: none">• Recognition of performance need• Recognition that FSAU may help	<ul style="list-style-type: none">• Understanding of team's target performance

<u>Step</u>	<u>Results</u>	<u>Information / Tools</u>
2 hour needs assessment interview	<ul style="list-style-type: none">• Partner for solution• FSAU can help• FSAU will develop proposal for solution	<ul style="list-style-type: none">• Interview protocol

Example



Needs Assessment Step 3: 2-hour interview

<u>Step</u>	<u>Results</u>
30 second conversation	<ul style="list-style-type: none">• Come talk to me• Invitation to keep an open mind
10 minute follow-up	<ul style="list-style-type: none">• Recognition of performance need• Recognition that FSAU may help
2 hour needs assessment interview	<ul style="list-style-type: none">• Partner for solution• FSAU can help• FSAU will develop proposal for solution

Before proceeding to this phase, it is important to understand FSA University's core products and services as well as to know the customer's business. After collecting initial data in steps 1 and 2, conduct an interview with the customer to assemble more detailed information. After this interview, FSAU will propose potential solutions to assist with identified needs.

The needs assessment interview covers, in greater detail, the following areas:

- Target performance
- Current performance
- Gaps between target and current performance, thus identifying areas of need
- Root cause(s) of the gaps and resulting performance needs
- Information to identify potential solutions to address performance gaps/needs

Discussion topics:

- What's on the team's agenda?
- What is the target performance (of the work unit / project team)?
- What is the current performance (of the work unit / project team)?
- What are the gaps / needs? (If any)
- What are the best means to achieve the target performance/goals?
- How will the team measure success?

Consider the possibilities



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BREAK

Activity: Light bulbs

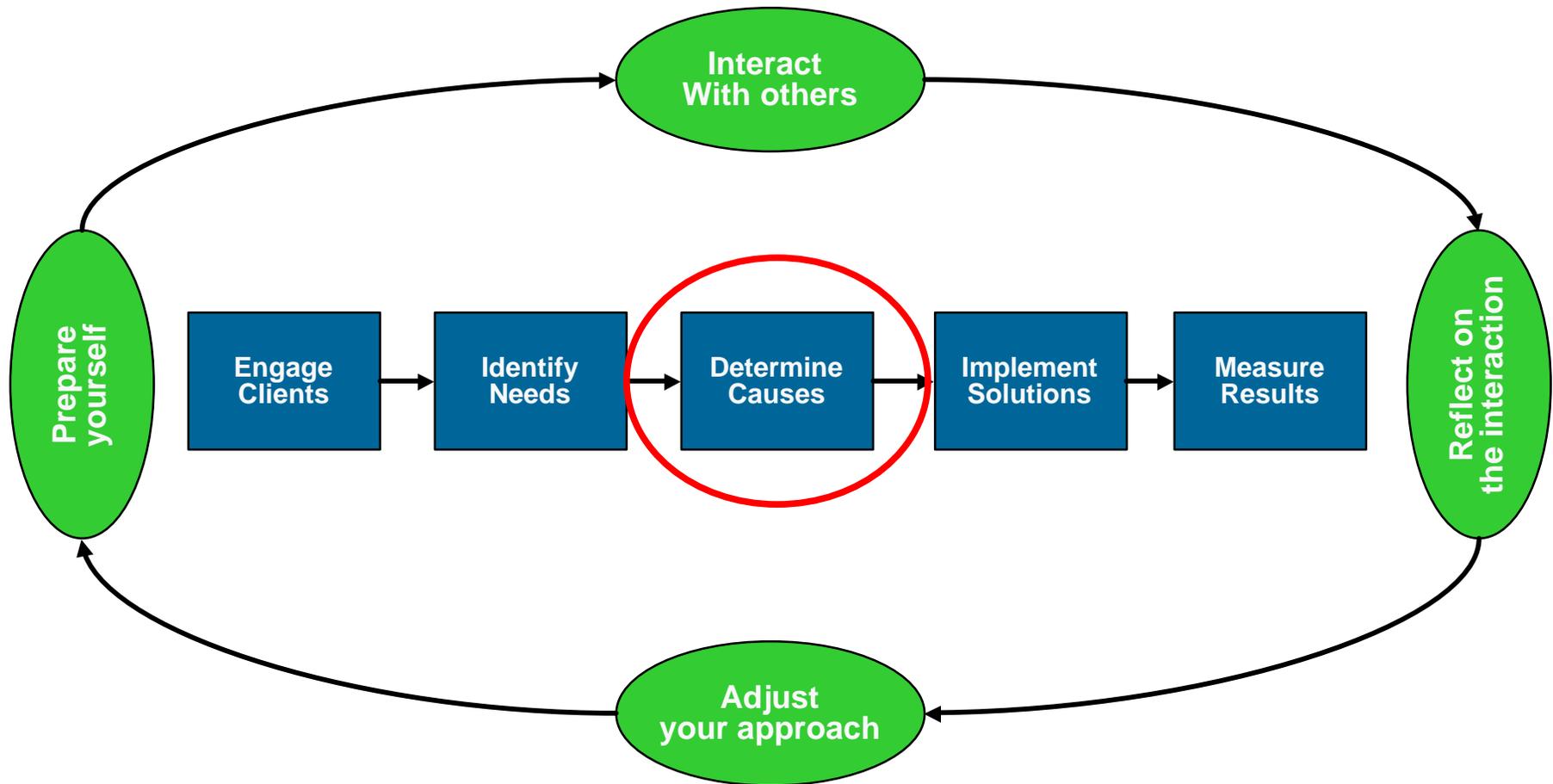
In your cellar, there are three light switches in the OFF position.

Each switch controls 1 of 3 lights bulbs on the floor above. You may move any of the switches, but you may only go upstairs to inspect the bulbs one time.

How can you determine the switch for each bulb with one inspection?



The Consulting Cycle





Gap Analysis

Target performance - Current performance

= *Performance gap*



Root Cause Analysis

To determine what customers need, rather than want, explore the root cause. Techniques include Five Whys, Fishbone Diagram, Idea Sort, and Chronology. For example, the following is an explanation of the Five Whys technique.

When to use it

- To further examine or analyze a suspected cause.
- To isolate the causes that need to be addressed.

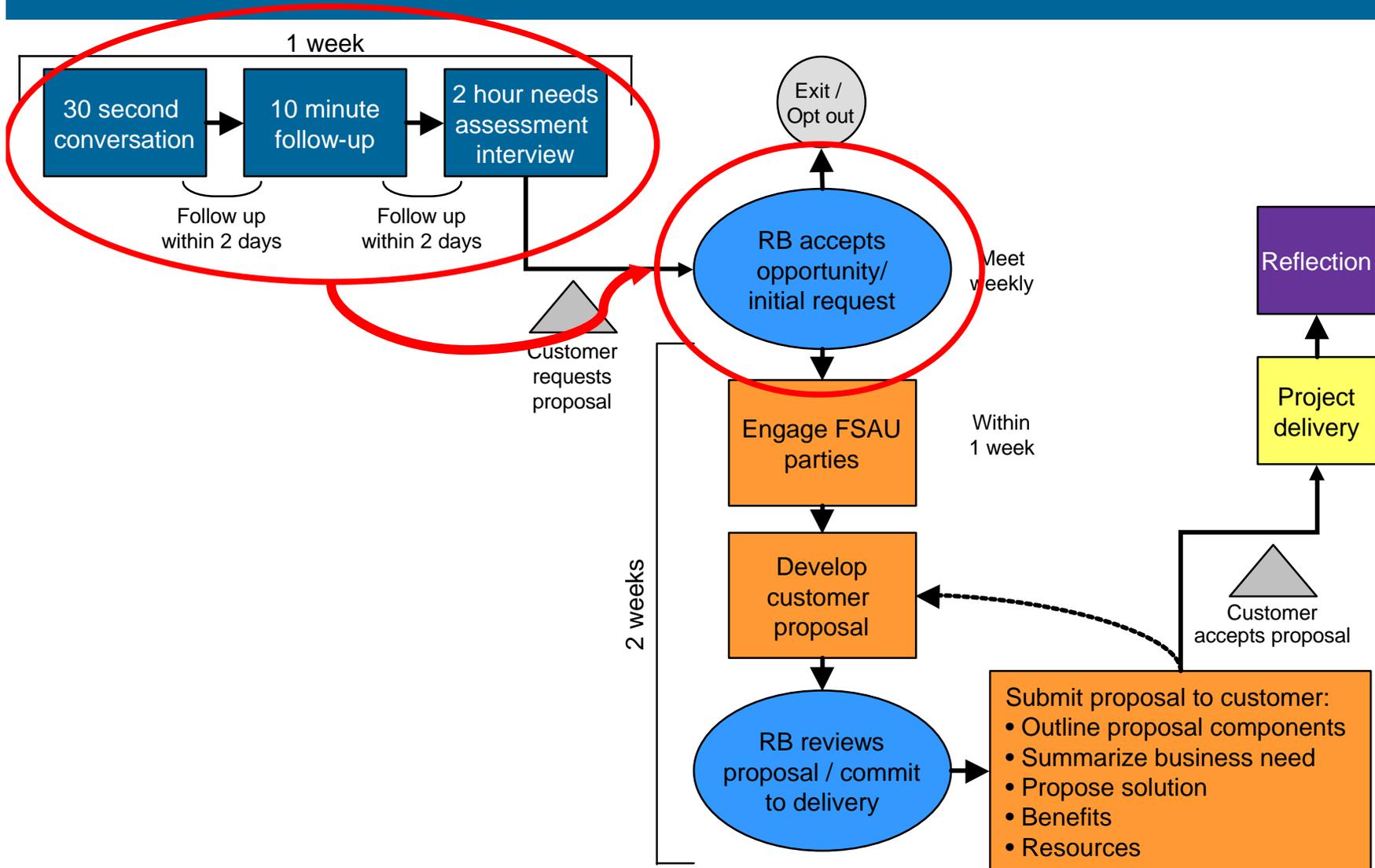
Steps

1. Write a statement of the performance gap.
2. List the causes you suspect are contributing to the performance gap.
3. State the performance gap as a “why” question.
4. Record a response starting with “Because.”
5. Examine the response and ask, “Why is that?”
6. Record a response starting with “Because.”
7. Repeat steps 5 and 6 to “dig deeper” until you have asked five consecutive “why” questions.

Tips

- You don't always have to ask “why” five times.
- You may go “full circle” only to come back to the original statement. This is likely an indication that the gap you identified is not the “true” gap but rather a symptom of it.
- You may find that the answer to the last “why” question is the same as the answer to the previous “why” question. This may be a further indication of the cause.

Proposal Development Process





Initial Request

FSAU Proposal Request Form

Team / Unit		
Span car(s)		Primary contact(s)
Contact phone number		Date submitted
Please answer the following questions to formally initiate the proposal development process.		
Question	Please enter your response in this column	
1. What is the duration? Please provide a brief description of the performance issue or request.		
2. What does the audience want? Explain the reason for the request.		
3. What are the intended outcomes? Describe what the team/unit wishes to achieve.		
4. Who is the target audience? Use a customer group(s) for whom the performance solution is intended.		
5. Who are the stakeholders? Use individuals and groups affected by the potential solution. Examples include sponsors, channel representatives, etc.		
6. What are the considerations? Use considerations affecting potential performance solutions. Examples include audience diversity, cost, and delivery constraints / requirements.		
7. Required timeframe When should the solution be deployed?		
8. POC's recommendations Please note the performance consultant's recommendations.		
9. FSAU action Indicate the course of action determined by FSAU to assist with this request.		

DRAFT

The initial proposal request provides basic data for the Review Board's consideration, including:

General information about the request

Identified audience groups and stakeholders

Delivery considerations, recommendations, and actions



Review Board

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

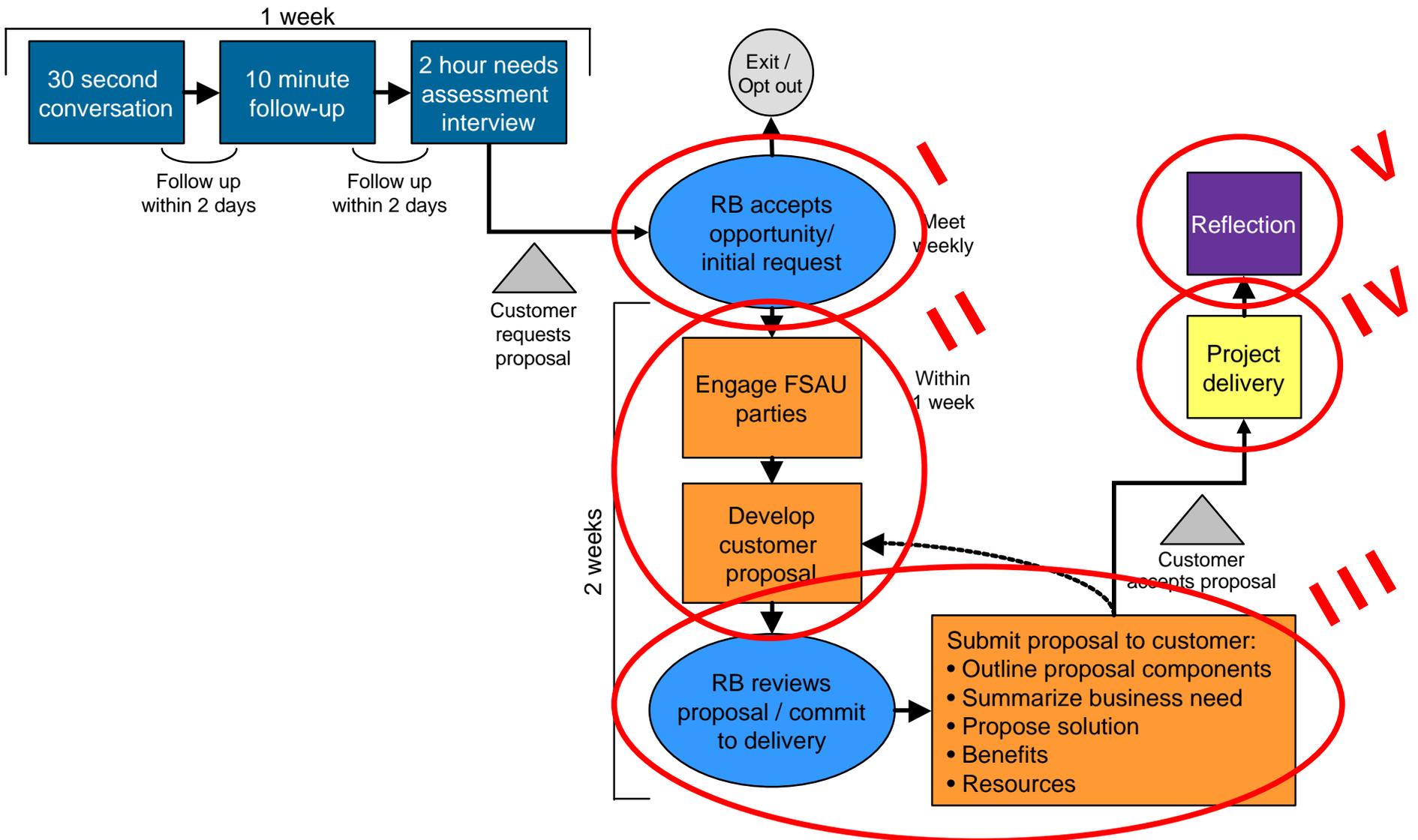
IV. Project oversight

- 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

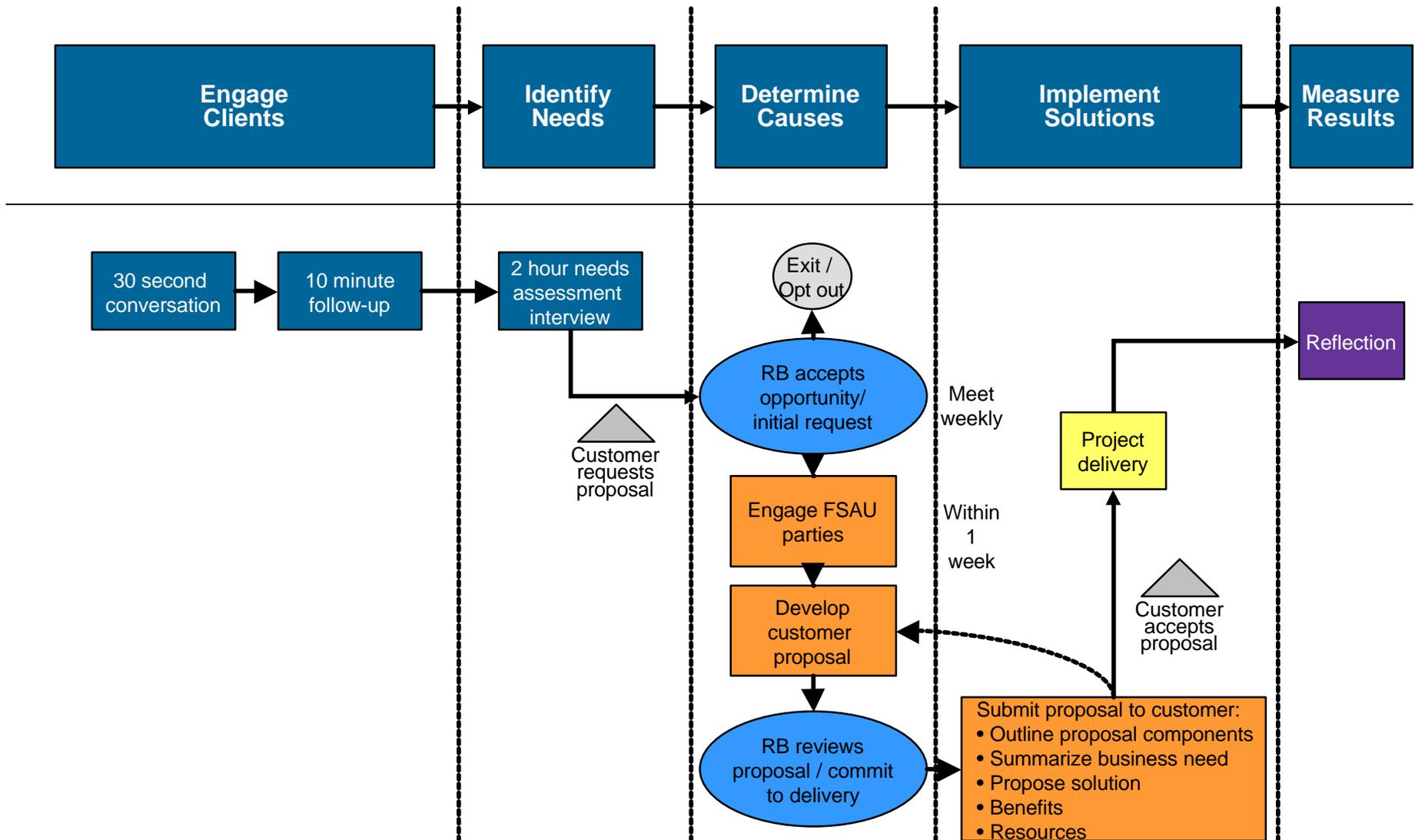
- Feedback from the customer
- Lessons learned
- Thoughts for future opportunities

Proposal Development Process





Consulting Cycle & Proposal Development Process

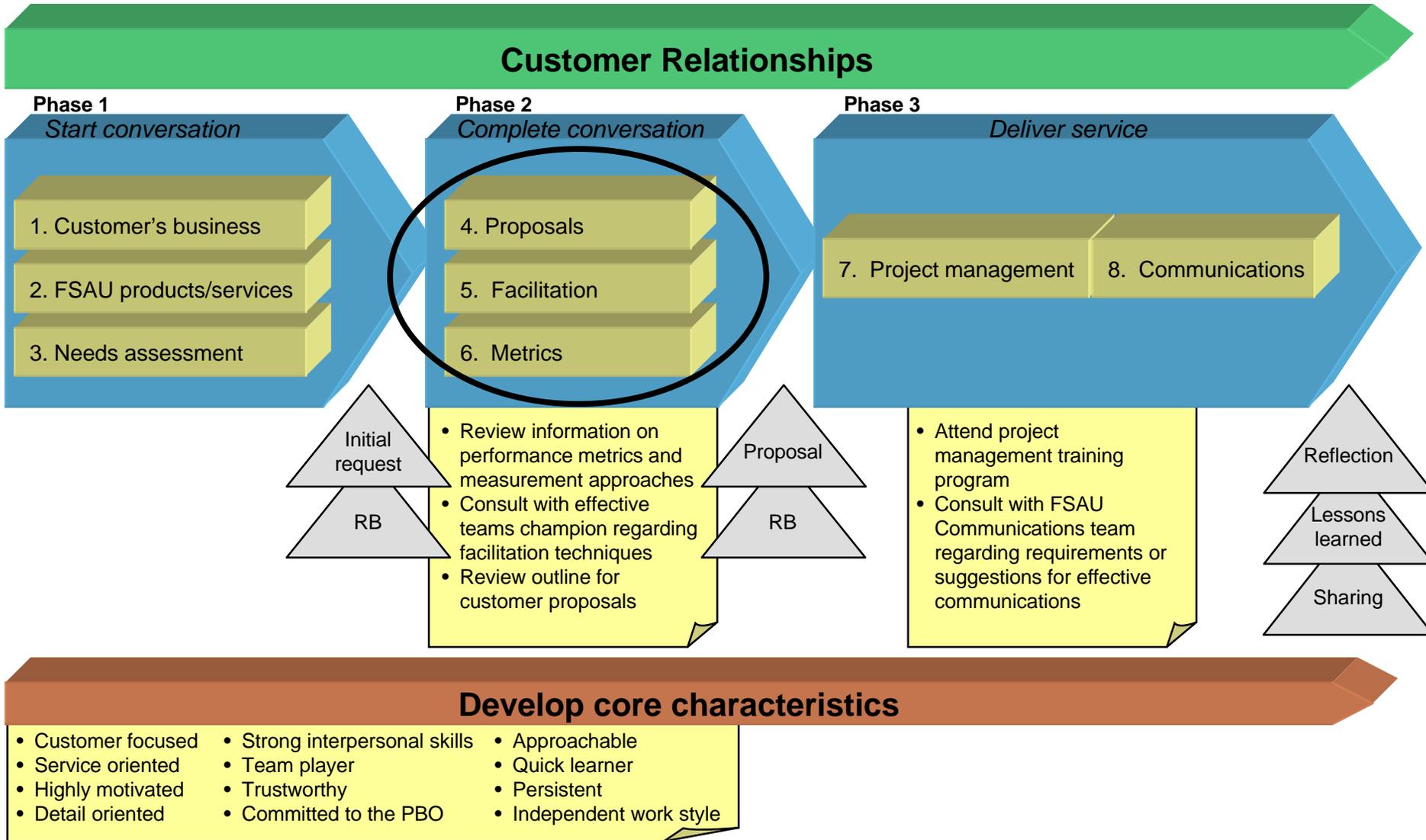




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Preview of Phase 2





Marketing strategy

- ❑ **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)**



Activity: Matches

Using two matches, create a square.





Next steps

- ❑ **Schedule next sessions**
- ❑ **Select “territory”**
 - Identify opportunities
 - Review customer information
 - Consult with scorecard team reps
 - Conduct “walk about”
 - What else?
- ❑ **Select “adjunct faculty”**
- ❑ **Identify areas of concern/learning**



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- **Don't jump the gun**



“Why Don’t You Want What I Want?”

Strive to have the customer say:

- **I get it**
- **I like it**
- **I like you**



Session evaluation

