

Kyndryl Academy
Consult, Level 1

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Activity Workbook

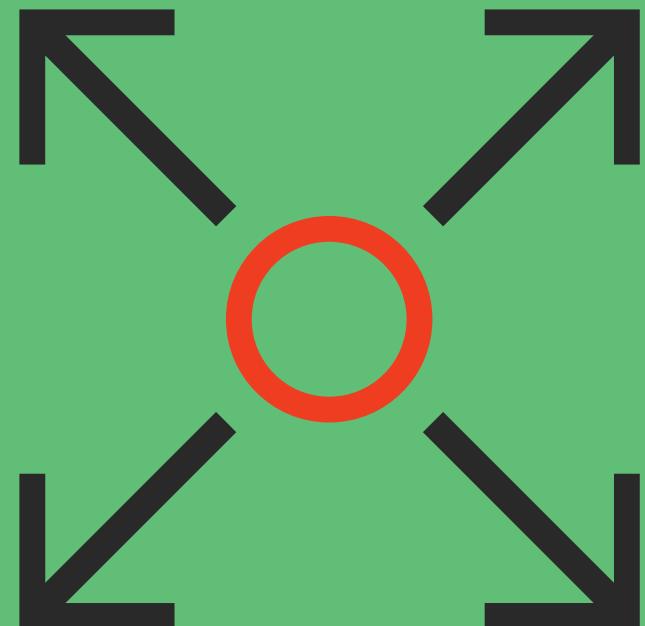


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01

The Art of Consulting

Key Habit:

Think strategically and proactively seek value for customers

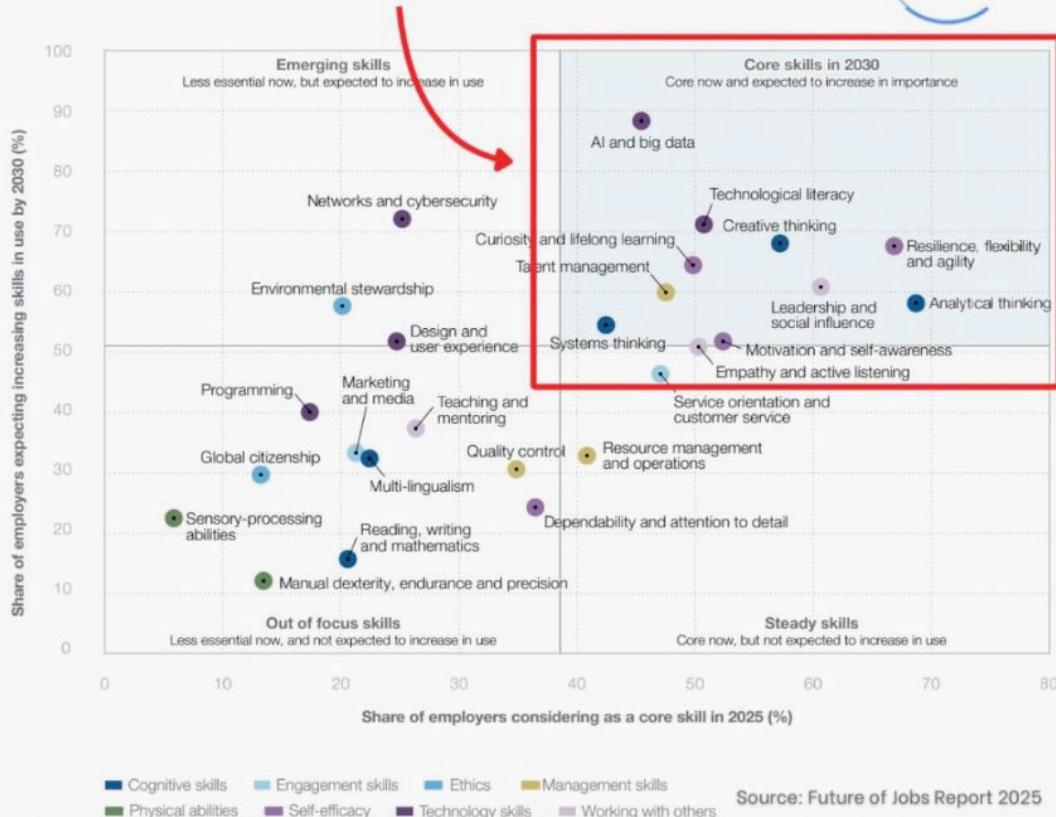
Consultant Mindset: Core Behaviors

Mindset Trait	Description
Customer-Obsessed	Puts the customer's needs, goals, and experience at the center of every decision
Curious and Inquisitive	Constantly asks "Why?", seeks root causes, and explores beyond the obvious
Outcome-Oriented	Focuses on delivering measurable value, not just completing tasks
Strategic and Business-Savvy	Understands the customer's industry, competition, and business drivers
Challenger Mentality	Questions assumptions, reframes problems, and pushes for transformation
Collaborative Influencer	Builds trust-based relationships and mobilizes people across silos
Agile and Adaptive	Navigates ambiguity with flexibility and resilience
Tech-Enabled	Leverages AI and digital tools to enhance insight, speed, and value

Consultant Mindset: Core Skills

Core Skills in 2030

WORLD
ECONOMIC
FORUM



Applying the Kyndryl Way in Consulting

The Heart of Progress



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The Kyndryl Way

Purpose
Together, each of us advances the vital systems that power human progress.

Mission
To be a technology services company that is a partner, and an employer of choice.

Engaging with one another, with our customers and our communities, we are:

Restless  to continuously anticipate, learn and innovate	Empathetic  to serve with trust and transparency	Devoted  to shared success
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How we organize ourselves, our work and our decisions to support our customers:

Flat  to empower accountable, inclusive teams	Fast  to cultivate simplicity everywhere	Focused  to deliver exceptional services
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Kyndryl Leadership Behaviors

Individual Contributor



⇒ Fast, Agile Change Leader

- Speak up, question status quo, explore new possibilities, and take calculated risks
- Identify obstacles and resolve them proactively to focus on delivering solutions
- Align individual goals with strategic vision and collaborate on the execution plan
- Seek clarity, share outcomes openly - both setbacks and success, to accelerate learning and win more
- Be open and embrace change with practiced persistence and resilience
- Experiment, iterate, and share learnings

Kyndryl Leadership Behaviors

Individual Contributor



Empathetic Role Model with Employees & Customers

- Act with trust, transparency, and integrity
- Communicate honestly, with empathy and respect, and share your as-lived experience candidly upwards
- Listen and engage broadly; encourage others to stay open and learn from diverse perspectives
- Ensure your work is aligned to our mission, values, and goals, question when it isn't, and focus on continuous improvement
- Create a safe, transparent, positive, and inclusive environment for all; support and embody inclusion and equity
- Act in the best interests of Kyndryl, even when it conflicts with self-interest
- Share information openly across teams and upwards
- Be self-aware, admitting mistakes, and look to grow as a leader

Kyndryl Leadership Behaviors

Individual Contributor



Devoted to Shared Success & Focused on Service

- Continuously learn and apply skills to achieve team business goals
- Build a deep analytic understanding of the people, technology, and customer challenges
- Act with urgency, seeking clarity and prioritizing actions with aggressive but realistic time frames
- Execute locally and collaborate to share and leverage best practices across teams
- Recognize and communicate mistakes, overcome setbacks, avoid blame, fix locally, and apply learnings globally

Kyndryl Leadership Behaviors

Individual Contributor



Restless To Power The Future

- Be eager to learn from the external, competitive landscape and share insights to act boldly on opportunities
- Seek to gain experience with customers to learn, improve, and innovate in response to evolving market, customer, and organizational needs
- Co-create with stakeholders, both internally and externally, to drive opportunity
- Be a brand ambassador for Kyndryl
- Continually deliver both incremental improvement and real innovation

Kyndryl Leadership Behaviors

Individual Contributor



Flat: Build Empowered, Inclusive, Accountable Teams

- Help interview and refer great talent
- Understand your role within the organization and collaborate with cross-functional teams; ensure focus on outcomes and accountability
- Build skills to develop your career and support team development
- Challenge non-inclusive behaviors, creating an inclusive environment; help build an inclusive Kyndryl by becoming an ally (e.g., participating in Kyndryl Inclusion Networks)
- On a team, be a good player; when leading, be a good and inspiring coach

Personal Reflection

Identify Personal Growth Areas Aligned to Consulting Skills

Key Question: Think about the key consulting skills just discussed.

What skills do you need to develop, and how can you show up everyday exhibiting the Kyndryl Way?

Identify personal growth areas related to key consulting skills. List ideas for how to develop each skill.

Notes Here

Thinking about the Kyndryl Way, how can you improve how you show up everyday with your team and your customers?

Notes Here

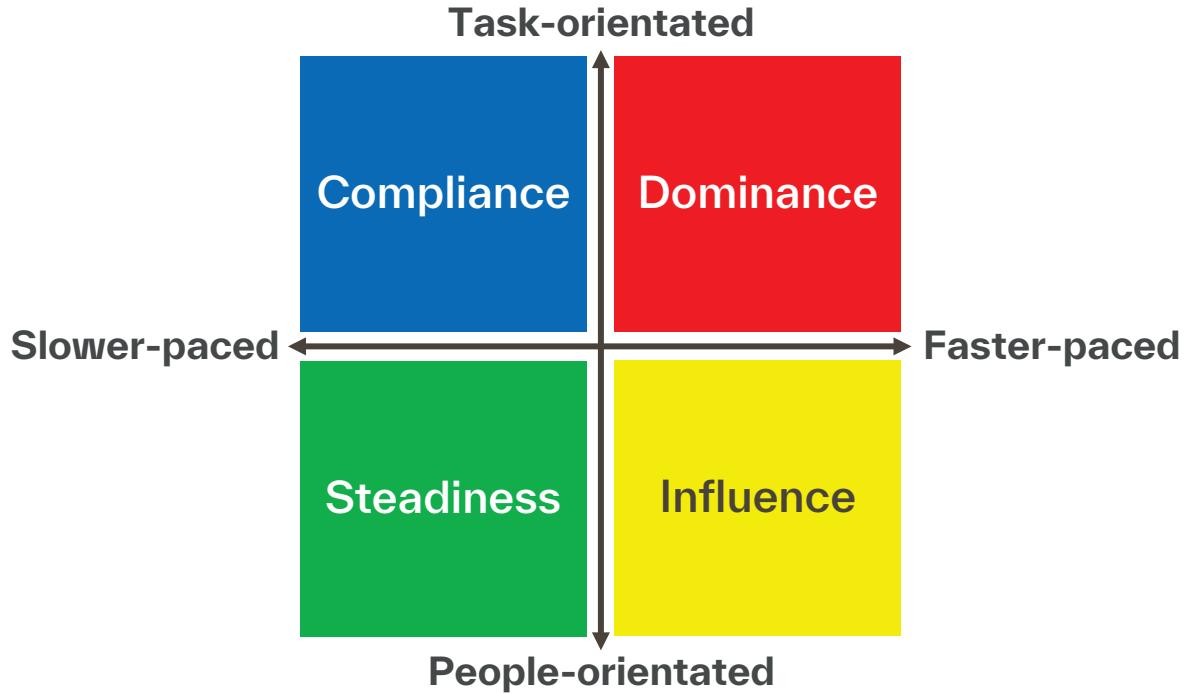
02

DISC[®]: Knowing Yourself and Others

Key Habit:

Adapt communication styles to strengthen collaboration and influence

The Four DISC® Dimensions



DISC® Representations



Additional Characteristics

Dominance



- Interrupts
- Tries to take over
- Very direct
- Short attention span
- Restless and impatient
- Uses “concrete” and “action-oriented” language

Influencing



- Enthusiastic
- Friendly and expressive
- Spontaneous
- Tells stories
- Well dressed although often scruffy at the end of the day
- Uses “visual” language

Steadiness



- Good listener
- Lets others take the lead
- Is kind and reluctant to draw attention to self
- Non-aggressive
- Uses “feeling” language

Compliance



- Writes notes
- Is precise and factual
- Is cautious to express emotion
- Asks lots of questions
- Uses “logical” language

03

Project Materials

Review

Key Habit:

Seek knowledge about a new customer or industry

Introduction to Co-Creation

A co-creation session with a customer is a structured, collaborative workshop where you partner together to design, solve, or innovate around a shared challenge. Instead of presenting a finished solution, you invite the customer into the creative process — treating them not just as a stakeholder, but as a strategic thought partner.

What Happens in a Co-creation Session:

- **Joint Problem Framing:** You explore the challenge together, surfacing pain points, goals, and constraints from both sides.
- **Idea Generation:** Through brainstorming, design thinking, or facilitated dialogue, you generate potential solutions collaboratively.
- **Rapid Prototyping:** You sketch, storyboard, or mock up concepts in real time — often using tools like Miro, whiteboards, or even roleplay.
- **Feedback Loops:** Customers react to ideas, refine them, and help prioritize based on feasibility, impact, and alignment.

Why It's Powerful:

- **Builds Trust:** Customers feel heard and valued, which strengthens the relationship.
- **Accelerates Alignment:** You reduce back-and-forth by aligning early on goals, tone, and direction.
- **Uncovers Hidden Needs:** Customers often reveal deeper insights when they're part of the design process.
- **Drives Ownership:** Co-created solutions are more likely to be adopted because the customer helped shape them.

Notes from Materials

Capture notes from your review of the HealthCareOne materials.

Notes Here

04

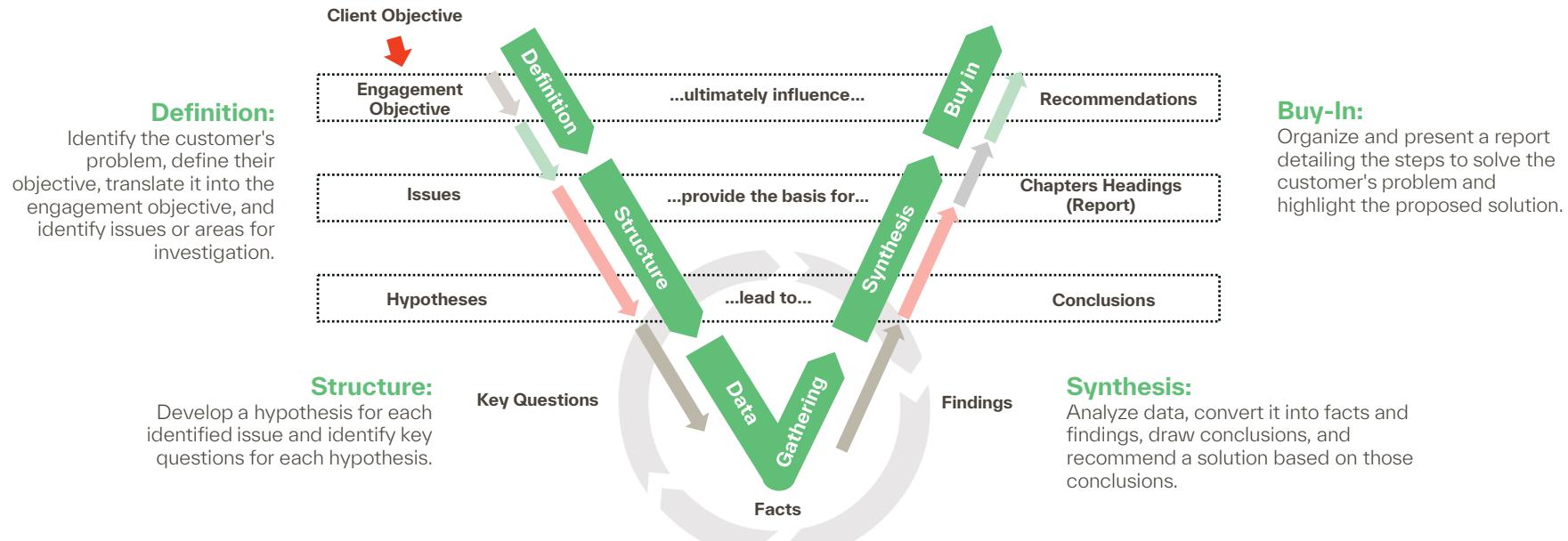
Exploring the Customer Opportunity

Key Habit:

Structure data collection around hypothesis-driven inquiry to ensure focused problem-solving

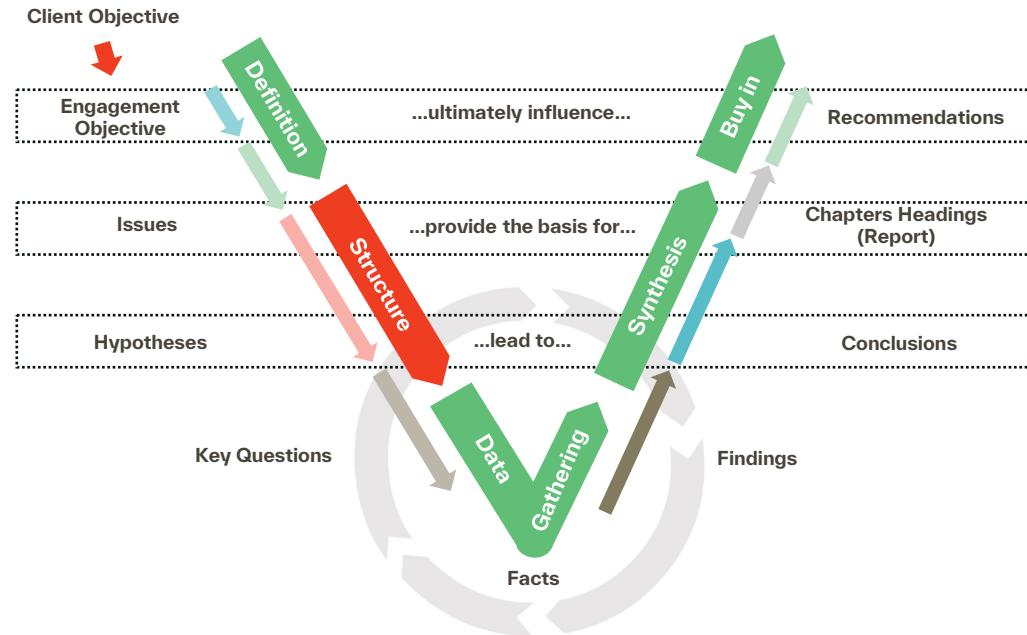
Issue-Based Consulting (IBC)

(IBC) is a rigorous technique that helps solve complex problems efficiently and effectively by making logical recommendations. It is structured around five stages, which are:

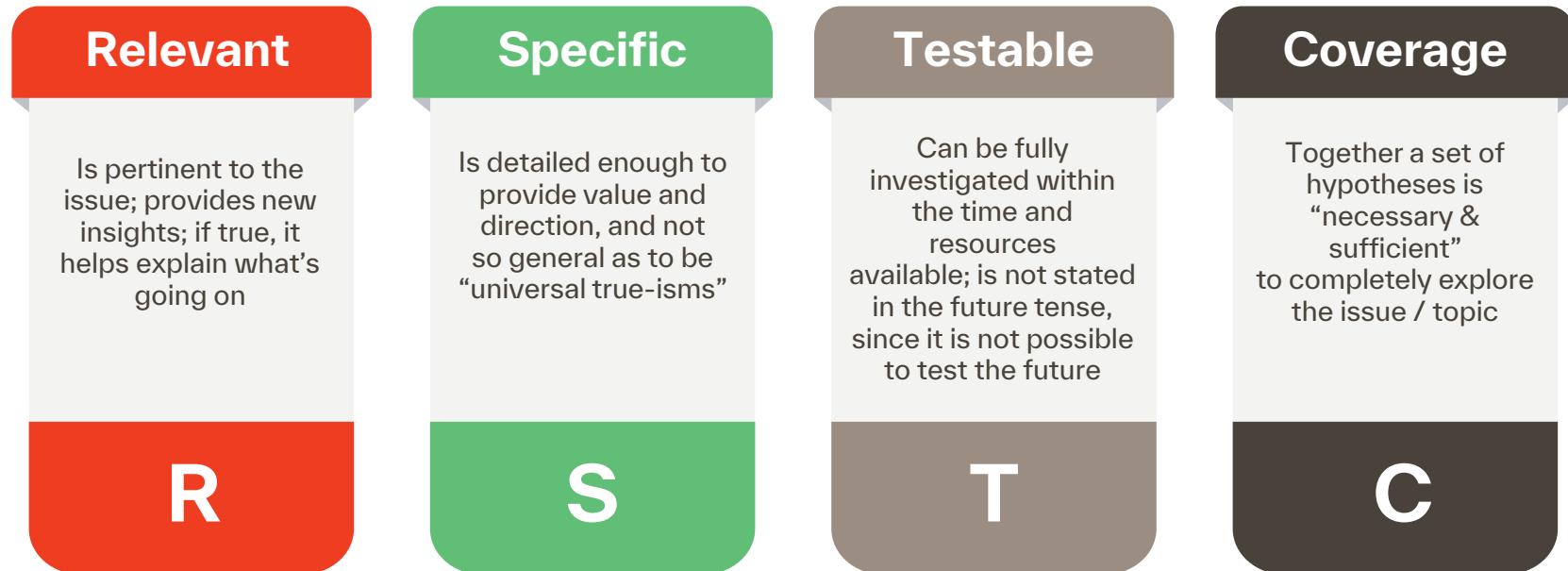


Hypothesis Overview

- A hypothesis is a “best guess” at the root cause of the customer’s situation
- It is a clear statement which can be supported or challenged by data
- We develop hypotheses based on best practices, knowledge of the customer, and/or personal experience
- Proving something wrong may be easier than proving something right
- Hypotheses trigger “key questions” that drive the data gathering stage
- Always start your hypothesis from your issues!



When reviewing our hypotheses, we should apply the “relevant, specific, testable, coverage (RSTC)” test.



Project Activity

Crafting Hypotheses and Cause-And-Effect Questions

Key Question: What are 3-5 hypotheses for the project ask and what are their cause-and-effect questions?

What are 3-5 hypotheses you will further explore?

Notes Here

What are their cause-and-effect questions?

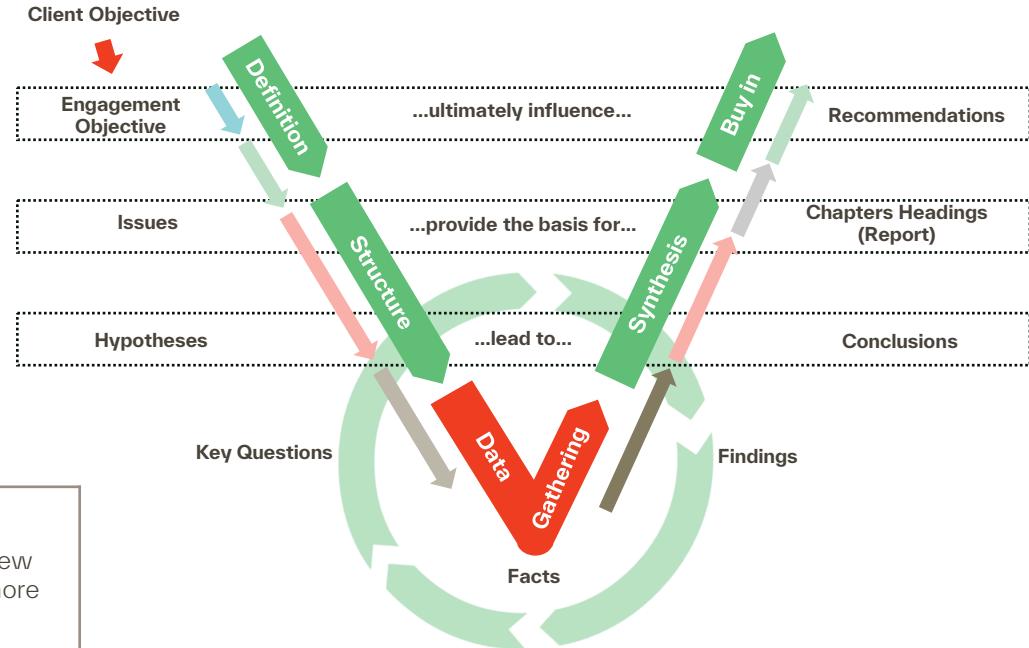
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Data Gathering Phase

Data Gathering:

- Gather data relevant to the key questions identified in the previous stage
- Check the accuracy and relevance of the data collected
- Summarize the data to address the key questions
- Aim to prove or disprove the hypotheses formulated earlier
- Adjust the hypothesis as needed based on the data findings
- Create new hypotheses if necessary

<ul style="list-style-type: none">• Define Needs• Plan• Gather• Summarize	During this stage, we may also adjust our hypotheses, or form new ones, as we gain a clearer and more detailed understanding of the customer's situation.
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Data Gathering Methods

Method	When To Use	Tips
Document Review	For context, baseline, and history	Ask for internal decks, reports
Stakeholder Interviews	For perspectives, assumptions, pain points	Prepare questions in advance; listen actively
Surveys/Questionnaires	To gather broader input quickly	Keep short; test for clarity
Observations/Shadowing	To understand processes, behaviors	Take detailed notes; look for patterns
Data Pulls	For structured metrics and trends	Collaborate with customer analysts

Data Type	Examples	Sources
Qualitative Data	Stakeholder input, customer feedback, team observations	Interviews, workshops, email threads, meeting notes
Quantitative Data	KPIs, revenue, customer churn, operational data	Customer systems, public datasets, dashboards, reports

Data Source Matrix Example

Source	Data Type	Data Gathered	How It Addresses the Hypothesis
Smartphone Screen-Time App Logs	Quantitative	Minutes of screen exposure in the 2 hrs. before bedtime	Objectively measures blue-light exposure just before sleep, so you can compare nights with/without the glasses
Tablet Usage Logs	Quantitative	Minutes of tablet exposure in the 2 hrs. before bedtime	Captures additional screen exposure (e.g., reading on a tablet) to ensure total blue-light dosage is tracked

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Additional Details for Data Gathering Methods

Interviews

Interviews refer to discussions with one or two individuals at a planned time, in a structured format with prepared questions. Interviews are often one of the biggest sources of information.

- *Advantages of this technique:* It builds relationships, and it enables the interviewer to probe into topic areas depending on the responses given.
- *Disadvantages of this technique:* It is time-consuming and requires many consulting resources. You must also plan, allotting enough time in the schedule to allow time for effective write-ups of each interview.

Documentation reviews

Some sources of information include organizational charts, job descriptions, company reports, accounts, architecture diagrams, and process or procedure documents.

- *Advantages of this technique:* This type of documentation is often seen as a definitive source of information; so, it tends to provide a framework of reference for data gathered through other techniques.
- *Disadvantages of this technique:* The documents may not be maintained. Even if they are maintained and current, the documents may not represent reality.

Workshops

Workshops are an efficient way to gather information because they typically involve multiple stakeholders with relevant inputs. They also provide natural means of corroboration to collect data from multiple stakeholders.

- *Advantages of this technique:* It allows participants to share diverse viewpoints; is more efficient compared to holding multiple interviews; promotes buy-ins and commitment decisions; enables joint problem-solving and higher quality outcomes; and helps the group stay focused on the objectives if the workshop is a well-prepared, structured session.
- *Disadvantages of this technique:* It is a challenge to get all the required participants together at the same time, especially if the workshop is for three or more hours. Also, some participants may not feel comfortable to share their inputs freely during the workshop.

Additional Details for Data Gathering Methods

Direct observation

An experienced consultant must be objective when gathering “facts” about his or her customer. This form of data gathering includes auditing existing customer meetings and observing first-hand their ways of working.

- *Advantages of this technique:* It provides direct inputs about what people do versus what they say they do.
- *Disadvantages of this technique:* It may require a lot of time and effort to obtain a small, though important, piece of information. You must plan and allot enough time in the schedule to allow for effective writing-up of what was observed in the meeting.

Focus groups

This refers to discussions with a group of people, such as customers of your customer team or subject matter experts (SMEs), who have valuable inputs on the engagement. A single-focus group includes different types of participants, but they are grouped together because they can provide information on a specific set of topics. Focus groups tend to average between six to twelve participants; it often includes participants beyond the pool of stakeholders immediately associated with your engagement objectives.

- *Advantages of this technique:* It provides direct inputs from the selected demographic group(s), solicits multiple points of view, encourages creativity, what if exploration, and a well-prepared structured session which helps the group stay focused on the objective.
- *Disadvantages of this technique:* Adequate time must be invested to identify appropriate participants, especially those who are trying to balance various and conflicting points of view.

Questionnaires and surveys

These instruments are typically used to collect quantitative data from larger samples. Answers are usually multiple-choice or follows a rating scale methodology. Open questions are not used when collecting data from larger samples.

- *Advantages of this technique:* It is best for larger sample sizes. It reaches participants who are anywhere, in scattered locations and it is effective when questions are detailed and specific.
- *Disadvantages of this technique:* A lot of care is required to define the purpose, instructions, and questions of the survey in a clear, concise, and unambiguous manner. This is necessary to ensure that participants are clear about what is required of them to complete the questionnaire or survey since they will be unable to ask clarifications about any aspect of the questionnaire.

Data Gathering Resources

Forms	Examples	Where To Find
Market data	<ul style="list-style-type: none">• Market intelligence• Industry data• Public data	<ul style="list-style-type: none">• Northern Lights• Google• Industry guilds• Market and account intelligence tools• Workstuff.ai (coming soon)
Sales assets	<ul style="list-style-type: none">• Sales materials• Pricing / sizing guidelines• Marketing collateral• Customer stories	<ul style="list-style-type: none">• WinCoach• Customer Journey Tool• Kyndryl.com
Overarching assets	<ul style="list-style-type: none">• Methods• Frameworks• Education and/or training materials	<ul style="list-style-type: none">• Method library• Alliance teams• Vendor sites
Global assets	<ul style="list-style-type: none">• Reference architectures• Assessment techniques• Assessment tools/matrices• Methods / Delivery Processes• Models• Example final reports• Project plan examples• Interview guides• Workshop materials	<ul style="list-style-type: none">• Kyndryl Consult SharePoint• Knowledge Library• Practice SharePoint• Profession SharePoint• Github libraries (most will be listed on a practice or local SharePoint)
Geo / local developed assets	<ul style="list-style-type: none">• Assets and deliverable from other projects	<ul style="list-style-type: none">• Knowledge Library• Local SharePoint• 'Friends' / Network / Colleagues• GSAR• Guilds• Reference Library

Personal Reflection

Hypothesis Generation and Data Gathering

Key Question: How does a structured approach to data gathering and hypothesis-driven inquiry enhance the clarity and impact of consulting recommendations?

What is one key learning about data gathering that you'll apply in your next consulting project?

Notes Here

How can hypothesis-driven inquiry improve your consulting approach?

Notes Here

05

Day 1

Reflections

Key Habit:

Reflect on key takeaways and commit to immediate application in consulting work

Personal Reflection

Reflect on Day 1

Key Question: How will today's insights shape my approach to consulting and influence the way I work moving forward?

What is your biggest takeaway from today?

Notes Here

What knowledge or skill can you apply immediately on the job? How will you apply it? How do you know you've applied the knowledge or skill successfully?

Notes Here

06

No Lone Wolves: The Power of Strong Teams

Key Habit:

Prioritize clear communication and feedback to enhance teamwork

Personal Reflection

Improving Team Collaboration

Key Question: What are your top three takeaways from the session, and what is one action you can take to improve your collaboration with your current project team?

What are your top three takeaways from this session?

Notes Here

What is one action you can take after this program to improve your collaboration with your current project team?

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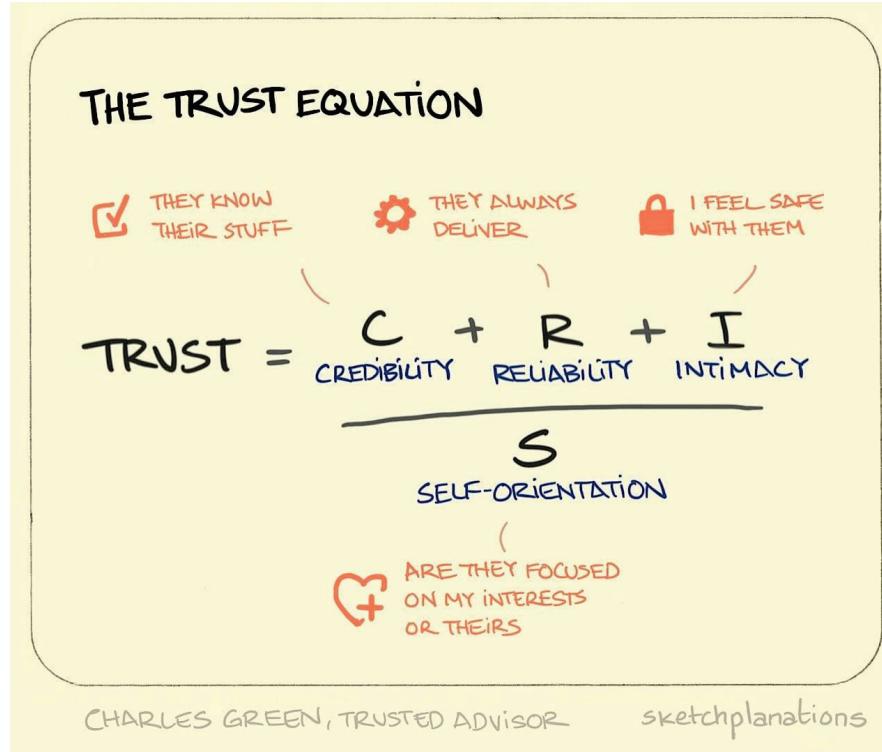
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Building Trust: Your Consulting Currency

Key Habit:

Establish trust by understanding customer and team needs and fully showing up

The Trust Equation



Building Customer Trust

Strong customer relationships are critical in consulting because they form the backbone of trust, influence, and long-term success.

- **Trust Drives Influence:** Customers need to trust you before they'll follow your advice or share sensitive issues
- **Deeper Understanding of Customer Needs:** Good relationships lead to better conversations—and better insight into the real challenges
- **Better Communication and Collaboration:** Open, honest relationships lead to clearer expectations, fewer misunderstandings, and faster decision-making
- **Customer Satisfaction and Loyalty:** Strong relationships turn one-time projects into ongoing partnerships
- **Competitive Advantage:** A strong relationship is often the reason a customer chooses you over a competitor with similar expertise
- **Easier Conflict Resolution:** Even when things go wrong, a solid relationship makes it easier to have tough conversations and find solutions quickly
- **Enables Strategic Impact:** With strong relationships, you're seen not just as a vendor, but as a trusted advisor

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Building Customer Trust (cont.)

Ways to build customer trust include:

Understanding the customer's environment:

- Industry
- Business model
- Competitive landscape
- Regulatory environment
- Recent company headlines
- Strategic goals or challenges

- Communicating value clearly and aligning recommendations with business needs
- Listening actively and demonstrating empathy toward concerns
- Delivering consistent results to reinforce reliability
- Bringing insight, not just information
- Respecting their time and constraints

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Personal Reflection

Building Trust with Others

Key Question: What are your top three takeaways from the session, and what is one trust building strategy you can apply in your next team or customer interaction?

What are your top three takeaways from this session?

Notes Here

What is one trust building strategy you can apply in your next team or customer interaction?

Notes Here

08

Inquiry With Impact

Key Habit:

Ask thoughtful questions to uncover deeper insights and enhance problem-solving

Types of Questions

Closed vs. Open-Ended Questions

Closed-Ended Questions

- Questions that can be answered with a yes, no, or a fact
- Often start with: Do, is, are, can, have, will
- Good for confirming facts
- Example: ***Did the product launch on time?***

Open-Ended Questions

- Questions that require explanation, reflection, or opinion
- Often start with: What, how, why, tell me about
- Good for exploring context, motivation, or ideas
- Example: ***What challenges did you face during the product launch?***

Types of Questions

Other Types of Questions

Clarifying Questions	Exploratory Questions	Challenged-Based Questions	Reflective Questions
<ul style="list-style-type: none">Ensure shared understandingExample: <i>Can you walk me through what customer success means here?</i>	<ul style="list-style-type: none">Surface unknowns or assumptionsExample: <i>What hasn't worked in the past - and why?</i>	<ul style="list-style-type: none">Reframe or test thinkingExample: <i>What if the problem isn't churn but onboarding friction?</i>	<ul style="list-style-type: none">Build relationships, understand valuesExample: <i>What would success look like for you personally?</i>

Personal Reflection

Curiosity and Inquiry

Key Question: In what ways can you apply curiosity and inquiry techniques?

With your teams?

Notes Here

With your customers?

Notes Here

09

Listening With Intent

Key Habit:

Engage fully and actively listen to ensure clarity, understanding, and meaningful conversations

Personal Reflection

Active Listening

Key Question: How can you improve your active listening?

How can you apply active listening techniques with your teams and customers?

Notes Here

What is one area where you can improve your active listening? What steps can you take to improve?

Notes Here

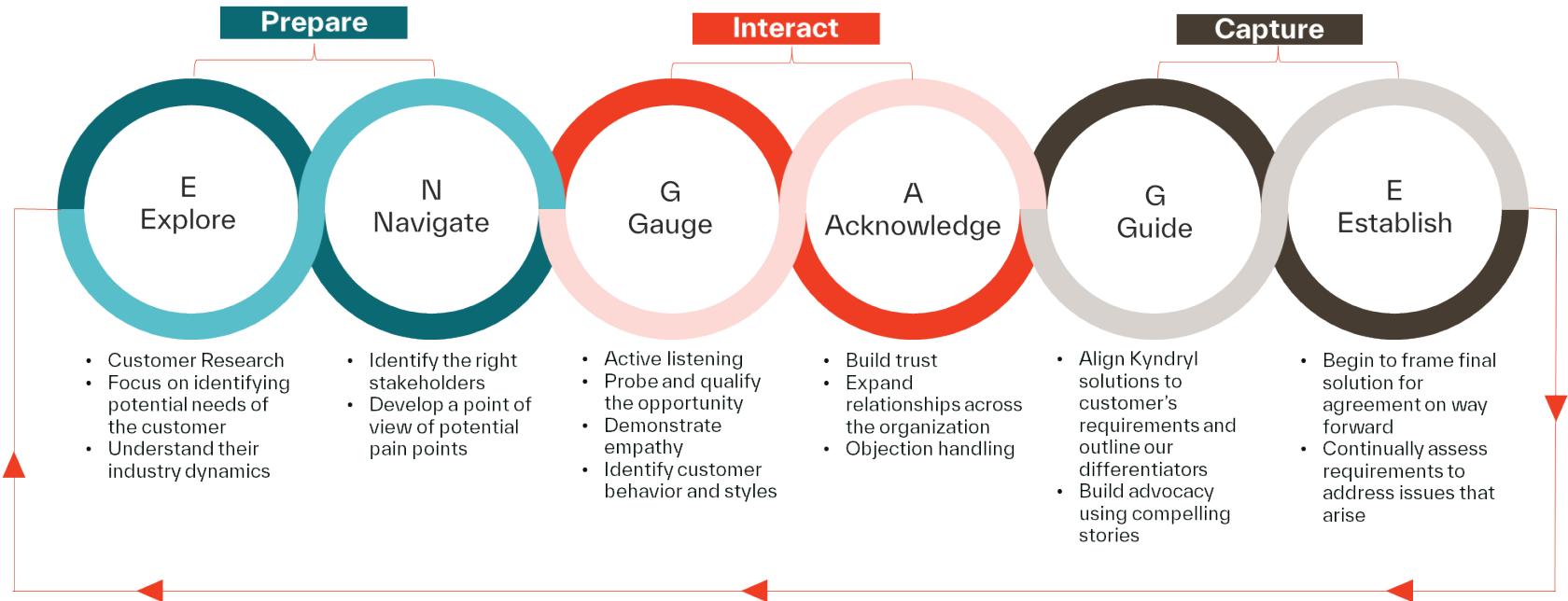
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Consult Partner Conversation

Key Habit:

Use effective questioning and active listening to extract key insights from others

Consultative Selling Capability Framework



Personal Reflection

Consult Partner Conversation

Key Question: How effectively did you engage in the Consult partner conversation to uncover insights and test assumptions?

What strategies helped you establish rapport and allow you to understand the drivers behind the approaches used in the Consult partner's project?

Notes Here

What did you refine in your approach to improve clarity, alignment, or impact in the second conversation?

What other changes would you make for future conversations?

Notes Here

11

Data Gathering Team Time

Key Habit:

Focus on collecting high-impact data that directly supports consulting hypotheses

Data Source Matrix Template

Source	Data Type	Data Gathered	How It Addresses the Hypothesis

Project Activity

Planning the Data Gathering Approach and Starting Research

Key Question: Is our data gathering approach comprehensive, and how will I personally contribute?

- Have we identified all relevant data sources?
- Are we ensuring objectivity and avoiding biases?
- How does this data directly support our hypotheses?

Notes Here

- What piece(s) of the data gathering plan am I responsible for?
- What data sources will I leverage?

Notes Here

Project Activity

Adjusting Data Gathering Approaches Based on Information Learned

Key Question: What have you found during your research that supports or refutes your hypotheses?

- What key information/data have you discovered?
- What was the source?

Notes Here

Project Activity

Adjusting Data Gathering Approaches Based on Information Learned

Key Question: How is your hypotheses and data gathering approach changing as you obtain more information?

- What recent information have you learned that will impact your hypotheses and data gathering approach?
- What adjustments to your approach will you make as a result?

Notes Here

12

Day 2

Reflections

Key Habit:

Reflect on key takeaways and commit to immediate application in consulting work

Personal Reflection

Reflect on Day 2

Key Question: How will today's insights shape my approach to consulting and influence the way I work moving forward?

What is your biggest takeaway from today?

Notes Here

What knowledge or skill can you apply immediately on the job? How will you apply it? How do you know you've applied the knowledge or skill successfully?

Notes Here

13

Customer Conversation

Key Habit:

Use effective questioning and active listening to extract key insights from others

Personal Reflection

Customer Conversation

Key Question: How effectively did you engage in the Customer conversation to uncover insights and test assumptions?

What strategies helped you establish rapport and allow you to understand the customer's needs and priorities?

Notes Here

What would you do differently if you had the opportunity to redo the conversation?

Notes Here

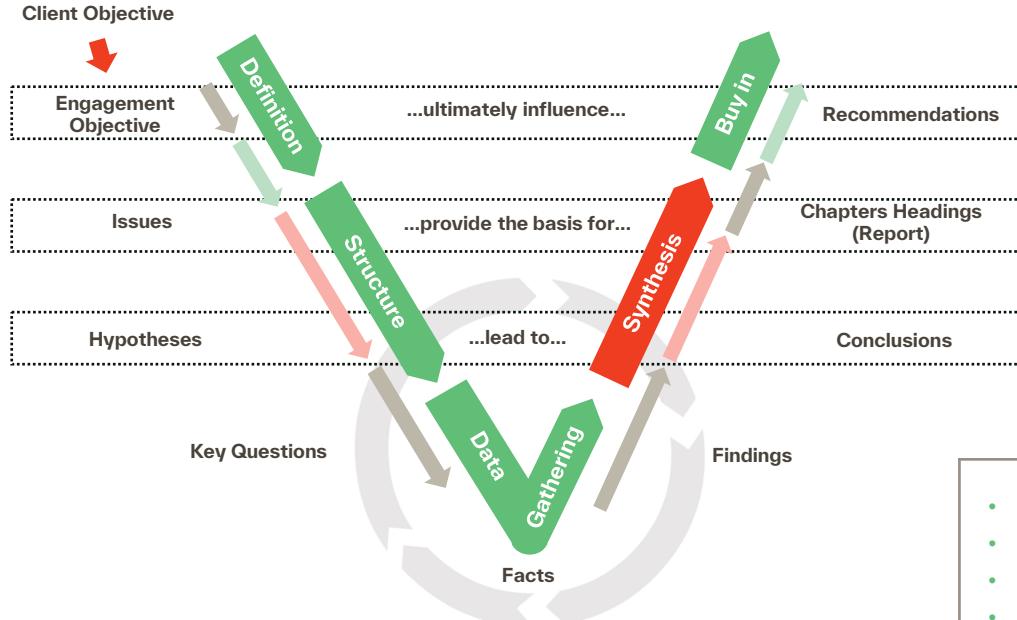
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Finding Meaning That Matters

Key Habit:

Translate raw data into structured insights that guide actionable solutions

The Synthesis Phase



Synthesis:

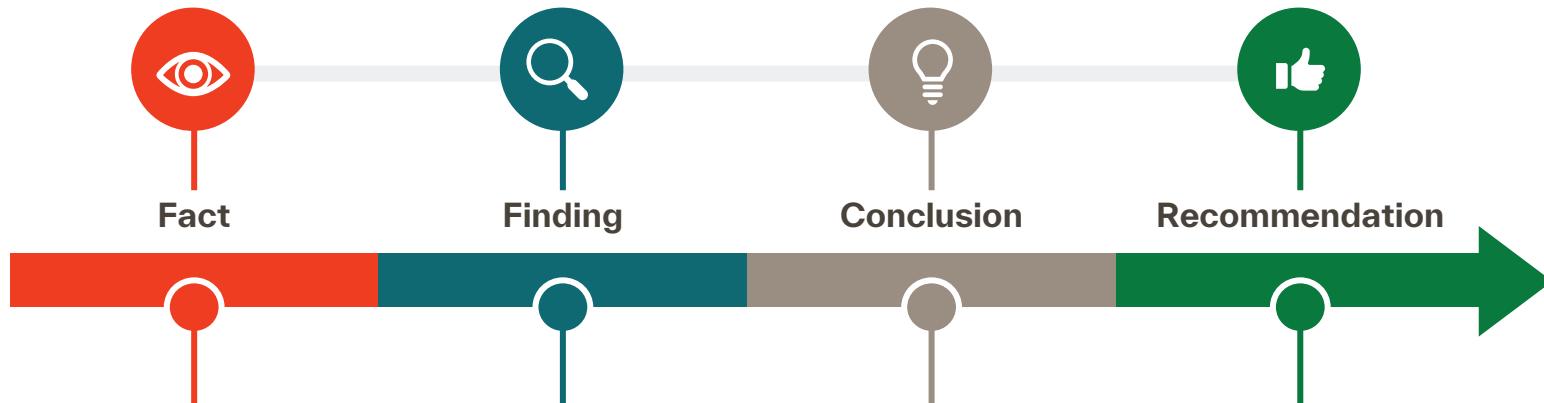
- Analyze the data gathered in the previous stage.
- Convert the analyzed data into facts and findings.
- Draw conclusions from the facts and findings.
- Arrive at the recommended solution(s) based on the conclusions drawn.

Customer interaction and communication

- Facts
- Findings
- Conclusions
- Recommendations

Building on the facts we have gathered; our insight and creativity allows us to craft our conclusions which in turn lead to recommendations

Fact to Recommendation



- An individual piece of raw data
- Reality - what exists, what is true
- Something that has happened or been done
- Something known to be true or accepted as true

- A group of similar facts
- That which is formal or ascertained by examination or calculation
- What has been learned as the result of inquiry

- Diagnostic statement of both cause & effect
- A problem or an opportunity
- A judgement arrived at by reasoning for one or more findings
- Belief or opinion which is the result of reasoning

- Specific actions to be taken
- Actions to resolve problems
- Actions to take advantage of an opportunity

Data Synthesis Sub-Phases

Sorting & Structuring –
Identifying patterns and
key trends in data

Interpreting & Validating –
Distinguishing meaningful
insights from noise

Grouping themes –
Identifying recurring trends in
qualitative or quantitative data

Comparing patterns –
Highlighting differences
across datasets

Prioritization & validation –
Confirming data relevance
using supporting evidence

Identify discrepancies –
Look for contradictions in the data

Data Synthesis Sub-Phases

Sorting & Structuring –
Identifying patterns and
key trends in data

Interpreting & Validating –
Distinguishing meaningful
insights from noise

What trends are emerging?

What story does the data tell?

What business implications or
opportunities exist?

How do these findings inform
the customer's or team's
decision-making?

Testing Conclusions

Test each conclusion to ensure that **it is clear and gives an insight** into the areas that the engagement deals with:

- Check that the conclusion does not simply re-state the problem
- Ensure that the conclusion does not state the obvious
- Test the conclusion against the findings to be sure there is a firm logical progression and that it is not possible to draw a different conclusion from the same data
- Conclusions not debatable - show your PROOF in the findings. Make sure there is proof of the business impacts too.

Validating Recommendations

RECOMMENDATIONS MUST:



Articulate action, point to an initiative



Be worded at the sponsor level



Be based on irrefutable logic



Create value for the customer



Address the engagement mandate

15

Finding Meaning Team Time

Key Habit:

Translate raw data into structured insights that guide actionable solutions

Project Activity

Synthesizing Data to Gain Insights

Key Question: What insights can we extract from our data to support our recommendations?

- What patterns emerge from the data?
- Are there any conflicting data points? How should we reconcile them?

Notes Here

- Which insights have the highest strategic relevance for decision-making?
- How do these findings validate or challenge our initial assumptions?
- Does the data suggest any unexpected opportunities or risks?

Notes Here

Project Activity

Using Data-Based Insights to Drive Strategic Recommendations

Key Question: How will we ensure our final recommendations are well-supported by data?

- How do our findings validate or challenge our initial assumptions?
- How do we translate raw data into actionable recommendations?

Notes Here

- What are your recommendations and supporting evidence?

Notes Here

16

Presenting to Influence

Key Habit:

Craft clear, compelling narratives that make persuasive recommendations

Compare & Contrast

Typical consulting introduction

HealthCareOne is a public sector hospital system that has recently deployed an online appointment scheduling system.

After an initial 3-month pilot, early data suggests a reduction in no-shows. However, some staff are concerned about implementation risks.

We recommend pairing the rollout with training, build feedback loops with staff, and phase the implementation.

Storytelling version

At HealthCareOne, appointment no-shows were climbing and overworked staff were juggling complex schedules. They piloted a new online appointment system to fix it — but some staff are uneasy about the risks of rolling it out system-wide.

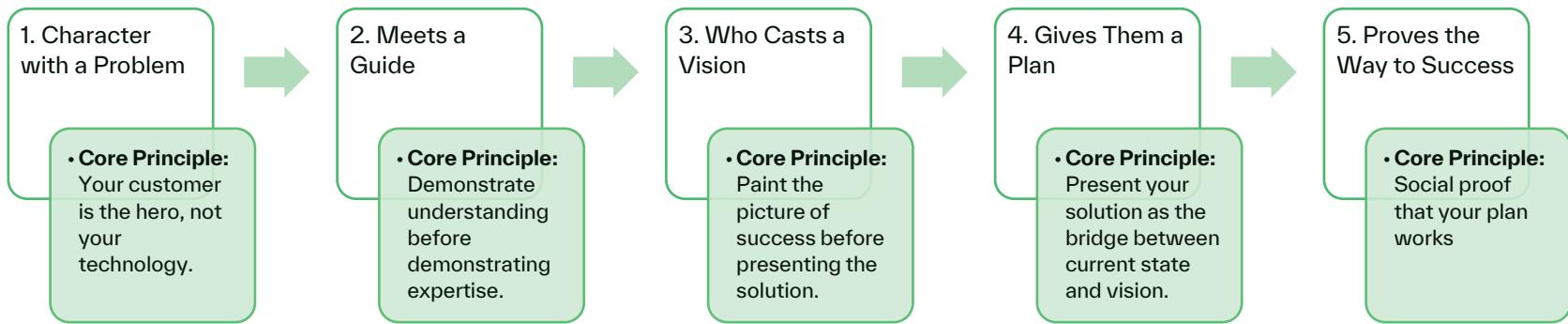
We've seen this before in other healthcare systems. New technology can cut costs and improve access, but if frontline staff don't trust it or understand it, adoption falters.

Imagine a HealthCareOne where patients get timely reminders, schedules are optimized automatically, and staff can focus on care instead of calendar management — with confidence in the system's accuracy and fairness.

Here's how to get there: pair the system rollout with transparent training, build feedback loops with staff to address concerns, and phase the implementation to learn and adjust as we scale.

A neighboring hospital network took this same approach — piloting, training, and involving staff early — and cut no-shows by 30% while increasing staff satisfaction scores. HealthCareOne can achieve the same, or more.

The 5-Step Storytelling Framework



Storytelling Example

Topic: A neighborhood community garden project.

5-Step Framework	Story Example
Step 1 – Character with a Problem	Meet Mark, a single dad in our town who relies on the community garden to feed his family fresh produce. But the garden has a 6-month waitlist, the soil is depleted, and volunteers are burning out.
Step 2 – Meet Them as a Guide	We've seen the same challenge in nearby towns. Communities like ours are finding ways to grow more food and engage more volunteers — and it's working.
Step 3 – Cast the Vision	Imagine a vibrant garden twice its current size — raised beds bursting with vegetables, schoolkids learning to grow food, and enough produce for every family that wants it.
Step 4 – Give Them the Plan	Here's how we get there: secure the vacant lot next door, recruit a volunteer coordinator, and install 20 new raised beds over the next six months.
Step 5 – Prove the Way to Success	Last year, a neighboring community used this same approach and doubled its harvest while tripling volunteer hours. We can do the same here.

Storytelling Template

5-Step Framework	Story
Step 1 – Character with a Problem	
Step 2 – Meet Them as a Guide	
Step 3 – Cast the Vision	
Step 4 – Give Them the Plan	
Step 5 – Prove the Way to Success	

Alternatives to a PPT Presentation

- ✓ Leading a walkthrough of a prototype
- ✓ Leveraging a data dashboard
- ✓ Conducting a co-creation session
- ✓ Sharing information through Miro boards
- ✓ Perform a live customer journey mapping
- ✓ Live whiteboarding of key points
- ✓ Using a simple visual artifact (process map, comparison table, Kanban board)

Driving Presentation Impact with AI

Step	What to Do	AI Use Case
1. Clarify the Objective	Know your audience, purpose, and message.	Prompt AI to help define the goal or summarize key insights.
2. Create a Logical Outline	Use a clear structure (e.g., issue → analysis → recommendation).	Ask AI to draft a presentation outline using your structure.
3. Draft Initial Content	Develop talking points and supporting content.	Use AI to write or refine sections like executive summary, problem framing, or key messages.
4. Edit for Accuracy and Relevance	Add real data, customer insights, and case context.	Review and revise AI output to reflect facts and customer tone.
5. Test for Persuasive Power	Check flow, clarity, and impact.	Ask AI to suggest alternative phrasings or simulate an executive summary critique.
6. Final Polish	Ensure formatting, tone, and flow are seamless.	Use AI to rephrase or summarize long text and improve slide narration.

Refining AI-Generated Content

Accuracy Check	Customer Relevance	Logical Structure	Persuasive Power	Business Alignment	Humanization and Context
<ul style="list-style-type: none">Are data points current and sourced?Are industry terms and acronyms used correctly?Does the logic reflect the real customer situation?Pro Tip: Look up any numbers or claims the AI generates. Validate or replace	<ul style="list-style-type: none">Is the language specific to the customer's industry and context?Are stakeholder roles, goals, and challenges referenced?Would the customer recognize themselves in the content?Pro Tip: Replace generic phrases with customer-specific insights, names, or use cases	<ul style="list-style-type: none">Does it follow a logical flow?Are transitions smooth between points?Can the audience easily follow the argument?Pro Tip: Outline the argument separately, then check if the AI-generated version matches that structure	<ul style="list-style-type: none">Are key messages sharp and specific?Are benefits clearly stated and quantified where possible?Does the tone convey confidence without overpromising?Pro Tip: Replace weak verbs and generic phrases with strong, precise language	<ul style="list-style-type: none">Does the recommendation align with strategic goals?Are risks or trade-offs addressed?Can you link outcomes to measurable improvements?Pro Tip: Use language like "supports X objective"	<ul style="list-style-type: none">Have you added real-world examples or stakeholder input?Does it reflect thoughtful interpretation and tone?Could this be spoken confidently in a live customer meeting?Pro Tip: Read the content out loud. Does it sound like you?

Techniques for Confident Speaking

- **Know Your Content** – Understand your material deeply enough to explain it without notes
- **Rehearse Out Loud and On Your Feet** – Record yourself with your phone to self-review posture, voice, filler words, and pacing
- **Leverage Pacing & Pauses** – Speak naturally, allow pauses to emphasize key points
- **Be Aware of Tone & Energy** – Show enthusiasm, avoid monotone delivery
- **Engage Body Language & Eye Contact** – Open posture, strong presence, direct engagement
- **Eliminate Filler Words** – Replace “um,” “like,” or “you know” with silent pauses
- **Read the Room** – Adjust based on attention levels, reactions, or body language
- **Anticipate and Practice Answers to Questions** – Prepare responses for likely customer or manager questions.
- **Look Like a Consultant** – Dress and speak professionally
- **Use Storytelling** – accentuate a key point and grab attention

Personal Reflection

Presenting Confidently to Establish Credibility

Key Question: How can I refine my presentation approach to deliver more compelling and impactful consulting insights?

What's one adjustment I'll make the next time I present?

Notes Here

How can I strengthen my storytelling in my consulting work?

Notes Here

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Team Retrospective

Key Habit:

Reflect on collaboration, challenges, and key learnings to continuously improve consulting approaches

Project Activity

Team Retrospection

Key Question: What were the lessons learned throughout the project experience and what key lessons will you apply to strengthen future consulting agreements?

- Reflect on team dynamics and collaboration
- Identify key learnings and growth areas
- Discuss challenges and how to overcome them
- Create actionable takeaways for future consulting projects

Notes Here

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Day 3

Reflections

Key Habit:

Reflect on key takeaways and commit to immediate application in consulting work

Project Reflection

Reflect on Day 3

Key Question: How will today's insights shape my approach to consulting and influence the way I work moving forward?

What is your biggest takeaway from today?

Notes Here

What knowledge or skill can you apply immediately on the job? How will you apply it? How do you know you've applied the knowledge or skill successfully?

Notes Here

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The Momentum Moment

Key Habit:

Challenge assumptions and embrace the art of the possible

Personal Reflection

Program Reflection

Key Question: How will you apply the learnings from this project to your everyday work?

Tomorrow: What's one consulting skill you will immediately apply?

Notes Here

30 Days: What consulting habit or mindset will you build into your workflow?

Notes Here

90 Days: What long-term improvement will you make to your consulting approach?

Notes Here