

RTM Consulting

Soft Skills: The True Life-Blood of a Healthy PS Organization

A Guide to Developing a Well-Rounded PS Staff

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SOFT SKILLS: THE TRUE LIFE-BLOOD OF A HEALTHY PS ORGANIZATION

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BACKGROUND

Professional Services Organizations are often quite proud of the technical expertise of their personnel – and deservedly so. It is common to hear things such as “Sue is the best technical architect – there is nothing she cannot do with this product.” At the same time, how many of us have seen situations where the great technical resource:

Rubs the client the wrong way?

Does not proactively close out issues with a client?

Cannot seem to effectively communicate key messages?

Avoids identifying up-sell opportunities?

In this whitepaper, I will explore what the PS organization can do to enhance the “soft skills” of its PS practitioners and ultimately drive more value to both the client and the PS organization.

WHY IS THIS A PROBLEM?

The key to this issue is related to the “Customer Experience.” Anyone who has been in a retail environment in the past two decades has gone through a designed customer experience; take Starbucks for example. The customer experience is designed by Starbucks to satisfy the various attributes its customers enjoy.

The concept of a customer experience is no different in the business to business environment. As your professional services resources are deployed in the field, they are not simply performing technical tasks. Rather, they are: 1) the face of your company to the end client; 2) your eyes and ears into new opportunities for your company’s software and services; and 3) creating a lasting impression (good or bad) in the minds of current and future buyers.

So, while your recruiting process identified great technical talent, and your training programs educated the new hires on the intricacies of your product, it is very likely that you have not prepared your professional services resources to effectively operate and interact with the most important people to your business: your customer.

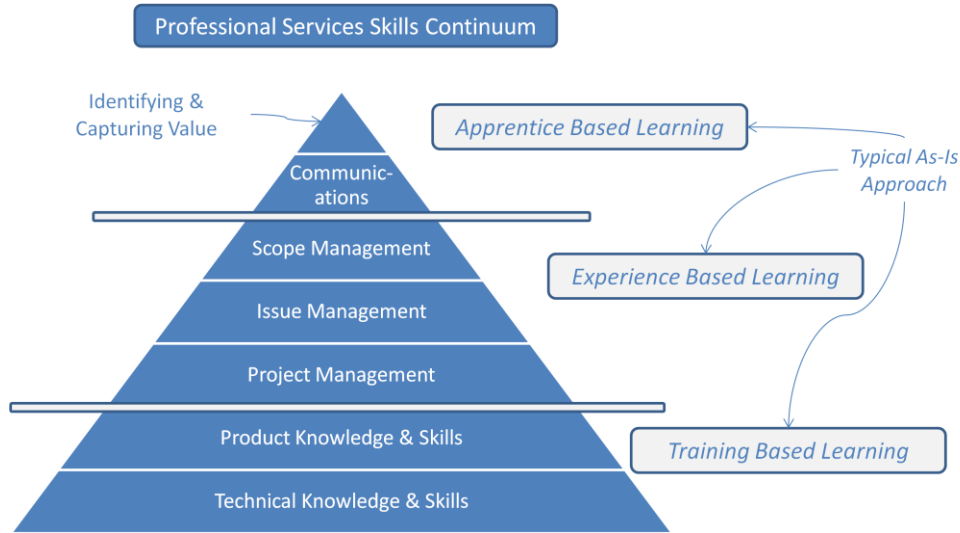
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DEVELOPING A WELL-ROUNDED PS STAFF

The pyramid is an often discussed shape in the consulting and professional services industry. As RTM Consulting thinks about developing professional services practitioners, the pyramid is an apt metaphor.



TYPICAL SKILL CONTINUUM DEVELOPMENT

As PS practitioners enter an organization, they typically come with the requisite Technical Knowledge and organizations will then train them on their specific Product. The training is very often well thought-out and extremely thorough. As it should be – no one wants to put someone without a depth of product knowledge in front of the customer.

As practitioners develop and get staffed on a variety of projects, they start to pick up skills based on experience. They see how project managers operate, how to put together a work plan, and how to address an issue. Additionally, they are handed templates for issue management and status reporting. In effect, they learn by doing. Generally they do a decent job, but in reality, it is a little bit of luck that determines who succeeds and who does not.

Lastly, for those practitioners that keep developing skills, if they are fortunate, they will find a mentor that can help them truly become a “trusted adviser” to their client. The nuances of communication these folks develop help them navigate difficult situations; explain difficult and challenging topics to a client in a way that the client not only understands the issue, but also the implications. Additionally – and more importantly – mentors help these fortunate few practitioners understand how to identify and capture value. Yes the word dreaded by many PS practitioners: *SELLING*. Not selling in a used car sort of way, but rather, identifying client pain points and opportunities that your software and services can address.

PROACTIVE SKILL DEVELOPMENT

The challenge to the Traditional Skill Development approach is that it leaves too much to chance – for something that is so critical to your business. Delivering a satisfactory – if not outstanding – customer experience requires that your PS practitioners be able to address all layers of the skill continuum.

I started my career with a Big 6 consulting firm with a comprehensive training facility. Sure, I learned a great deal about technology and analytics at this facility. However, there is one key lesson I learned that which sticks with me nearly 20 years later. Bear with me while I share the story – as it points to the benefit of proactively addressing skill development.

The course was designed around “successful client relationships.” I was a young consultant, 1 or 2 years on the job, doing a “role-play” exercise with a client; keep in mind that the session was being videotaped so that my peers and I could review and critique performance. Needless to say, I walked into the client’s office: 1) aimed to please; and 2) confident that I would excel at the exercise. After the standard small talk, we got down to business.

The client explained that they were very happy with the project and the progress that the team was making. We talked about how the project was going to streamline their business processes and save them a fair bit of money. The client indicated there were a couple of more things that the application needed to do – and it would help drive further cost benefits. “Could you make sure this list gets addressed?”

“Absolutely!” I confidently replied as I walked out of the office.

Any idea how this turns out? All of my peers and I failed miserably at achieving the real goal. I had just agreed to perform \$1.5M of scope creep. Fortunately, it was done in a safe environment – and it did not result in a cost overrun. The remainder of the course was focused on identifying, practicing, and internalizing the appropriate way to deal with these client situations.

Scope management was not left to chance. Neither should any other layer of the Skill Continuum be left to chance.

The Professional Services Skills Continuum highlighted above identifies the core skills required to develop a well-rounded professional services practitioner:

Skill / Capability Area	Core Skills
Project Management	<ul style="list-style-type: none"> • How to effectively manage through difficult projects – and there are typically no easy projects!
Issue Management	<ul style="list-style-type: none"> • Navigating issues – and turning difficult situations into a demonstration of your problem solving capabilities.
Scope Management	<ul style="list-style-type: none"> • Successfully defining, managing, and navigating scope expansion.
Communications	<ul style="list-style-type: none"> • Appropriately communicating both good news and bad news (there are different methods for delivery) – and successfully engaging the client in the overall project process.
Identifying & Capturing Value	<ul style="list-style-type: none"> • Overcoming the fear of the word “sell” and developing a capacity to create a compelling value proposition that addresses a client need.

My early experience at the Big 6 Consulting firm – as well as my work with a number of Consulting and Professional Services organizations – indicates that you need a formal program that includes a combination of lecture, case study, and experiential learning. As in any classroom setting, you need to explain the “theory” of what you want the Practitioner to learn. Typically this is best delivered by experienced Professional Services personnel so that the theory is coupled with real life examples; making the course a rich mix of both theory and experience. In order to ingrain the lessons with the student, I have found that integrating case studies into the lecture can have significant impacts. Done right, case studies force the student into an experiential learning process. That is, they have to think and act like they were out in the field. Since the material may be new, it may be uncomfortable for them – this is good. They are in a safe environment, where experimenting and trying new techniques can help the better incorporate the learnings into their own behaviors. Lastly, do not end the education at the end of the lecture and case study. Create follow on forums (e.g., brown bag lunches, monthly conference calls) where the students can come together and discuss how they are applying the lessons they have learned. These follow on forums have multiple benefits: practitioners get to hear what others are doing – giving them the confidence to try the same methods; in a safe environment you can discuss how you might potentially address a situation and gain the feedback of others; and you force the practitioners to continue to think about the lessons learned so that it is not “just another course” that was attended then disregarded.

CLOSING

We have all heard the phrase, “It is much cheaper to keep a customer than it is to find a new customer.” Yet, most organizations invest more money in chasing new customers than in doing the things required to create a positive customer experience. By proactively addressing the Professional Services Skills Continuum, Professional Services organizations can prepare their front-line personnel to better manage client relationships, deal with difficult client situations, and proactively identify new “win-win” business opportunities.

ABOUT RTM CONSULTING AND THE AUTHOR

Cincinnati-based RTM Consulting provides strategic and operational advice to assist technology companies with increasing revenues and margins by leveraging professional and consulting services more effectively. Specializing in Resource Management and Professional Services Business Optimization, RTM Consulting helps IT hardware, software and pure consulting businesses achieve the benefits associated with successful professional and consulting services portfolios. With its unique Just-in-Time ResourcingSM solution and Business Acceleration Services, RTM Consulting helps large, medium and small firms move beyond theory to practical application of industry best practices and achievement of exceptional results in the shortest possible period of time.

Mark E. Sloan is the COO of RTM Consulting. Mark is an industry pioneer with respect to defining and deploying Global Resource Management processes for Consulting and Professional Service Operators. Mark is a frequent speaker at professional services industry events. Prior to his current role as COO and Senior Founding Partner of RTM Consulting, Mark held a number of executive consulting and entrepreneurial roles with Accenture and Convergys.

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