Columbia | SIPA

Capstone

Strategies for Successful Client Engagement

January 19, 2017

Welcome to Capstone!

Our goals for today

- Position ourselves to hit the ground running – starting now!
- Anticipate and avoid risks that make projects go sideways
- Learn the necessary elements of a successful client engagement
    - Scoping the work
    - Work planning
    - Sources of insight / research / discovery
    - Analysis
    - Your recommendations
    - Managing team and client relationships
- Set yourselves up for great Capstone projects

Why you?

Your value to the client

- What do clients look for in an engagement?
- What value does the capstone team add?

How will skills and knowledge you acquired through SIPA translate to your project?

Preparing for the initial client engagement

First impressions

- Building confidence of the client - from day one
- Domain knowledge / background research
- Background on the team
- Convey discipline, professionalism, and attention to detail
- Guiding and shaping the conversation

Envisioning a successful outcome

- What would constitute success for your client?
- What does a successful project entail?
- What are commonalities of high quality deliverables?
- What pitfalls might prevent a successful engagements? What can you do about them?

Your first meeting

Learning from the first meeting

- Setting goals for the initial meeting
  - What do you need to know from your client?
  - How can you help your client give you that information?
- Identifying key actors and stakeholders
- Variations in organizational culture
- How client culture might affect the team’s approach to the project
- For what audiences / purposes does your client intend to use your output (e.g. sell an idea, advance an initiative, make a decision)

Scoping the work

Defining the problem, establishing scope, and client expectations

- What does the client want? What are the client's expectations?
- What problems does the client want to solve?
    - Narrow, overly-broad, or ambiguous client expectations about project outcomes
        - How clear is the client's understanding of the problem?
        - How prescriptive is the client's approach?
    - Distinguishing between symptoms and underlying problems
    - Understanding multiple views of the problem within the organization
- Agreeing upon key questions to answer

Scoping the work (continued)

Share and agree upon your understanding of scope with the client

Objectives and Scope

Objectives

- Provide recommendations to the Division for:
  - Strategy for marketing including:
    - What industries and countries should we target via marketing, outreach, and events?
    - What networks and channels are most applicable to reach marketing targets?
    - What are the most effective uses of staff time and effort? How should resources be allocated to achieve the intended goals?
  - How can we position the Division vis-à-vis other entities including ----- and ----- ?
  - What indicators and measures of success should be established to track progress?

Scope

- The analysis and recommendations will focus on the Division
- The function, mission, and services of the Division are not expected to change
- The analysis and recommendations will suggest opportunities for improvements to strategy and process; detailed plans or steps needed for implementation are not included in the initial scope

Scoping the work (continued)

Share and align upon key question to serve as a basis for your research and discovery

Work Streams / Questions for Analysis

➢ Based on the objectives and scope outlined in the previous slide, the following work streams and major questions for analysis are recommended to guide the effort:

Strategic Context / Customer Need

- Which countries and industries present the greatest opportunities to make an impact?
- How do prospective companies that could relocate learn about New York City and the options available to them?
- What services are demanded by international businesses and their respective consulates and trade commissions?
- Which services have the greatest impact?
- What are relevant measures of success?

Capabilities / Opportunities

- What assets can be built upon? How should tools such as the ——— and ——— be used?
- Which foreign referral networks should be leveraged?
- Which other services at ——— , ——— , or at other City Agencies can be leveraged in support of the Division?
- How should the office engage ——— with respect to international business development?
- What partners or other players are key to service delivery and marketing? What additional partnerships should be forged?

Organization / Process

- How do we ensure ongoing achievement of the strategy?
- What (if any) changes should be made with respect to staffing? Is an additional person needed?
- What adjustment need to be made to how work is done or systems that support the work?
- How can we monitor the ongoing success of our efforts and inform improvements / adjustments in the future?

Work planning

Project tracking, presentation, and client deliverables

Elements of a successful work plan

- Project objectives
- Milestones
- Resource requirements
    - Who will handle what
    - Deadlines
- Cadence of meetings and expectation-setting with client

Work planning (continued)

Depending on complexity and need, can be at a summary level…

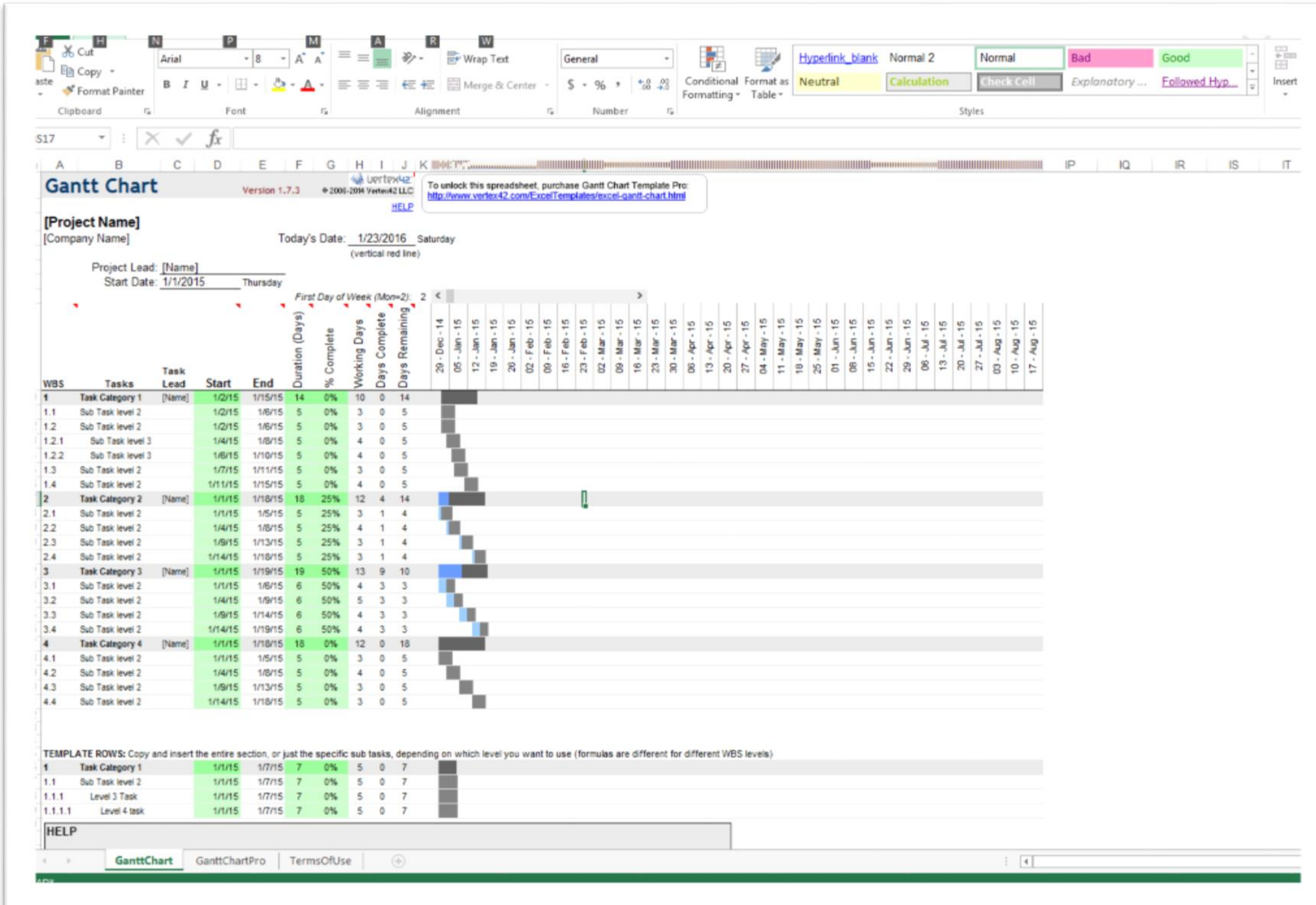
Activities, Timeline, and Deliverables

- Final deliverables will focus on recommendations for the strategic direction of the office (and positioning vis-à-vis other City Agencies) and lay out approaches with respect to marketing
- Activities and timelines should adhere to the following work plan:

	January	February 1 - 19	February 22 – March 26	March 29 – April 5
Framing / Scope	Initial conversations to lay out issues, context, and objectives for analysis	Agreement on scope / work plan		
Strategic Context / Customer Need			Review of customer interviews, staff interviews, best practices, and secondary data from EDC and other sources	**Final deliverables:** Review and finalize recommendations; Lay out next-steps and follow-up needed
Capabilities / Opportunities			Staff interviews, inventory resources, EDC and SBS discussions, partner (i.e. bilateral chambers, trade commissions) interviews	
Organization / Process			"Quick" analysis of organizational / process needed to support strategy	
Meetings / report outs				

Work planning (continued)

…or detailed



Gantt Chart
Version 1.7.3
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HELP
To unlock this spreadsheet, purchase Gantt Chart Template Pro: http://www.vertex42.com/ExcelTemplates/excel-gantt-chart.html

[Project Name]
[Company Name]
Today's Date: 1/23/2016 Saturday
(vertical red line)
Project Lead: [Name]
Start Date: 1/1/2015 Thursday
First Day of Week (Mon=2): 2

WBS	Tasks	Task Lead	Start	End	Duration (Days)	% Complete	Working Days	Days Complete	Days Remaining
1	Task Category 1	[Name]	1/2/15	1/15/15	14	0%	10	0	14
1.1	Sub Task level 2		1/2/15	1/6/15	5	0%	3	0	5
1.2	Sub Task level 2		1/2/15	1/6/15	5	0%	3	0	5
1.2.1	Sub Task level 3		1/4/15	1/8/15	5	0%	4	0	5
1.2.2	Sub Task level 3		1/6/15	1/10/15	5	0%	4	0	5
1.3	Sub Task level 2		1/7/15	1/11/15	5	0%	3	0	5
1.4	Sub Task level 2		1/11/15	1/15/15	5	0%	4	0	5
2	Task Category 2	[Name]	1/1/15	1/18/15	18	25%	12	4	14
2.1	Sub Task level 2		1/1/15	1/5/15	5	25%	3	1	4
2.2	Sub Task level 2		1/4/15	1/8/15	5	25%	4	1	4
2.3	Sub Task level 2		1/9/15	1/13/15	5	25%	3	1	4
2.4	Sub Task level 2		1/14/15	1/18/15	5	25%	3	1	4
3	Task Category 3	[Name]	1/1/15	1/19/15	19	50%	13	9	10
3.1	Sub Task level 2		1/1/15	1/6/15	6	50%	4	3	3
3.2	Sub Task level 2		1/4/15	1/9/15	6	50%	5	3	3
3.3	Sub Task level 2		1/9/15	1/14/15	6	50%	4	3	3
3.4	Sub Task level 2		1/14/15	1/19/15	6	50%	4	3	3
4	Task Category 4	[Name]	1/1/15	1/18/15	18	0%	12	0	18
4.1	Sub Task level 2		1/1/15	1/5/15	5	0%	3	0	5
4.2	Sub Task level 2		1/4/15	1/8/15	5	0%	4	0	5
4.3	Sub Task level 2		1/9/15	1/13/15	5	0%	3	0	5
4.4	Sub Task level 2		1/14/15	1/18/15	5	0%	3	0	5

TEMPLATE ROWS: Copy and insert the entire section, or just the specific sub tasks, depending on which level you want to use (formulas are different for different WBS levels)

WBS	Tasks	Task Lead	Start	End	Duration (Days)	% Complete	Working Days	Days Complete	Days Remaining
1	Task Category 1		1/1/15	1/7/15	7	0%	5	0	7
1.1	Sub Task level 2		1/1/15	1/7/15	7	0%	5	0	7
1.1.1	Level 3 Task		1/1/15	1/7/15	7	0%	5	0	7
1.1.1.1	Level 4 task		1/1/15	1/7/15	7	0%	5	0	7

HELP

GanttChart GanttChartPro TermsOfUse

Sources of insight / research / discovery

Data collection

- Information relevant to achieving results (i.e. answering problem questions) and where can it be found
  - Interviews (methods: one-on-one vs. group, in-person vs. conference call)
    - Internal stakeholders
    - Experts – help narrow your focus and identify other sources
    - Target audiences / customers / external stakeholders
  - Data collection surveys (purpose and content)
  - On-site observation
  - Secondary sources, literature and Internet searches

Sources of insight / research / discovery (continued)

Discovery and Your Research plan

- Anticipating the team's work to answer the key questions

Distinguishing between symptoms and underlying problems

Accurately plotting initial facts and hypothesis

- Anticipating the team's work to answer the key questions
- Test client reactions to your findings as you go

Using the mid-term presentation

Your recommendations

- Test hypotheses – with data and with clients as you advance
- Substantiate findings based on fact
- Avoid clichés as conclusions (there is no silver bullet, low-hanging fruit, etc.)
- Be concrete and specific
- Convey value of recommendations – if the organization heeds your recommendations, what's it worth for whom?
- Be ready to convey risks and contingencies
- Be prepared to recommend next steps

Managing team and client relationships

Managing the client relationship

- Ongoing check-ins
- Sharing hypothesis and finding – and gauging client reaction

Managing the team relationship

- Team charters
- Operating ground rules
- Roles and responsibilities
- Feedback
- Accountability
- Role of Faculty Advisor