

Connecting to Clients



**Articulate better, build relationships with clients and gain
their trust**

Approach paper- 17th April 2017, Ver 1.0

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Your need as we understand:

Background

Genpact is a global business process management and services and IT corporation. It uses digital technology and analytics to create experiences which demonstrate that advanced business processes and operations can generate material impact. They help clients control cost and capital intensity, strengthen market engagement, support organizational transformation, and manage risk and compliance.

Situation

The target audience for this learning initiative consists of a leadership team of 40 – 45 people. These include Managers, Senior Managers and Associate Vice Presidents who are graduates or postgraduates with 8 to 15 years of experience. The first phase of the program will target 20 leaders who are expected to gain confidence, develop skills of story telling and articulation and build sustainable relationships with clients.

Opportunity

There is an opportunity to build and strengthen client relationships by:

- Creating more customer centric leadership
- Building trust and ensuring that client perceive us to be open and transparent
- By being proactive and innovative so that we create long-term value for the clients
- Increase the impact in communication and demonstrate confidence / executive presence or communicate using “Story Telling”.

Implication

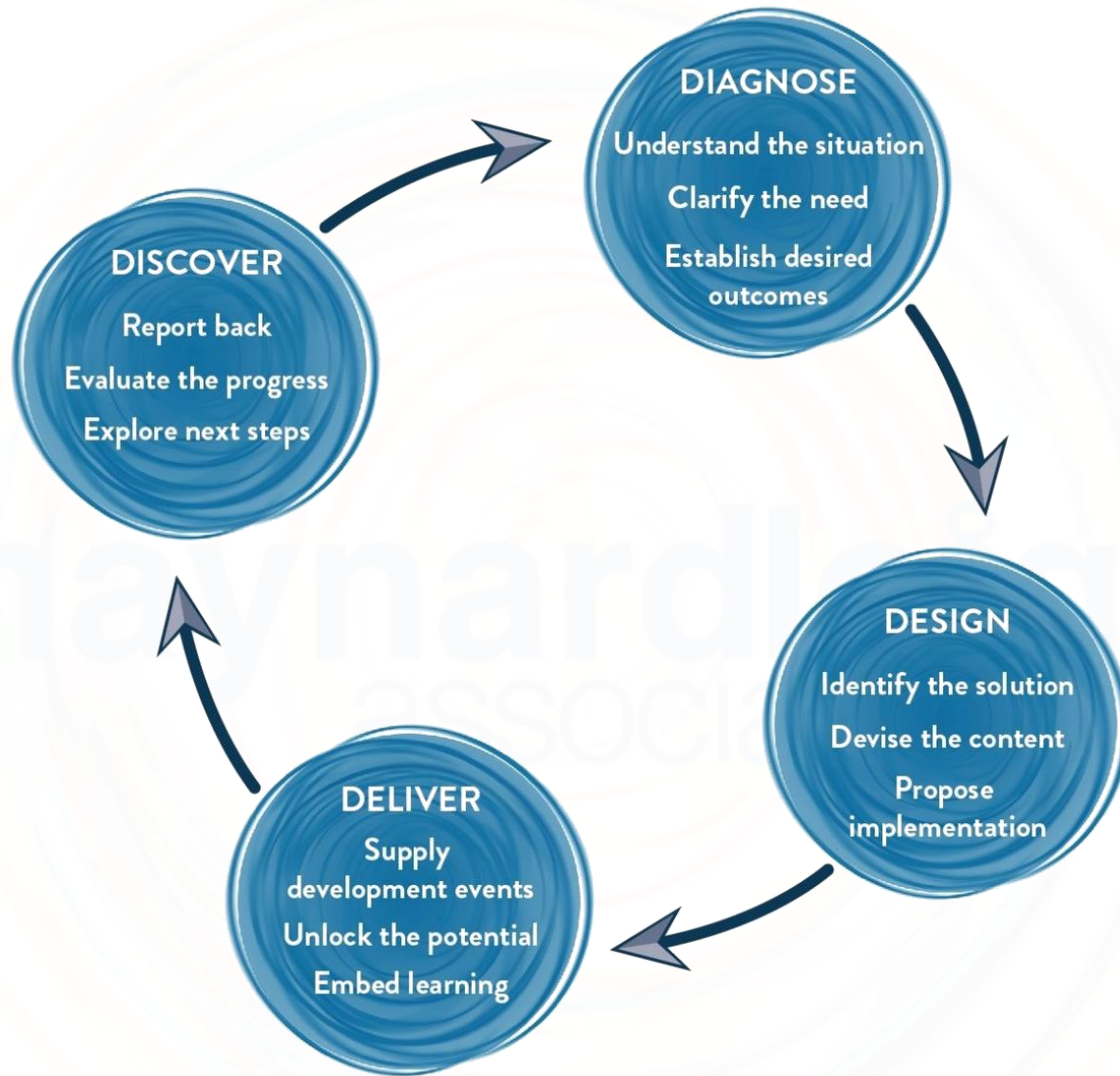
If the above mentioned opportunity is not monetized, then:

- We may lose penetration into the existing accounts
- We may lose the ground for negotiating future contracts / opportunities
- We may also lose more accounts in the long run
- The chances of tapping into more opportunities may reduce
- We may need to sell hard
- The clients may perceive us to be under confident
- Clients may perceive us to be complacent and not trustworthy.

Need

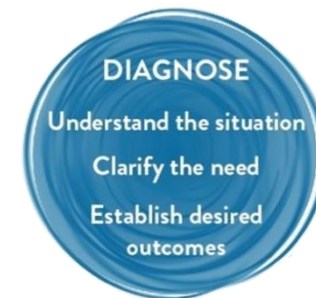
Genpact would like us to design a learning journey for leaders so that the target participants can be exposed to skills like – executive presence, story telling, building, deepening and expanding client relationships. The measure of success for this initiative would be “Improving Client Relationships”.

Our Approach



Methodology

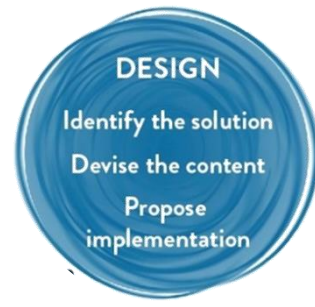
Diagnosis



We have had a conversation with Purva and Kishore which has helped us finalize the initial mandate. We propose to spend a day meeting the HR, target participants, their managers and reportees to collect information about-

- 1. How are their current interactions with the clients?**
- 2. Different communication scenario where they have been required to build a story, articulate better**
- 3. Common Communication and trust issues**
- 4. Get to know their work flow**
- 5. Rating them on 1-10 (1- lowest 10- highest) on their parameters to better client relationships**
- 6. Knowing their desired state of relationships with their clients**

Design



Post the diagnosis, we get into the design phase of the learning intervention.
Here are 3 things we will do:

Diagnosis report: A report is generated which would reflect the outputs from Diagnosis (The identity of the participants would be confidential).

Design Customization: The consultant will design the final objectives and customize the content of the learning intervention. Modules of the workshops are designed, activities are mapped to the examples, new handouts are drafted based on the content.

Design Presentation: The final objectives and design of the learning intervention are presented to the learning partners/stakeholders via skype/call/in person

Sample Learning Objectives: Connecting with Clients. We will customize the design according to the scenarios collected in the diagnosis phase. Post the workshop, participants will:



Think

- I am making an impact at every moment- consciously and unconsciously hence I need to be careful on how I am carrying myself in interactions
- To sustain my relationship with clients, I need to be able to continuously provide them delightful experiences.
- Building personal connect with the clients is the key to long term relationship
- I need to be proactive in communicating with the customers
- We need to overcome the complacency that have formed in clients mind
- Getting clients to perceive us to be customer centric



Feel:

- **Confident** to be able to communicate with depth.
- **Wanting to connect** at a deeper level with the clients
- **Present & Alive** to my conversation with the customers



Be more able to:

- Be a opportunity Seeker- What can I offer to my customer to value-add
- Sustain productive working relationships with my customers
- Use personal stories to build connect and creative productive working client relationships
- Build relationships/network with Clients
- Increase ability to articulate adequately and create impact through increased personal presence/charisma

Design – Personal Impact Workshop Outline – Day 1 with 10 participants per batch per consultant



Session	Session details	Methodology	Objective targeted in this session
Introduction	<ul style="list-style-type: none"> Welcome and context setting Maynardleigh & participant Introductions Permissive Encouragement – Play & Express yourself 	Theatrical warm ups Experiential Context setting	Get in touch with one's ability to be authentic and expressive
Issues	<ul style="list-style-type: none"> Discussion to explore participants issues: <ul style="list-style-type: none"> ➤ What brought you here? Why have you come here? What issues do you want to look at? ➤ What do you want out of the course? 	Flipchart exercise	To understand issues from the participants
The first impression	<ul style="list-style-type: none"> What creates the first impression Receiving feedback on my impact Understanding the nature of impact 	Participant led mutual feedback exercise. Facilitator led impact exercises.	Make a good first impression Articulate adequately in all channels (virtual and in person)
Style Audit	<ul style="list-style-type: none"> Impact comes from Care, Flair and Aware ✓ Care = Demonstrate that you value yourself ✓ Flair = Express your self, be creative, voice quality, personal style ✓ Aware= Make sure your clothes are appropriate 	Discussion leading to Role Plays	Appreciating differences in style and how appearance impacts on our clients.
Prepared Presentations	<ul style="list-style-type: none"> "Sell yourself in 60 seconds" Utilize whatever you have learnt till now Video graphed feedback 	Video Playback in the room	Self awareness Vulnerability Validation of feedback
A = AIM	<ul style="list-style-type: none"> What is your AIM/ Purpose? (To realize the importance of being clear about our AIM. The clearer and more specific we are, the more likely we are to achieve it.) 	Leader & participants offer Insight	Communicate to involve others. Be more confident and assured.

Design – Personal Impact Workshop Outline – Day 1 Continued...



Session	Session details	Methodology	Objective targeted in this session
B = Be Yourself	<p>It's not only about WHAT we communicate. It's also about HOW we communicate.</p> <p>Preparing all your resources to create a Personal Impact –</p> <ul style="list-style-type: none">• MIND – Centering Technique and building awareness• BODY – Preparatory exercises for keeping the energy flowing• BREATH – Taking care of anxiety• VOICE – Helps in pitching with impact and• EMOTIONS – Supports in getting along with variety of people	<p>Rehearsals</p> <p>Coaching</p> <p>Experiential activity</p>	<p>Knowing what to work on in my interactions and how to do it</p> <p>More aware & assured about ourselves.</p>
Closing	<p>Participants finalize what they will START doing, STOP doing & CONTINUE doing.</p>	<p>Action planning</p> <p>Completion</p>	

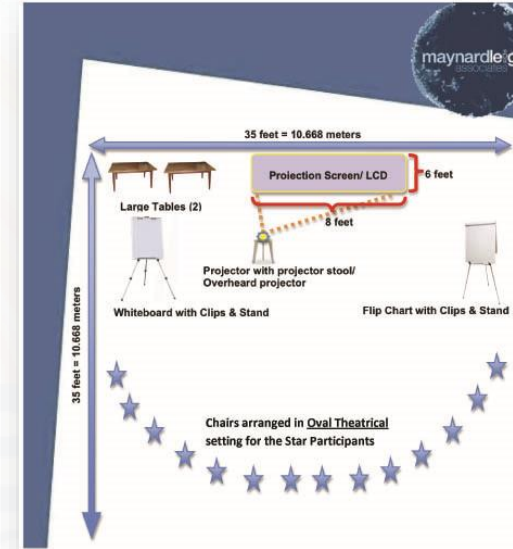
Design – Personal Impact Workshop Outline – Day 2



Session	Session details	Methodology	Objective targeted in this session
Hello! & Recap	<ul style="list-style-type: none"> Recap of Day 1 & Participant peer coaching partnerships created for the rest of the day. 		
Understanding the client	<p>Discussion in small groups; Understanding The Client: What do you get? How do you get it? How useful is it? How do you interpret it? Moving from hard data to soft data that allows you to build a relationship.</p>	Facilitator led	First step to build relationships/network with Clients
Getting to know people	<p>Character profile Choose somebody with whom you would like an improved relationship. It helps if you understand the person better. Build a detailed profile of the person:</p>	Facilitator led	Spending personal time with my customers to build connect with them
Probing	<p>The quality of your questions will determine the quality of your relationships. Exploring the different types of questions. Create a scene using each type of question.</p>	Role play - done in pairs	Deep understanding of the client need
Listening	<p>What are you listening for: to respond, OR to help & understand? Bridges and Barriers to listening. A talks about “what I find difficult about client relationships using examples of past experiences?” and B listens looking for anything that will allow the relationship to move on. Then talks at the end.</p>	Role play- done in pairs	Being present and listening to the client
Chemistry	<ul style="list-style-type: none"> Attention - Choosing where to focus. Focusing attention on the other person or people. Interdependence - Working creatively in partnership and collaboration with others.. Rapport - Mirroring and developing sensitivity to others, Developing empathy, Understanding the other person. <p>Understanding different global cultural nuances</p>	Facilitator led psychodrama exercises	<p>Being able to Use personal stories to build connect and creative productive working client relationships Building rapport – able to listen & connect with clients</p>
Wrap up	Filling of stop start continue sheet		



A one to one meeting with HR stakeholders to take feedback on the intervention and how it was received and next action steps.



We love alternative ways of setting up a workshop! Creating an atmosphere where the participants feels absolutely comfortable and yet challenged. In this workshop, the use of theatre, team games and experiential methodologies are essential ingredients, hence we'd require ample place to move around and make noise.

Please book a space with ample natural light (Yes, we want sunlight streaming in) and no fixed furniture for the leaders to work with one MaynardLeigh consultant.

Things Required at the Venue



For the workshop, we will need the below mentioned:

- **LCD projector** and projection screen **8×10 feet**
- **UPS Power Back-up** for Laptop, LCD projector & Laptop speakers
- **External speakers** (for laptop connectivity). The external speakers should be loud enough to play music for the team.



- **White board** & White board markers (2 blue, 2 black, 2 green)
- **Flip chart** and Flip chart stand with suitable clips
- **Colour pens** (Normal sketch pens - about 30)
- **Notepads and pens** (for participants)
- **Blu Tac** (This substance is used to stick things, posters or paper on the wall)
- 20 A4 Size normal and **drawing sheets**



- 2 tables for the consultant(one will be used for the projector and the other for keeping the handouts)

Next Steps



- **Financial processes:** Let us close on the commercials and contracts to start the preparation process.
- **Diagnose** – While the initial conversations helped us finalize the mandate, we'd like to have a few more conversations to dig out more examples from the team.
- **Book:** Please book the diagnosis and design dates at the earliest so that we have the consultants available for you.

Your Investment for the intervention



<u>Delivery (for each batch of 18 participants)</u>		
<u>Activity</u>	<u>Investment</u>	
Professional Fee for delivery – Connecting with Clients Workshop (Consultant 1)	INR 55,000 Per Day per consultant X 2 Days X 1 Consultant	INR 1,10,000/-
Professional Fee for delivery – Connecting with Clients Workshop (Consultant 2)	INR 0	Complimentary (as an exception)
Learning Material, Folders, books	INR 580 per participant X 18 participants	INR 10,440/-
Total Investment covering 18 Participants		INR 1,20,440/-
Total investment per participant		INR 6691/-

Travel and Stay arrangements for both the consultants to be made by Genpact.

Let's work in partnership to create impact & unlock potential



For further information please connect with:

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