

WhitewaterTx Onboarding

Cohort Connection 5

Welcome: Today's presenters



Adam Salzer



Niel Malan



Joe Zhou



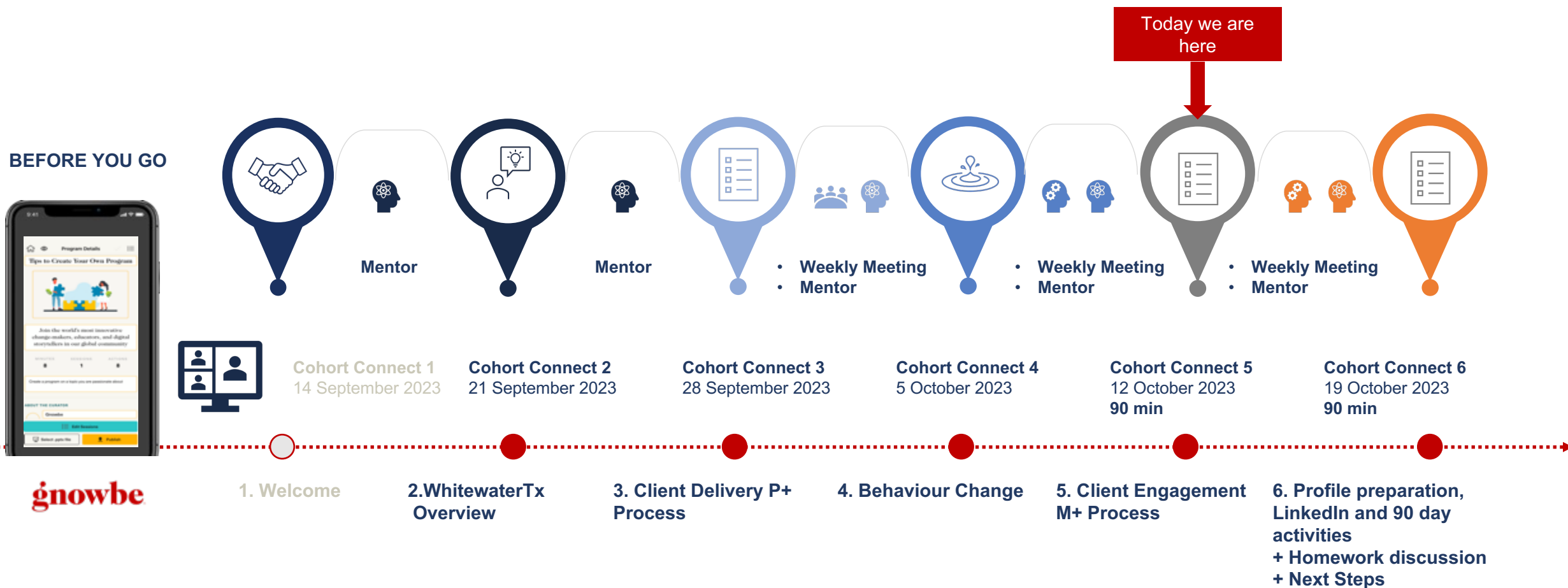
Robert (Raj) Bruce

Agenda

1. Onboarding reflections and Q&A
2. Revisiting the M+ Process
3. Breakout Session 1: Engage in M0
4. Client Engagement Experiences
5. Breakout Session 2: Client Engagement Role-play
6. Next Steps
7. Closing, check-out, and key takeaways



Onboarding learning journey

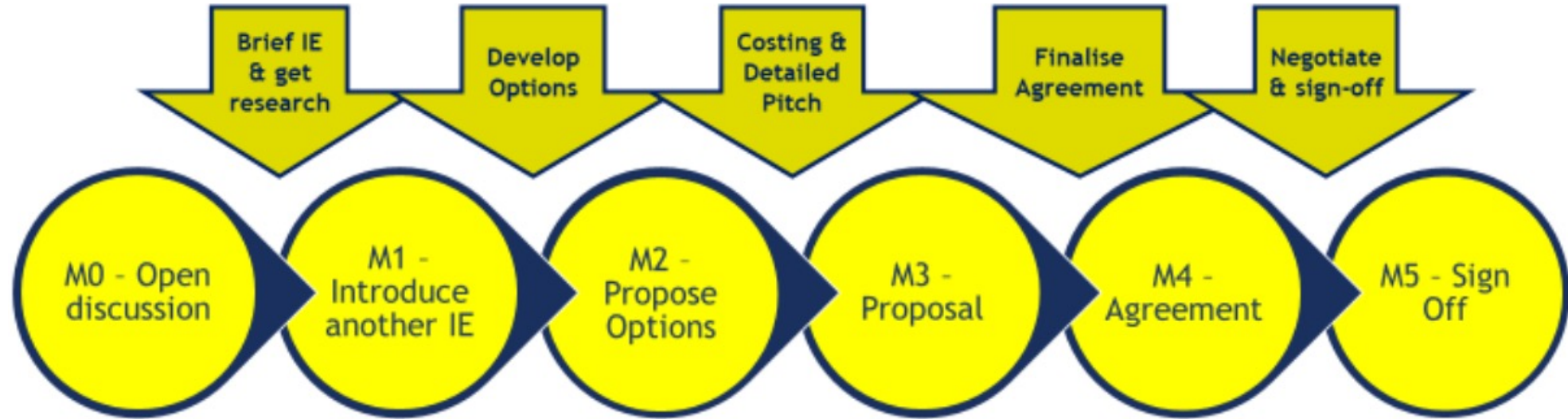


Onboarding reflections and Q&A

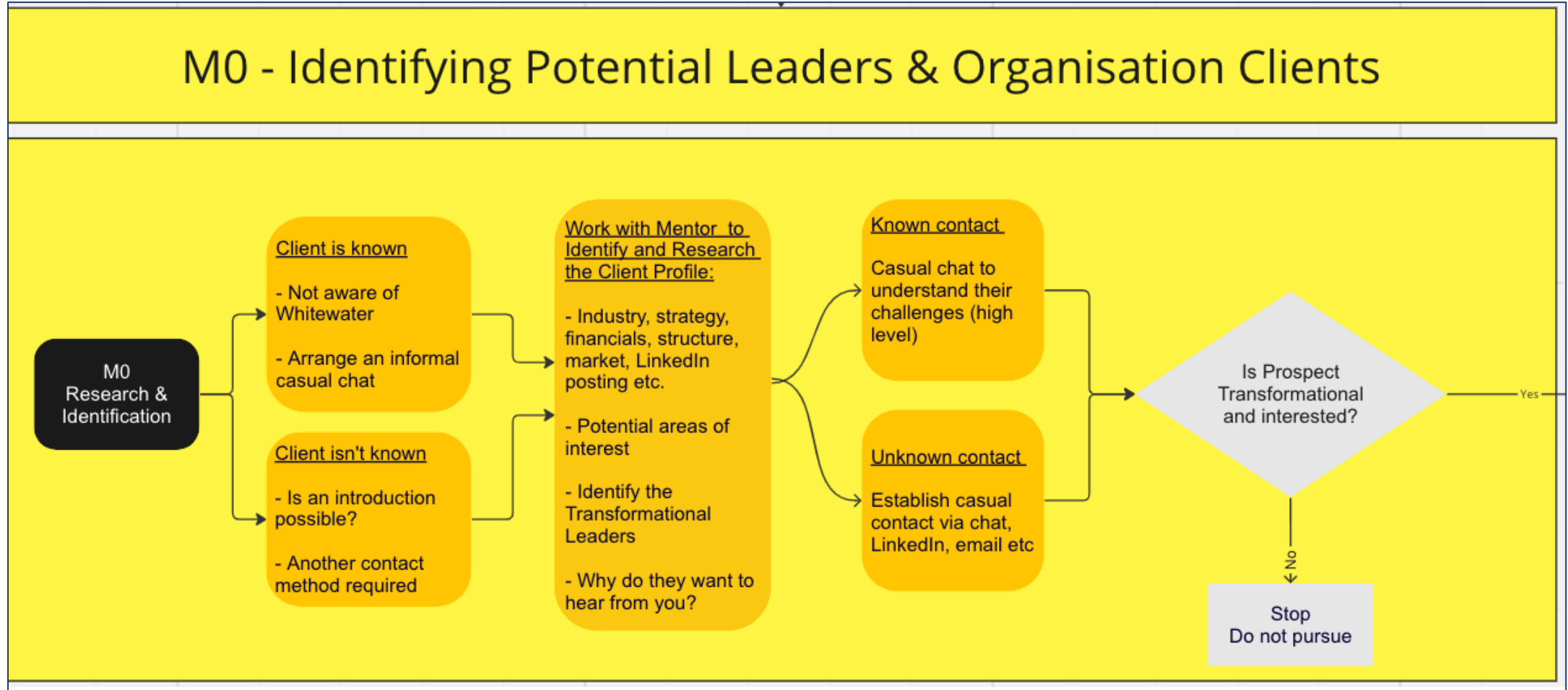
Checking in ...



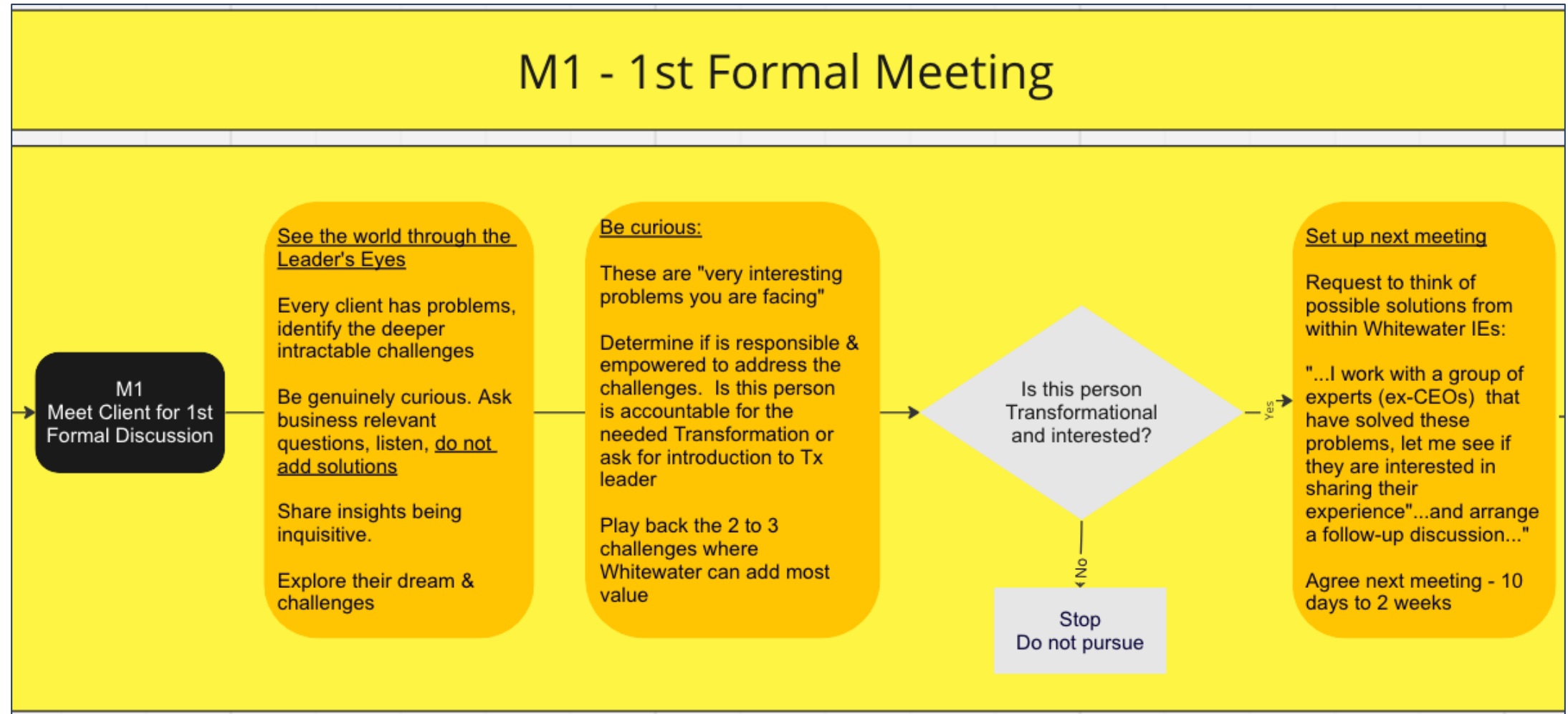
M+ Process overview



M+ Process overview



M+ Process overview



Breakout Session: Instructions

Reflect on and strategise around the challenges encountered during the initial explorations of the M+ Process.

1. Individual reflection

- **Action:** Reflect on your challenges and strategies client engagement phase in the M+ Process.

2. Group collaboration and synthesis

- **Action:** Share and explore commonalities and variances in your experiences.
- **Outcome:** Derive insights and collective wisdom from your shared experiences.

3. Reconvene and collective sharing

- **Action:** Reporters share synthesised insights and findings with the main group.
- **Roles within the group:** Chair | Reporter | Timekeeper



Client Engagement Experiences



Conclusion

- Many IEs struggle to start the selling process
- Adam has found that the best way to start is to not to sell...
- ...and try not to mention Whitewater unless asked
- Also, do not try to solve the client's problem
- Start with a genuine interest in understanding the potential client's problems

Method



SNIFF - Be curious. What challenges does the client face?



REFLECT - Reflect the client's words back to him. E.g. client "geopolitical risks in the supply chain are very troubling". You "Many find geopolitical risks re creating a supply chain problem - which risk is your greatest worry?"



RADAR - Look for the challenges that Whitewater might be able to help with, but keep these to your self until the end of the discussion



WRAP - At the end say something along the lines of... Problem A and problem B are very interesting. Let me talk to a colleague who has expertise in this area and see if he has any ideas you might find useful

Breakout Session: Instructions

Now, let's try it out ! Explore M0 Client Engagement through Role-Play

Agenda:

1. Role-Play scenarios (5 min each - then switch)

- Act as CEO, WhitewaterTx IE, or Observer.
- Practice starting genuine, strategic conversations.
- Observers: Give feedback after the 2 conversations

2. Group sharing

- Observers: Share your group's experiences and learnings with everyone.

Your roles:

1. CEO: Engage in the conversation.
2. WhitewaterTx IE: Navigate the dialogue strategically.
3. Observer: Watch and provide feedback later.



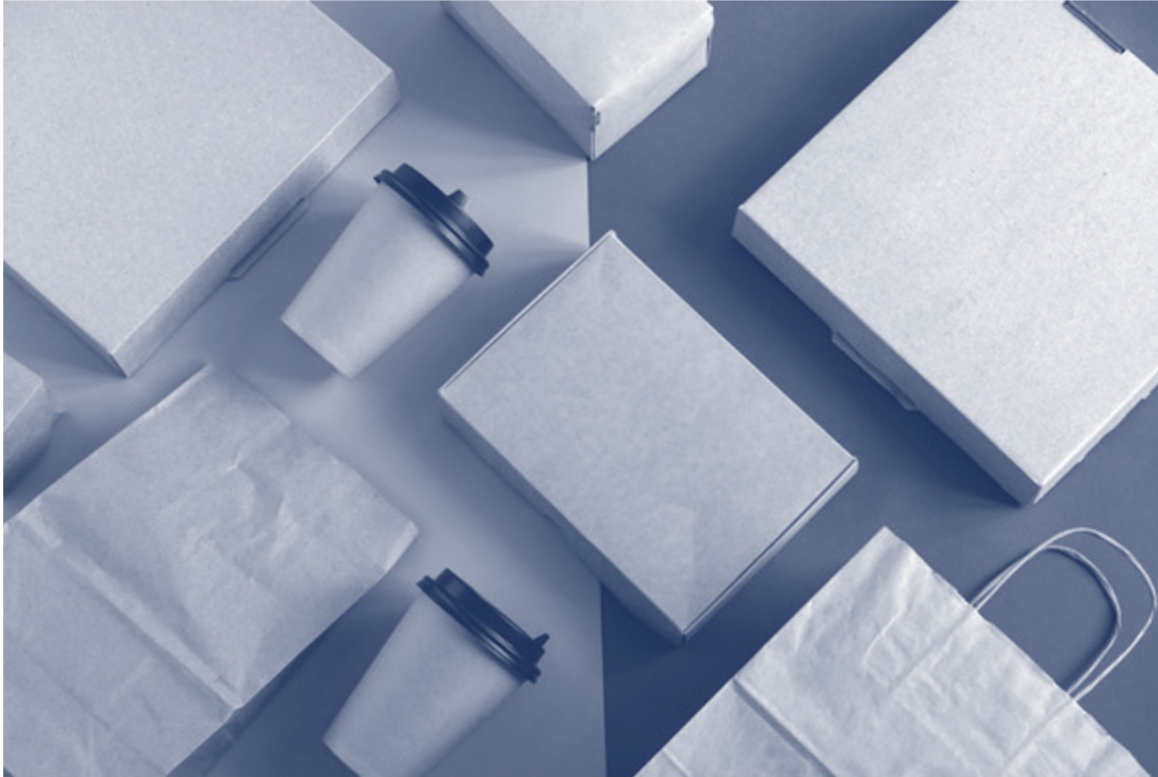
Next steps

- Global weekly Meetings - every Tuesday
 - These meetings are the only time all of Whitewater comes together.
 - 1st Tuesday of each month - Topic: Review of progress in our Strategic Journey - Led by Seamus
 - 2nd Tuesday of each month - Topic: Business Development/New Client Engagements - Led by Joe Zhou & Niel Malan
 - 3rd Tuesday of each month - Topic: Thought Leadership - Led by Ian Riley
 - 4th Tuesday of each month - Topic: Client and Project Delivery Cycle - Led by Joe Zhou & Niel Malan
- Note that we will using some of these meetings to also include some Training Sessions (save the date!):
 - On Tuesday 7 November - Social Media and Online Presence
 - On Tuesday 14 November - Fingerprint for Success (A tool to support you in building your business and our ways of working).
- Reminder Homework preparation

Homework (to be shared in Connect Session on 19/10)

1. Summarise your past transformation focus - geography, industry, & type of transformation (1 minute)
2. Tell a 'War story' of your transformation project (2 minutes)
 - Situation/need
 - What did you deliver
 - Success/failure
 - Lessons learned
3. Identify your target industry/sector and preferred potential clients considering both your and Whitewater's capacity. (1 minute)
4. What would you bring to the WhitewaterTX community ?

Key takeaways



1. Check-out process:

- Each person should briefly share a key takeaway or reflection.
- Once done, the current speaker will nominate the next person to share.

2. Key takeaway sharing:

Ensure reflections are brief and to the point to respect everyone's time.



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