Caption

VERSION 0.9

JULY 2022

Contents

Getting started

Audience

This course is aimed at consultants who wish to use the Red3Sixty Business builder program with their clients.

The Business Builder module should be conducted with the Business Owner, or with a senior manager who has access to all the information and people in the organisation, and the authority or mandate to implement changes.

Course materials and prerequisites

The course consists of this manual and a series of training videos that demonstrate some of the practical steps required to use the tools.

In order to benefit from the course you will need:

☑ consultant access to the Red3Sixty portal

☑ a basic understanding of the consulting process

☑ a basic understanding of how business works

Learning objectives

At the end of this course you will be able to:

☑ use the Business Builder portal to create clients and send surveys to them

☑ share the module with your client

☑ apply the modules in the Business Builder Program to your client's business

☑ manage your client consultation engagement to increase retention, renewal, and referral rates

> **TIP:** In thinking about your own value proposition and competitive differentiator consider that there is an infinite amount of advice, books, podcasts, training courses, and so forth on the internet. Your client is probably not engaging you because they need to be taught the skills — they can acquire this through self-study.
>
> Your role as a consultant is often that of curation (picking the appropriate tools and methods and concepts), providing objective and honest observations to the client, creating and enforcing accountability (see below), and providing support/help when the client gets stuck.
>
> In short, you should aim to become the client's Trusted Advisor

How to use the portal

Logging in and the dashboard

1. Go to the [Red3Sixty web portal](#)

2. Enter your email and password to enter the portal

3. Click on Forgot your password? to reset your password

4. The portal will open to your dashboard where you will get an overview of your recent activity

Creating a client

1. Select `Customers` on the left side of the `Dashboard` to see a list of all your current clients

2. Click the button to `Add Customer` on the top right hand of your screen

3. Complete all the client information

4. Once you have entered the client information return to your list of clients

5. Locate the new client on the list and click on the `Activation` button next to their entry to **send an activation email**

YOUR CLIENT FIRST NEEDS TO ACTIVATE THEIR PROFILE BEFORE YOU CAN PROCEED TO THE NEXT STEP

Sending surveys and modules to a client

1. Once your client has activated their profile, you can send forms and assign modules from the Customer Screen

2. Simply click on the `Send Form` or `Assign Module` button to open the dialogue box.

3. Your client's email address will be pre-populated in the **Email To** field.

4. Select the survey or module you require from the `Select Form` or `Select Module` drop-down box

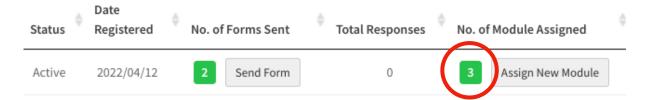5. Update the default **Email Subject** if you wish

6. Add or amend the email description if you wish. Be careful not to change or delete the {text in brackets} as those fields are used to populate the email with the correct name and links to the survey

7. Add your **name and signature** at the bottom of the email (highly recommended).

8. Click `Submit`

> **TIP** You can also send surveys and modules to multiple clients directly from the Customer screen by Selecting the `Send Form to Customers` button. The process is the same as above, except that you will have an additional drop-down field where you can select clients who have activated their profiles. Start typing the client name to quickly filter the list.

Accessing the content

Once you have assigned a module to your client, you will be able to access it from the `Customers` section of the portal by clicking on the green number under the modules column.
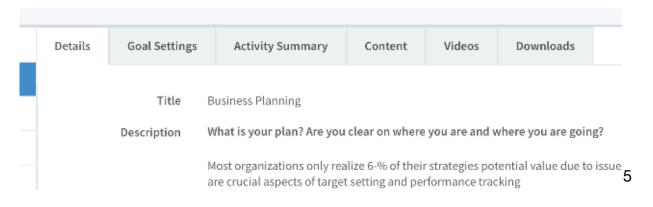
Status	Date Registered	No. of Forms Sent	Total Responses	No. of Module Assigned
Active	2022/04/12	**2** Send Form	0	**3** Assign New Module

Click on the `View Module` button next to the Business Builder to enter the module section.

#	Module Name	No of SubModules	Module Type	Development Start On	Assigned On	Action
1	Business Builder	11	Primary	—	Jun 16, 2022	View Module
2	Unstoppable	6	Primary		Apr 20, 2022	View Module
3	Access To Market (ATM)	13	Primary		Apr 20, 2022	View Module

Page 1 of 1, showing 3 records out of 3 records

On the left-hand side of the screen, you will see a list of all the modules in the Business Builder. Picking any of the modules will bring up a set of tabs as shown in the image below.

Details	Goal Settings	Activity Summary	Content	Videos	Downloads

Title   Business Planning

Description   What is your plan? Are you clear on where you are and where you are going?

Most organizations only realize 6-% of their strategies potential value due to issue are crucial aspects of target setting and performance tracking

5

- ☑ on the `Details` tab, you will get an introduction to the module, as well as some core activities to be conducted with the client.
- ☑ the `Goals` and `Activity` tabs can be used to assign and track goals for the module. See the section on managing client engagement for more on this topic.
- ☑ the `Content` tab contains links to external ebooks and other optional resources that are relevant to the module.
- ☑ the `Videos` tab contains instructional videos on how to use the primary tools in the module, or additional content, webinar recordings, and similar support materials
- ☑ the `Downloads` tab houses the tools that are referred to in the preceding tabs.

NOTE It is highly unlikely that you will need to apply all of the tools in each module. Looking at the primary, secondary and additional goals on the `Goals` tab might assist you in prioritising the exercises, but in the end, your judgment about what data your client needs to go find, or which insights he needs to uncover for himself will be the most important factor in selecting tools from the portal and supplementing it with other tools and techniques in your library.

The Business Builder Survey

Establishing the baseline

There are four opportunities to conduct the survey with your clients:

- ☑ as part of your sales process
- ☑ during your initial consultation
- ☑ to check progress and pick new priorities after you have been working with the client for 6 - 12 months
- ☑ as part of closing out the engagement with the client

You should always attempt to use the survey to establish a baseline as part of your sales process or as part of your initial consultation with your client

> **TIP** Clients will have a wide range of assessments of the relatively subjective measures for each of the questions. Some will rate themselves overly harsh, based on the scope for possible improvements. Others will give themselves higher scores than they probably deserve. See below for strategies to deal with this.

The benefits of using the survey as part of a sales process

When you are working with a prospective client, you can ask them to complete the survey on their own or complete the survey with them as part of your sales process. The benefits of using the survey as part of the process include:

- ☑ demonstrating that you are looking at the business professionally and from a holistic viewpoint
- ☑ forming first impressions about the client's personal style, capacity, and nature of their business — this also helps you to decide if this is a client that you want to help/are able to help
- ☑ obtaining some preliminary financial performance data
- ☑ giving you a view of the client's longer-term objectives in terms of growth aspirations and exit strategy

If your prospect completes the survey online, ensure that you get back to them within 48 hours of the completion to schedule a follow-up discussion where you can talk about their results and how you can assist them to improve their business.

> **TIP** If you choose to complete the survey with the client in a discussion/interview format, you get all of the benefits above, plus the benefits of using the survey in the first consultation session described below.
>
> An hour spent with the prospect in this manner is much more likely to result in a successful sale. You can position this as the first hour of consultation is FREE.

Using the survey as part of your initial consultation

If you have just met the client, establishing trust and rapport is one of the critical goals of your first consultation session. See the section below for some more suggestions on the all-important first session.

Talking through the survey with the client has the following additional benefits over and above those listed above:

- ☑ engaging the client in a question and response dialog format sets the tone and expectations for how the coaching relationship will work
- ☑ you start building trust with the client as the survey encourages them to disclose information about their business that they would not normally disclose to strangers
- ☑ you are able to explore why the client rates certain answers high and certain answers low, which gives you some ideas of where they see the opportunities, challenges, and strong points of themselves, their teams, and their business
- ☑ you can gently calibrate some of the answers towards more realistic assessments, by asking probing follow-up questions if the client is scoring consistently high and consistently low.
- ☑ you can identify and even possibly decide on the one or two key priorities to focus on in the coming months. The process will make the client realize or believe that there are a large number of areas that need their immediate attention. Your job as a consultant is to assist them with the one or two that will make the most impact, and guide them through the journey in a logical manner.

> **TIP** In this session consider using only your coaching skills and leave your analytical mind behind the screen. Open, curious questions will elicit a lot of information that will be useful in your future work.

Evaluating the survey scores

> **IMPORTANT!** In the Business Builder modules, there is a lot of information on how each of the modules supports the core business activities. It is necessary to be familiar with and understand this in order to be effective in applying the survey results.

As mentioned above clients' subjective assessment of their own business will vary significantly from one business to the next. Over time you will form your own impressions of the true score for each area and what the types of questions are that would give you a better view of the actual situation.

You will also be able to judge fairly rapidly if the client is overly harsh on themselves, or have a realistic view of their business, or are being overly generous in their assessment of themselves. This might be based on a lack of knowledge of the required skills and processes, a lack of deep reflection on the business, or simply protecting the ego if this is a client at the beginning of their journey.

You have to decide for yourself if you wish to challenge the client's assessment and potentially make it harder to build trust and rapport, or if you will use their assessment to deepen the conversation about core focus areas. Be guided by your own coaching style and preferences in this regard.

Whichever approach you choose will result in the highest-scoring area, the lowest scoring area, and a spread in between. In collaboration with the client you apply the results as follows:

1. Link the lower scores together to identify the core challenge that the business is facing. Examples are finding new customers and growing revenue (marketing, sales), delivering on promises (capability, governance), managing the cash (financial, governance) or strategic direction (planning, innovation).

2. Check if this is the burning platform — a business that is struggling to generate sufficient cash to pay its bills should probably be driving sales and delivery and cash management rather than a marketing strategy

3. Pick one or at most two of the modules as a priority for the coming months.

4. Check if these modules are dependent on other modules (for example you can not drive innovation if you do not understand your target markets and customers)

5. Capture these areas as immediate Objectives for the program, and if it makes sense, establish some Key Results to target (OKR methodology)

Using the survey as a periodic look-back and redirect

After you have been working with the client for a period of time, you can use the survey to check if you and the client have been delivering on the intentions set in the first session.

These are some considerations in choosing when to do the survey, and how to manage the responses:

- ☑ you will typically not see much progress in hard, measurable performance in the first 3 to 4 months. After six months you should have some short-term wins and some changes in tools, behaviors and other deliverables from working with the client

- ☑ after 12 months there should be some key measurements or KPIs that you will have established with the client, and these should start giving a sense of the business performance

- ☑ you should by now have a relationship built on trust, collaboration, and rapport. Your client will be much more open about the "dirty laundry in the back room" of the business, and your conversation will be much more intentional and productive than the first session

- ☑ with a deeper understanding of what appropriate and excellent performance looks like, your client might assess themselves lower than they did when they did not have the knowledge that you have been imparting to them

- ☑ you should definitely do this at the end of the agreed engagement as part of a close-out and next steps discussion with the client

Taking all of this into account, we recommend that you have the original baseline assessment available, and compare the new results with the old ones. You could even use the baseline results as a prompt in the review by asking how much the client thinks they have improved the score since the baseline was done.

If the client ranked themselves excessively high in the initial baseline, you could also turn the question around and ask them if they would now rank themselves lower than they did at the time when you started the engagement with them.

Either way it is useful to show the improvement. Capturing the baseline and new scores in a spreadsheet is a powerful demonstration of the actual improvement.

The purpose of this exercise includes:

- ☑ allowing the client to reflect on how much progress they have made and celebrate the wins

- ☑ getting an extension of the contract if you are doing this at the end of the first agreed engagement period

- ☑ deciding which areas that you worked on are now good enough to run for a while, and picking the next priority areas to work on

TIP The incremental benefit of doing more than 1 or 2 of these check-points is dependent on yourself and the client. However, as the scores are subjective too many repeats could result in a "ticking-the-box" exercise which is not constructive.

After 12-18 months you should have migrated your client to more meaningful objective KPIs during the consultation, and you should have real hard data to support conversations about the next round of performance improvement initiatives.

The Business Builder modules

The business builder modules cover a broad spectrum of activities in your client's business. They can broadly be grouped into the following areas:

1. Product/market fit: market segmentation, finding and growing customers

2. Revenue growth: marketing strategy, sales performance

3. Operational performance: capability, financial management

4. Capacity for growth: managing the optimal team, Innovation

5. Driving towards future goals: business planning, governance

There are obvious dependencies and overlaps between these, but it is useful to have a simplified framework to help your client understand where these fit into the big picture and how they link to each other.

You do not have to do the modules in the order that they are presented in the portal — the implementation sequence should be part of the outcomes of your analysis of the survey results and initial engagement with the client.

TIP: It is often useful to have your client look at the Business Model Canvas videos in the Business Planning module as part of their homework after the first session, and start developing a working Business Model Canvas (BMC) in the second session. You can refer back to, improve and enhance the BMC as you go through the program.

It is not the intention of this manual to describe the individual tools in each of the modules, but rather to give a sense of the types of analysis and conversations you should do with your client as part of the module.

In the text, the applicable tools will be shown in brackets where possible.

Module 1 - Business Planning

Most organizations only realise 6% of their strategy's potential value due to issues in development or execution. In this module, we review the crucial aspects of target setting and performance tracking.

The purpose of this module is to help the client understand how their business functions (Business Model Canvas) in their specific operating environment (PESTLE, SWOT, Five Forces).

It encourages the owner to think about the longer-term strategic direction (Growth Planning, Business Planning, Growth Rate Calculator) and set goals, targets, and measures to check progress and stay on track (Balanced Scorecard).

Other concepts and tools that could be useful include OKR (Objectives and Key results), discussing Vision, Mission, Purpose, or similar long-term topics.

Some consultants find it useful to split business planning into the two activities of

- ☑ *Strategic thinking*: what is our vision, purpose, and values; where do we want to go with the business in the medium and long term; what are our priorities and challenges that we need to overcome; where and how do we generate growth, etc.

- ☑ *Execution planning*: what projects, tasks, and initiatives do we need to execute in the next 3 to 12 months to move us closer to our goals; how will we measure success on these initiatives; who will be accountable for delivering them; what conversations will we have every month to ensure that we remain on track.

TIP: Your client has probably engaged you because they do not have clear goals, or are not effective at executing their plans. It might be useful to gently test their current planning capability, and then circle back to Business Planning later in the engagement when they are more familiar with the processes that they need to master and the gaps to close between current and desired future state.

Business planning is also an activity that should be conducted at least once per quarter and reviewed monthly for progress, so including this as part of your monthly conversation will help your client develop the habit of switching context between operational and strategic more often than once a year.

A different way to think about **Budgets**

Many clients resist the idea of setting and tracking Budgets and view Budgets as boring or restricting or unnecessary. You should address these historical and inaccurate perceptions early in the planning process.

A suggestion could be to tell your client to forget about Budgets and start talking about Targets and Resources. To the untrained eye, these look exactly like Budgets as they use the same format as the income statement: monthly and annual revenues, cost of sales, gross margin, overheads, net profit, etc.

The three key differences between Budgets Targets and Resources are this:

- ☑ Targets show how much your client plans to grow their revenues. You could even split these into the Ansoff categories of revenue growth from market penetration, revenue from new products, new customers, new geographies, etc. These are effectively your sales team's targets (retention, growth, new business)

☑️ Resources reflect the monetary value of the resources required to deliver those targets. Material costs, staff, equipment, facilities, energy, communications, marketing, and all the other Cost-of-Sales and Overhead line items reflect the allocation of money towards resources that are planned to be utilised or consumed in creating the Value Proposition and delivering it to the customer.

☑️ While budgets appear to be cast in stone, Targets and Resources are flexible and under the control of the client. If they are not achieving their targets, they need to review the impact and allocation of resources or change their targets to what can be realistically achieved with the available resources. If they are exceeding their targets, they have additional cash which can be applied to more resources required to deliver value to the customer or invest the extra resources into even more growth.

The Business Model Canvas illustrates this concept very effectively with the way that the Costs and Revenue boxes are linked to the left and right-hand sides of the canvas respectively.

Your client will not achieve significant changes in meeting their targets (revenue growth) without changes in the allocation of resources (overhead and other costs). Part of your job as a consultant is to help them understand this and teach them to estimate and manage their Targets and Resources more accurately and realistically.

Module 2 – Product/Service Innovation

To ensure continued relevance and increased sales an innovation process needs to be developed and implemented. To ensure growth and sales increase both markets and competitor trends should be monitored. Based on market demand and not lack of sales a formal innovation process should be adopted.

The purpose of this module is to help your client assess their readiness to do innovation (Innovation Tool Review, Product Development Maturity Scorecard).

It also teaches them how to do structured innovation and product development (product development process diagram) and how to measure and guide their teams in delivering profitable innovation (Product Roadmap, Product Profitability).

> **TIP:** Research and Development is expensive and should be carefully considered in the context of the company's target market and competitive environment. If it is a core strategic differentiator or requirement you can place a much more intensive focus on the effectiveness of the innovation process.
>
> In many cases being second-to-market through copying other innovators or localising international ideas/business models might well be sufficient for your client to develop a competitive advantage.

The Ansoff matrix is a useful tool in this module to structure the conversation with your client towards OKRs or projects that will leverage the existing company strengths and reputation into new products and services.

Module 3 – Market Definition

Market development and penetration should form the core focus of all your client's growth activities. Growth should be actively targeted over and above the function of maintaining the current performance. Growth activities should be linked to market opportunities and not resource availability.

THIS MODULE IS CRITICALLY IMPORTANT

… it helps your client to truly understand where their opportunities lie (Market Research, Market Segmentation) and how the customers make purchase decisions (customer profiling).

Module 4 – Finding and Growing Customers

In order for your client's business to succeed they have to ensure they are adding a consistent number of new customers, while at the same time ensuring existing customers are retained (Customer Satisfaction Survey, Customer Lifetime Value Calculator).

Your client needs to develop a monthly sales plan targeting the required revenue targets, including items such as the number (or value) of new customers with relevant product or service revenues linked to the overall strategy they are aiming for. After setting these targets they need to manage and measure the pipeline effectiveness (CRM Maturity Assessment).

> **TIP:** This module is tightly integrated with your work on sales efficiency (Pipeline Conversion) as well as your marketing strategy (Lead Generation). All three of these components have to work to firstly grow your client's revenue, but secondly diversify their customer portfolio to reduce revenue continuity risk.
>
> If more than 20% of your client's revenue comes from one key client, they should not only be focusing intense effort on retaining that customer business but also as much if not more effort on finding other customers.

The Ansoff matrix is also a useful tool in this module to structure the conversation with your client towards OKRs or projects that will leverage the existing company strengths and reputation into market penetration as well as find new customers and markets.

Module 5 – Capability to Deliver

For your client's business to grow it must be able to consistently deliver high-quality products or services. In order to do this, the right capabilities and competencies need to be in place.

In this module, you will guide your client through a core competencies assessment to identify their strengths and opportunities for recruitment and development.

TIP: If your client is a small business owner or a solopreneur, this assessment could feel stilted and mechanical. In that case, it is often more constructive to use the questions in the assessment as the basis for a development program for the owner.

ANOTHER TIP: If your client has identified the need to recruit additional staff, this schedule in combination with the activities block in the Business Model canvas could be useful to guide the owner in recruiting for the required skills by answering the questions:

☑ what activities does this person need to do

☑ what capabilities and skills does the person need to succeed at these activities

☑ how will we measure the successful outcome of these activities (metrics)

Simplistically stated high performance employees are those that have the right skills, the right tools and processes, and the right attitude to their job. Having the right skills, tools and processes is 100% the responsibility of the business owner, as they are the ones who decide what activities should be performed by the employee, and they will recruit, train, and equip them accordingly.

Attitude is a bit more nuanced, and goes into the area of motivation and leadership, but it is fair to say that this is 50/50 between the business owner and the employee. The business owner and leaders define the inclusive environment with the desired behaviors (values and culture) for the team, and the employee should bring their professionalism, passion, and commitment to the work. Recruiting for fit-in values, behavior, and attitude is also the responsibility of the owner, so the bulk of accountability for capability sits with the owner.

Module 6 – Business Finance

If cash flow is the blood of your client's business, financial management is the heartbeat. Many smaller businesses fail dismally in this area, and it is a critical barrier to scaling up. The key question here is: How well is your client managing cash flow, margins, and profitability?

Our recommendation is that you link this module to an accounting professional for the more technical components (Income Statement, Cash Flow Forecast, Balance Sheet) if you are not familiar with the financial concepts, or go on a training course yourself — typically courses such as Financial Management for non-financial managers would give you sufficient background to be able to assist your client with identifying gaps in this module.

As a business improvement consultant, some of the core outputs you should drive your client towards are:

- ☑ a break-even analysis if your client does not know if they are profitable, or how much revenue they need to generate to break even

- ☑ the use of a formal accounting package to manage the business finances (remind your client that in order to get a loan, investment or good selling price for their business everyone is going to ask for 3 years of audited financial statements)

- ☑ basic familiarity with income and expense statements

- ☑ budgeting aka goal setting (see the comments about Targets and Resources under business planning)

- ☑ the finance drumbeat — what are the activities, meetings, reports, conversations and decisions that I need to do every day, every week, every month, every quarter, every year.

Managing cash, invoicing, collecting credit, paying suppliers, budgeting, reviewing actual vs planned expenditures, building reserves, making investment decisions and a myriad of other activities related to managing the blood and heartbeat of the business needs to become a habit that done in a regular, measured and controlled manner for your client to scale up.

Module 7 – Marketing lead generation

In today's saturated markets helping to differentiate your client's offering from their competitors are a must if they are to succeed. Competing is not about lowering prices but more about researching and understanding their competitor's strategy and positioning their business for success.

Simplistically put the purpose of marketing is to build awareness of your client's solutions in their target markets, and then generate enough trust that customers wish to know more (these are your leads). The quality of your leads is highly dependent on really clear outputs from the market segmentation and customer profiling work in other modules (also see Business Model Canvas and Value Proposition mapping) as these will guide you on WHERE your resources should be focused to reach your target market with the messages they will respond to.

The module contains a number of tools to assist with lead scoring and prioritisation and calculating the effectiveness of your marketing funnel. These should be linked to the sales CRM process so that your client has clear end-to-end metrics on how well their revenue generation activities are working together.

> **TIP:** A very useful tool in this conversation is Customer Value Proposition mapping to really help your client understand what problems they are solving and for which customers. Combining this with customer profiling (customer avatars) will inform your client which channels to use to reach those customers. Understanding the pains and gains and

decision-making processes of the customers will help direct your client's marketing efforts toward generating high-quality leads.

Module 8 – Sales Plan Delivery

If Marketing is about building awareness and trust and results in leads, Sales is about converting as many as possible leads into orders. In order to effectively deliver and manage sales your client has to measure sales performance on a weekly and monthly basis.

For sales to deliver on targets there has to be a business-specific sales process and sales funnel (Sales Forecasting Tool). There are spreadsheets, sales pipeline software tools, mailing list managers, and CRM systems that will manage the entire sales process from lead to order, and even manage after-sales inquiries, service calls, and so forth. If your client deals with a large number of inquiries on a daily basis, this type of tool or system would probably be one of the early IT systems that they should invest in after an accounting system.

The module also has a sales skills assessment tool to evaluate your sales team.

TIP: Sales, and especially pricing, is usually one of the last functions that small business owners delegate as they scale up, given how critical it is for the revenue of the business. However, as the majority of business owners start out by doing something technical (accountant, baker, plumber) it is highly likely that they do not have professional-level selling skills.

Using the sales skills assessment with the owner in a conversational fashion can be a useful intervention both in helping them identify and develop their own skills gaps and in understanding how to recruit skilled sales staff based on ability, rather than first impressions and charisma.

We know, after all, that conversational interviews are one of the worst possible ways to recruit good staff, and that good salesperson are exceptionally talented at looking good in first impression conversations.

Module 9 – Managing Optimal Teams

The most important aspect of helping your client execute their strategy is ensuring all their resources in the business are aligned to achieving its goals. If the people in their business are not 100% aligned with the business vision they will not be able to deliver effectively.

This module does not deal with the critically important components of culture, motivation, leadership, inclusion, values, and all the other tools available to leaders to encourage optimal performance.

We have also referred to recruitment and skills development in a number of other modules, and managing the optimal team is based on having the right skills, tools, and attitude in the employees — the responsibility for putting this in place lies mostly with the business owner!

However, once the team has been assembled, trained, and equipped, the management of the performance of the team comes into play. You will use this module to give your client a starting point to assess their own management and leadership maturity, determine development plans for various staff members, develop performance management frameworks, defining roles and responsibilities (org chart).

> **TIP:** Solopreneurs, freelancers, and small or micro-businesses with less than 5 people will often not see value in talking about this. However, it is important to remind them that they need longer-term strategic plans for resource development and that they should still measure and manage how the team interacts and performs!
>
> The Management Leadership Maturity Assessment is a useful tool to complete with any business owner, even if it is brought down to a less rigorous conversational level, as this will identify areas for capability development that will prevent the business from scaling up at some future date if it lacks these capabilities.

Module 10 – Governance and Compliance

Corporate governance is as vital to SMEs as it is to large corporations. Implementation of cost-effective and simple mechanisms and processes will establish structure, improve operations, contribute to business growth and ensure effective compliance with the law.

This module is heavily focused on more formal governance structures for larger companies (such as boards, shareholder roles and responsibilities, and so forth).

For smaller entities the following governance considerations could apply:

- ☑ Legal compliance to be able to continue operating the business (labor laws, health and safety regulations, and other similar regulations)
- ☑ Tax compliance
- ☑ Quality, shareholding, ESG, or other requirements that large corporate customers or governmental customers might have

> **TIP:** The development of simple policies over time is a significantly easier task than going from having no policies and procedures to having a full-blown governance system.
>
> Encourage your client to create, review and amend one-page policies and simple Standard Operating Procedures (SOPs) whenever operational requirements change as the business grows, or as there are changes in their broader business environment. Policies and SOPs need not be long, complicated documents!

Managing the consulting process

The following section will cover a few suggested best practice techniques for managing the Business Builder program, but these can be applied to any consulting engagement/retainer that covers an extended period of time. These are the opinions of the author, and you should find your own rhythm and tools that fit the way that you think and work.

The first meeting

The main goals of the first meeting are:

- ☑ starting to build trust and rapport with your client — you will need this later on when you need to help them discover and deal with unpleasant truths about their business models, staff members, own behaviors and assumptions, etc.

- ☑ getting an understanding of your client's preferred styles (detailed vs high level, cautious vs adventurous, data-driven), how they balance emotions and logic, and what are their values around people, customers, etc.

- ☑ get to know how your client's business functions at a high level — how do they make money, how many people they have, what is their geographic scope, what are their target markets, products, and services, and current challenges

- ☑ agreeing on one or two priority focus areas — ideally guide the conversation to areas where it would be possible to show some early gains and benefits. You can use the Business Builder survey to guide this conversation. These priorities can always be revisited as you build a deeper understanding of the true challenges in the business

- ☑ getting a commitment from the client to work with you for at least 3 to 6 months, including showing up for meetings and doing the homework between sessions

Some of the types of questions that will be useful in this session could be

- ☑ *Building rapport*: When did you start the business? What were your dreams and aspirations? Can you remember how it felt when you got payment on your first invoice? What were the things that made you leave your job (if they left the corporate environment to start their business)

- ☑ *Business model and market:* What are your most successful product or service offerings? Who is your biggest customer? Which industry/market do you like working in most?

- ☑ *Current challenges*: What worries you most about your team? Suppliers? Financial performance? Market conditions? Geopolitical, social, environmental, or other macro trends?

☑️ *Strategic direction:* What do you plan to do with the business in 5 to 10 years? How many people would you like to employ? How much profit do you want to make in 5 to 10 years?

The most important preparation you can do for this meeting is to cultivate an attitude of curiosity and attentive listening. This is not yet the time to give advice and instructions (it is probably never a good time to give instructions).

Scheduling meetings

Meetings should be focused on helping your client make steady progress on the work, with opportunities to fail and the ability to get help relatively close to the point in time where they get stuck.

We would recommend more regular, shorter contact sessions rather than one long session once per month. The benefits of this include:

☑️ more regular meetings mean that the work remains top of mind

☑️ it is difficult to get through a lot of work in a long meeting, especially if your client needs time to reflect, gather input from team members, or do research. Attention span and mental exhaustion — especially in intense working sessions — also reduce the value and impact of long working sessions

☑️ the client might run into difficulties or questions as they work on the content between sessions. More regular sessions mean that learning happens closer to the point of getting stuck, when the challenge is fresh in your client's mind

☑️ we would recommend having "office hours" or something similar for your client to have a short 20 minutes call with you when needed between sessions, to deal with one or two specific questions that they need help with, and for you to check progress and make sure that the work remains top of mind

☑️ if possible, pick a regularly recurring time slot (e.g. every Monday afternoon at 15:00) so that your client gets into the habit of regularly allocating time towards working ON their business as a priority time block every week

Depending on the nature of your retainer, meetings of 45 - 60 minutes or a 60-90 minutes meeting every second week would be preferable. If not feasible, one long meeting with a short weekly contact via phone, WhatsApp or other communication channels would be suitable.

> **TIP:** We recommend the use of an online booking portal that integrates with your calendar and allows your client to schedule and change their meetings to fit their own schedule. A number of these portals also send email, SMS, or other reminders to your client.
>
> In practice, such reminders significantly reduce the number of last-minute cancellations or no-shows, which gives you more control over your own time allocation.
>
> It also reduces or removes completely the need for you to spend time phoning, emailing, or messaging clients in a to-and-fro dance to find an open slot in both calendars.

Managing the meeting agenda

One of the terms in your agreement with your client should deal with the issue of paying per hour or paying for value. If you are able to move away from an hourly rate, you can agree with your client that the meeting agenda will cover all the questions that need to be answered, and that the meeting is over once this has been achieved.

This avoids uncomfortable situations where the meeting was effective and impactful, but shorter than planned, and now you are trying to find something to fill the time. Your client might be quite happy that the meeting ends earlier than planned if they have made significant progress towards the goals. Very few business owners and senior managers will be annoyed with getting a bit of extra time in their schedule.

In a typical meeting your agenda should cover the following:

- ☑ Checking in: how is the client doing, what is happening in the business. The purpose is to re-connect with the client and bring them out of the long list of operational things they are thinking about, and into a space of learning, curiosity, and thinking about the business as a whole. It also gives opportunities to celebrate wins with your client.

- ☑ Update on work-in-progress, homework, and action items from the previous session. The purpose of this is to hold the client accountable for doing work on their business so that they make progress on getting good outcomes, and help them if they got stuck. If your client is consistently not doing the work between sessions, you might need to coach them through the blockers that they experience, and evaluate if this is a valuable use of your time and effective use of resources for your client (i.e. are they wasting your time and their own money?)

- ☑ Knowledge building: introducing your client to the planned module for this session and core concepts. You can link this back to the Business Builder survey questions, recommendations, and summary from the portal. You could ask your client to go through this material prior to the session and use the time to check if there is anything they need help understanding or any questions they have discovered. Although this is a more efficient way of learning, there is a fair chance that your client did not allocate time to do this preparation before the meeting.

- ☑ What next: what is the "homework" for the next step — agree with the client on what they will be working on to discuss or report back on during the next session.

If you are dedicating more than one session to a module the conversation might build on the previous session's knowledge building, or assist the client in applying the learnings from the previous session's homework to their business.

In structured training programs, it is often useful to spend no more than 50% of the time on the formal content and knowledge building, and the remainder of the time on the work-in-progress. This would be a specific improvement project that the client is implementing over the course of a few months (e.g. improving sales through staff training, implementing a pipeline and CRM system, moving towards setting sales targets, etc.) based on the needs assessment you did during the program onboarding / first meeting.

One of the objectives of every meeting should be to improve the relationship with your client. Try to establish a habit of reflecting on the meeting after completion, and include the quality of the relationship with the client in that reflection.

TIP: Try to manage the meeting in such a way that there are at least 15 minutes available at the end to discuss anything else that the client has on their mind. This is a very powerful way to get your client to open up about deeper problems in the business, which are sometimes not related to the current module.

This not only reinforces the trusted advisor position but allows you to continually check that you are working on the most critical improvement area of your client's business.

Maintain continuity in your conversations

If you have multiple clients or long delays between meetings, you will forget what topics were discussed in the previous session and which actions were agreed on. You cannot rely on your client to do this either.

Therefore you need to take notes during meetings, and need a system to keep track of the notes, agreed actions, ideas, challenges, big wins, etc. You can use a pen and notebook, or implement electronic note-taking software in combination with a task or project management system. The most important consideration is that this needs to be a system that fits with the way you work, and that is easy to use in a disciplined manner.

There are modern SaaS workflow/project management / collaborative tools that allow you to do all of this in one integrated platform — such a content and process management system will allow you to scale up to multiple consultants serving multiple clients if that is your strategic goal for your consulting practice.

Before your session with your client, you should at the very least go through the notes and actions from the previous session, to remind you of the conversation you had. You need to prepare an agenda that should be written down or managed in your SaaS workflow tool. You can add a personalized reminder to this agenda (e.g. ask how the meeting went with the large new proposal your client was stressed about last time you met, or how their son's birthday party went).

Become the trusted advisor

Finally, remember that your relationship with your client is ultimately a person-to-person relationship.

Although you should deliver objective and professional support to your client, make sure to build rapport and a personal connection at the same time. Discussing little snippets of your own and the client's personal life, making the odd joke or two (be careful of offensive material) or a discussion about a topic of interest will make you more human in the eyes of

your client. Similarly, you will get to know something about them as a person as well during your time together.

This is 10 times more important if you are working remotely over Zoom or a similar tool. Where possible have enough bandwidth to share your video stream with the client and encourage them to switch their camera on so that they are talking to a face, not a computer screen.

Ensure that you maintain the balance between personal relationship building and time in chit-chat, doing the work over time, and most importantly finding your own sweet spot in how to connect to your client in a way that works for both of you.