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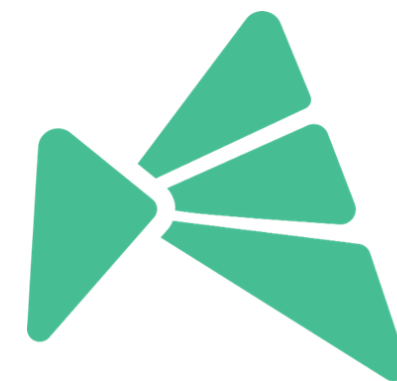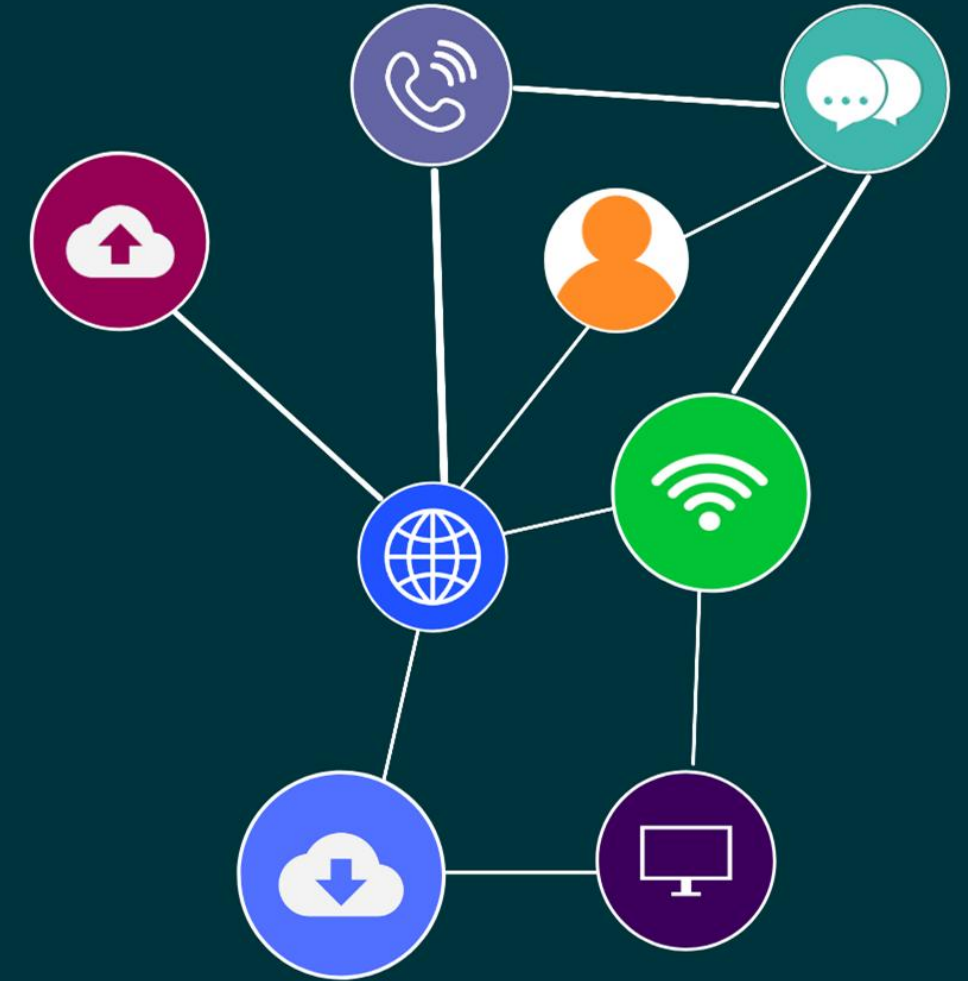
Interact with clients on a business level

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Topic 1: Reviewing a client's business domain

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INTRODUCTION

- This unit is about interacting with clients and developing proposals.

- As an ICT professional, this is something that you will do regularly, and clients are of course of the utmost importance for any business.

- The focus of this unit is to understand clients and their needs to be able to provide services that meet these needs and document this in a proposal.

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PRODUCTS AND SERVICES

- Every business provides products and/or services.

- You need to find out more about exactly which products and services potential clients provide.

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ACTIVITY: RESEARCH AND DISCUSS

Consider a business of your choice.

- What products and services do they provide?

- What does this tell you about the type of ICT solutions they might need?

Make notes on your findings.

The trainer/assessor will facilitate a class discussion about the outcomes from the research.

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ORGANISATIONAL SERVICE STANDARDS

- Organisational standards are benchmarks that an organisation sets for itself regarding its products and services. These provide:

- clear goals and targets

- staff understanding of expectations

- management of customer interactions

- satisfaction increase

- assurance of the level of service.

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ACTIVITY: READ

Look at the service standards in the following link as an example of service standards:

https://www.communityservices.act.gov.au/publications/client_service_standards

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ACTIVITY: RESEARCH AND DISCUSS

Consider an ICT business of your choice and then research their service standards.

- What did you like about these standards?

- What does it tell you about the business?

Make notes on your findings.

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ORGANISATIONAL VALUES

An organisation's values describe the ethics or principles to which the organisation and its employees should follow.

Values can include:

- Efficiency

- Commitment

- Reliability

- Honesty

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ACTIVITY: RESEARCH AND DISCUSS

- What are your personal values?

- When you work for a company, what values do you adhere to?

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ACTIVITY: RESEARCH AND DISCUSS

Look at the following values for Syntax Integration:

https://www.syntax.co.uk/our-approach/

Identify another company that you are interested in and note down their values.

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ORGANISATIONAL CULTURE

- This is how a company's employees define the way they carry out the organisations' shared values and beliefs.

- Organisational culture is important to the performance and reputation of an organisation and will affect the way in which it carries out its business.

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ACTIVITY: WATCH

Apple Culture

https://www.youtube.com/watch?v=cvb49-Csq1o&t= (02:03)

Google interns' first week

https://www.youtube.com/watch?v=9No-FiEInLA (05:50)

• What does this tell you about the values and culture of these organisations?

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ACTIVITY: GROUP WORK

Divide into small groups. Ensure you divide the work equally.

Select an organisation of your choice.

- How can you determine the organisational culture?

- What is the organisational culture for the company you chose?

- How does an organisation create an organisational culture?

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POTENTIAL SOURCES OF INFORMATION

To find out about a clients' organisational service standards, values and culture you will of course need to research them. Your sources of information can include:

- organisational documents

- analytics

- internal correspondence

- reports

- records

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QUANTITATIVE DATA

Quantitative data can be specifically measured.

- Sources include reports, data capture forms, numeric results from surveys and statistical research.

- Quantitative data can be analysed using mathematical equations and computation.

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QUALITITATIVE DATA

Qualitative data is from opinions, observations, written records, thoughts and ideas.

- Qualitative data often comes from surveys or questionnaires where open-ended questions are used to gain information which are not limited by a set of choices or a scale.

- When analysing qualitative data, you need to be aware of bias.

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ACTIVITY: PRACTICAL

Complete the following research task and then address the questions that follow.

Conduct a ping test using a tool from the Internet. Note down your results.

- Which tool did you use?

- What is the source link?

- Why did you choose that particular website to conduct the ping test?

- Can you trust the source that you used, explain why/why not?

- How can you verify the source, or the test carried out?

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REVIEWING DOCUMENTATION

- An organisation may hold many documents that provide information that you need to review to identify key information.

- These documents will provide a large range of information for analysing business requirements.

- Reviewing organisational documents is a common data gathering technique for analysing business needs.

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SERVICE LEVEL AGREEMENTS (SLA)

- A **Service Level Agreement** is an important document that is used to define the level of a service that exists between a service provider and their customer.

- Part of reviewing the client's business domain will also include reviewing any existing Service Level Agreements.

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ACTIVITY: REPORT

Download the Service Level Agreements provided and review their contents.

For each of the Agreements, provide an outline of the services offered and include any additional services that you would consider to be beneficial to the client.

Your report should be between 1–2 pages long and be written in clear and concise English.

Submit your report to your assessor trainer/assessor for feedback.

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Topic 2: Developing new business with client

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INTRODUCTION

- Once you have researched a client and their needs, you will need to move into the next phase which is researching and documenting new business opportunities to meet the client's needs.

- You should try to align the products and services your company offers with the client's needs.

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INDUSTRY STANDARD HARDWARE AND SOFTWARE PRODUCTS

- Having a good understanding of the features and capabilities of industry standard hardware and software products will help you to help your clients.

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ACTIVITY: REASEARCH AND DISCUSS

Using your own knowledge and by undertaking research, complete the table provided in your student guide.

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METHODS USED FOR RESEARCHING A CLIENT'S NEEDS

To research new business opportunities for clients, you can use a range of methods. Methods would relate to the project being undertaken. This could involve:

- reviewing client's website

- researching the company's products and services

- reviewing the client's current service level agreements with different customers

- customer feedback

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TECHNIQUES FOR INFORMATION GATHERING

Information gathering is a very key part of the feasibility analysis process and requires proper methodologies and tools in order to be effective. Your Methods, tools and techniques can include:

- Documents gathered from the organisation

- Interviews

- Questionnaires

- Observation

- Brainstorming

- Workshopping

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ACTIVITY: GROUP WORK

Divide into small groups. Ensure you divide the work equally.

Undertake the tasks provided.

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INTERVIEWS

- Interviewing is flexible and a better tool than a questionnaire for the evaluation of the validity of the information that is being gathered.

- The questions must be phrased clearly, avoiding misunderstandings and carefully evaluating the responses.

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ACTIVITY: GROUP WORK

Divide into pairs.

Conduct an interview in your group. The aim is for each person to take turns in interviewing the other.

Undertake the tasks provided.

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CHANGE MANAGEMENT

Organisational change can be in relation to:

- staff

- processes

- procedures

- policies

- upskilling

- redundancies.

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PROJECT PROPOSALS

- Once the client's needs, business requirements and preferred level of service have been established, it will be time to draft a project proposal.

- A project proposal is a detailed description of a series of activities aimed at solving a certain problem.

- In order to be successful, the project proposal should provide a logical presentation of a research idea.

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CONTRACTS

These can be written separately to a project proposal or form part of one.

Companies may also have specific procedures for develop contracts such as:

- agree on the product or service for the contract

- draw up the contract using the relevant template

- have the contract signed by all parties

- implement the contract.

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CONSUMER LAW

The Australian Consumer Law lists unfair contract terms under consumer law, these are:

- terms that enable only one party to avoid or limit their obligations under the contract

- terms that enable only one party to terminate the contract

- terms that penalise only one party for breaching or terminating the contract

- terms that enable only one party to vary the terms of the contract.

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INDEMNIFICATION CLAUSE

- An indemnification clause is an important legal provision in which the service provider agrees to indemnify the customer company for any breaches of its warranties.

- Indemnification means that the provider will have to pay the customer for any third-party litigation costs resulting from its breach of the warranties.

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Topic 3: Negotiating new business initiatives

PRESENTING PROPOSALS TO THE CLIENT

Before presenting to a client, research should be undertaken to find out the following:

- Who is the audience you are presenting?

- Where is the presentation taking place?

- How long should the presentation take?

- What equipment is available

- Will there be refreshments?

- What is the seating arrangement?

Topic 3: Negotiating new business initiatives

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PRESENTING PROPOSALS TO THE CLIENT

- When presenting a proposal to a client all the information should be clearly structured and communicated so that the client can understand what is being offered.

- Normally, a draft proposal is developed, approved by the project manager and then sent to the client.

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ACTIVITY: READ

The 7C's of Effective Communication:

https://www.toolshero.com/communication-skills/7cs-of-effective-communication/

How to practice active listening: 16 examples & techniques:

https://positivepsychology.com/active-listening-techniques/

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NEGOTIATIONS WITH CLIENTS

- A key concept of negotiation is that there is a common interest that is to be negotiated.

- This common interest will mean there is the opportunity to build a business relationship since both parties are interested in engaging with each other.

- A win-win outcome means that there is an agreement that is acceptable to both parties.

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ACTIVITY: READ

Negotiation Skills

https://www.youtube.com/watch?v=bgz2vNMTpxQ (05:07)

The trainer/assessor will facilitate a class discussion about the outcomes from the video.

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ACTIVITY: GROUP WORK

Refer back to your previous activity. Assume that you are to deliver a presentation to the client on the services that can be offered.

Undertake the tasks provided.

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ACTIVITY: GROUP WORK

Assume that the client has given you the feedback and one of the issues they have is cost.

Undertake the tasks provided.

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ACTIVITY: GROUP WORK

When you receive the feedback from the client (your assessor), amend your draft proposal to show the changes.

Undertake the tasks provided.

Topic 3: Negotiating new business initiatives

Topic 4: Monitoring, adjusting and implementing procedures to maintain client focus

INTRODUCTION

Once the proposal is underway it is very important to monitor its progress.

Progress should be measured according to specific metrics such as:

- Time

- Costs

- Quality

Topic 4: Monitoring, adjusting and implementing procedures to maintain client focus

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FEEDBACK

It is important to obtain and respond to any feedback during the process of providing services to clients. This can be during or after the service.

Feedback can come from a number of methods, platforms and mediums such as:

- a customer survey or questionnaire

- a rating on an app

- telephone calls

- social media reviews.

Topic 4: Monitoring, adjusting and implementing procedures to maintain client focus

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ACTIVITY: READ AND WATCH

Read the following article and watch the embedded video:

What is customer feedback and why it is important?

https://www.wonderflow.co/blog/what-is-customer-feedback-and-why-it-is-so-important-to-your-business

The trainer/assessor will facilitate a class discussion about the outcomes from the video.

Topic 4: Monitoring, adjusting and implementing procedures to maintain client focus

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IMPROVEMENTS

- You can use the feedback received to improve on the service delivered or to acknowledge successes.

- One way to determine improvements is to look at any performance outcomes either stated in the service delivery contract or through customer service standards.

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SURVEYS

- A popular method for collecting and analysing feedback is through survey.

- Surveys need to be well designed and use effective questioning techniques to find out the information that you are seeking.

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ACTIVITY: READ AND WATCH

Go to www.surveymonkey.com and check out how the surveys can be developed.

Read about survey design:

Survey Design 101

Read the following article on creating surveys:

https://blog.hubspot.com/service/create-a-survey

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CLIENT FEEDBACK

- Asking for feedback from a client can be informal questioning from a telephone conversation or a formal survey or questionnaire.

- Questions must be relevant and appropriate to the service that has been provided and using the most effective format and medium.

- It can address the level of satisfaction of the service level agreement, if any contract modifications are required, whether it met with expectations, what they would like to improve, what worked well and what didn't.

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ACTIVITY: READ AND WATCH

Why customer feedback is important to your business:

https://blog.startquestion.com/7-reasons-why-customer-feedback-is-important-to-your-business-28e99c00eba7

Effective ways to get customer feedback:

https://www.timecamp.com/blog/2018/02/8-effective-ways-to-get-customer-feedback/

Take any notes to summarise what you have read and keep for future reference.

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ACTIVITY: PROJECT

Using a method and medium or platform of your choice, develop a survey or feedback mechanism that can be used to collect client feedback to improve a proposal.

The trainer/assessor will facilitate a class discussion about the outcomes from the project.

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