# Shadowing consulting calls SOP

## Selecting calls

Approach: it is optimal to sit in on client calls where the partners may be experiencing some trouble, or the account is not going as smoothly as others. It is also ideal to spread the love around. It should be about 2 calls per consultant per month that get shadowed. There are obviously time constraints on when calls will line up on the calendar, but that’s just life.

Adding them to the managers calendar

What I typically do is present my calendar next to the automation team calendar and simply look for any slots that line up during the weeks. I then add the available shadow options that work with my calendar. Then I pare them down, ideally filtering them to 2/consultant. **(Can be handed off to Nilesh/Service Ops)** This should be different clients each month.

## What does a successful call look like

**Timing/length:** I believe successful calls should last the hour, or MOST of the time (50+ minutes). If the call points are discussed and there is still time remaining, this is where the consultant should be pushing the MSP for more work. Pressing them to give us more action items. It doesn’t always work, but we want to make it abundantly clear that we’re looking for more work from them. That is always how our partners should feel. Extra time can also be used to build the relationship with the partner. Get to know them better, find common interests, etc.  
Note: Overages are fine on the consulting call, but we do want to ensure we’re being cognizant of the partner’s time.

**Controlling the call:** In calls, it is important to control the flow of the conversation to the best of your ability without being rude or cutting the partner off. We may have things to go over with them that matter so we do want to ensure we leave enough time to get through our content. We should strive to get through all of our ProVal content that we have available for the call.

**Content delivery**: This one is going to vary quite a bit depending on the scenario available, but we will review how the content is “sold” to the partner. The things that we go over matter. Just telling someone some numbers and saying thanks is not going to provide additional value. We want our consultants to dig in on points and help deliver action items to ourselves or the partners.

**Notes**: Ensure that the consultant is taking accurate notes about what was discussed in the call. Any changes made live on the call should be documented in that month’s notes. Is the consultant creating action items that we can turn into proper tickets that the team will understand. We have to have good enough notes to ensure the team will be successful and that the consultant will not forget the request.

**Template adherence**: The template needs to be FULLY filled out (where data is applicable.) Regardless if the client shows up or not, we should be filling out this sheet to its entirety every time. This data is used to look for “wins” to share with the sales/marketing team.

**Fun**: This shouldn’t always be all business! We want to see our team connecting with our partners as much as possible. These personal relationships will keep the partner coming back month over month. People like to work with people they like.

**Appearance**: Ensure that the consultant has their camera turned on, is wearing proper attire, uses proper/professional language. Or at least language that the partner is comfortable with. ‘Mirroring’ partners is important, but remember we are still ProVal representatives. We should keep things mostly professional. Stable internet/minimal interruptions during the call. (Note if consultant’s camera is off, the maximum value is a 2.)

Grading:

A simple 1-5 rating system of the call would be great for each category. Then we can take an average number of stars and come up with a metric around consulting call compliance. There are currently 7 categories. Maximum score can be 35.

A = 26-30  
B = 22-26  
C = 16-22  
F = < 16

Feedback & Notes:

We are still working on a place to track the feedback in the ticket. For now it is going into a tracking sheet stored in the Manager’s sharepoint.

Examples of notes:

Timing/Length – 3/5 - The call ran for 40 minutes. Consultant only asked once for additional work. Didn’t dig for more action items.

OR

Timing/Length – 5/5 - The call ran for 40 minutes. Consultant dug in to ask for action items, but the partner didn’t come up with anything. Consultant decided to ask about personal weekend plans to see what the partner is into. Great relationship building.

This feedback should be provided after each call per section. There should be an overall score based on star counts. There should also be a “summary” style review of the call.

Example:

Summary: 27/35 – Great call all in all, want to dig in a bit further on some items. Some of the notes were a bit confusing but at least mostly understandable. Template was missing 1 item.