2024: Why are we updating the guide for Winning Business?

WB Currently…

- Works! *for the most part*
- and has strong support
- Needs adjustment for the "new RRA" with a larger set of offerings and a concerted pivot to leadership advisory
- Has pockets of abuse and runs the risk of materially compromising RRA's commercial acumen and integrity
- Has non-uniform interpretation of "value", "relationship", "expertise", trusted advisor", "pivotal", "additive", "minimal" etc.

This evolution…

Be Simple

- Move from 50+ scenarios to 10
- Thinking more about the principles

Be Modern

- Provide for multiple service offerings
- Teams of 3+
- Golden Trio – Bringing more to the firm
- "Re-energize" commercial drive

Govern Better

- Directly Address "Bad Behaviors"
- Use technology to assist and to identify suspicious cases

Enable Growth

- Fix abuse
- Reaffirm principles

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Winning Business (WB) User’s Guide 3.0

DECEMBER 2023 / JANAURY 2024

Key objectives and advantages of Winning Business

These objectives underline the core of our approach to Winning Business, reinforcing the behaviors we want to encourage and setting the foundation for success as the Preeminent leadership advisory firm.

Assemble the Best Client Team

The approach should enable us to bring the best team forward for the client.

IT SHOULD:

Encouraging teaming to address the client's needs
Enabling and activating the right resources to do that
Broaden client relationships within the firm
Develop and provide opportunities for others

SHOULD NOT:
Encourage jockeying for higher visibility than colleagues
Grabbing credit for every interaction

Recognize Great Work

We want to recognize and encourage great work where we see it – supporting our performance driven culture.

Encourage consultants to take initiative and to be proactive
Reward contributions built on great work and strong collaboration

Awarding for effort or passive contributions
Rewarding for minimum/basic cooperative behaviors

Be Fair and Balanced

We need to recognize that not all contributions are equal – and that it is important to recognize differentiating levels of contributions

Reinforcing our commercial drive

Maintaining consistency and credibility of approach.

Limiting the dilution

Being generous to others feel good

Maximize team credits

Guiding principles of Winning Business

Winning Business is a measure of a consultant's direct contribution to winning a project. It should be awarded on every project to represent that contribution.

There are a varying combination of situations and contributions that can impact winning business allocations and the following principles should be considered in allocating Winning Business across the team.

We award WB for **direct** contributions to the win.

The impact should be meaningful and directly attributable to the win.

Up to 200% WB can be awarded across the team.

No one person can receive >100%

Contributions should be meaningful and balanced across the team

Consultants can contribute in multiple ways towards a win, both in helping to create and secure the win

Ask the following questions to determine WB:

- Who had a direct contribution to the win?
- What are the contributions to the win?
- What are the relative contributions within the team?

Steps to think about Winning Business Allocations

After the win ask:

Who had a **direct** contribution to the win?

What are the contribution of each consultants?

- refer to the WB Guideline Grid for this

What were the relative Contributions within team?

Use judgement and consider the collective impact:

Use judgement for the specific context

If you can't find a contribution that describes your contribution exactly, ask yourself and the team 'why do we believe the client awarded us this work and what is the relative contributions to that win?'

Then apply your good judgment to fine the one that comes closes and adjust as needed

Think of the collective impact and contributions

It is possible, and perhaps common, for an individual consultant to be associated with multiple contributions e.g. s/he may qualify both for market reputation and adding value in a competitive pitch

For more complex scenarios:

Add collective contributions and scale

For larger teams & more complicated scenarios: *(refer to the WB Guideline Grid)*

- Determine the WB contributions and % mentioned in the grid that relate to all the contributions selected for each consultant
- Add the WB% for each individual consultant on the team
- Add the WB% across all consultants on the team. If the total is >200%, scale down everyone's WB such that the total is 200%
- If any individual consultant has WB of more than 100%, their contribution holds at 100%.
- The rest is surplus (a.k.a house) because it *would have been awarded* to a consultant with >100%

Finalize and get help:

- Confirm the allocation across the team
- Record a clear description of your WB allocation rationale in the system upon opening the assignment
- In case any disputes that can't be resolved within the team itself, refer to the WB Dispute Resolution process

What is a “Direct” impact to the win?

Any contribution that is awarded WB should have a direct and meaningful impact to why we were awarded the client work.

After the win ask:

Who had a **direct** contribution to the win?

What are the contribution of each consultants?

- refer to the WB Guideline Grid for this

What were the relative Contributions within team?

Clarifying points:

WB should only be awarded when there is a clear and DIRECT contribution to the specific win, i.e. there is a specific contribution to that specific opportunity that can attributed to us winning the project.

Consultants can have multiple contributions which can impact “creating the opportunity” and “securing the opportunity.” Some contributions may have impact on both sides.

Indirect contributions, prior efforts, relationships that have no notable impact on the win.

- Relationships/Known to client
- “RM” not involved in pitch
- Former prior candidate part of the search team
- Executing the work, but not being a factor in win/pitch
- Inclusion in the pitch as execution team leverage
- Passing leads

Contributions should be scaled according to the impact and to scale on # of team member and total contributions

25%	50%	75%	100%
Some direct contribution. Contribution is helpful and adds incremental value but is not decisive in the win.	Notable contribution. Adds value, but not be enough to independently contribute in either creating or securing the win	Significant contribution. Used to show relativity if another team member at 100% has a greater impact. Contribution might only be on the creating or securing side.	Critical contribution. Indispensable to the win and largest impact, typically across both creating and securing win.

Minimizing Bad Behaviors

There have been some very specific unintended consequences that we look to eliminate as we move forward in the system. These behaviors lead to distrust in the system, create variations in outcomes, inflate individual results and dilute WB.

	Trading WB for execution	**WB tax for prior work**	**Over allocating, using surplus**	**WB partnering**
	Awarding WB to execute vs recognizing good execution	**Awarding WB for prior – non-related work**	**Giving 200% for generosity**	**Creating partnerships to share 200% WB**
	WB should only be awarded when the individual executing had a meaningful impact to winning the project. Trading occurs when someone asks for WB credit, without an active or meaningful contribution in developing the opportunity.	WB should only be awarded when the individual with the client relationships was active in securing the opportunity. Tax occurs when the impact of an individual's prior work is inflated relative to others direct contribution to the win.	WB awards should be balanced and fair, reflecting the weight on one's comparative contribution. Over-allocating occurs when contributions are inflated or rounded up to simplify the discussion or to make the team members feel good.	WB should only be awarded when individuals have a direct contribution to the win with a client and project. It should not carry-over across all work with the client or be limited to two or three people.
Examples:	*Consultant A and B won work with the client but needs an additional resource to execute.* *C is asked to execute, and the client agrees to have C execute after a brief meeting. C asks for equal WB with A and B.*	*Consultant A and B won work with the client, with B executing the last project well. We are the clients preferred provider on multiple projects with A's ongoing dialogue, work and expertise.* *The client asked A to do another search. B asks for 100% based on recent execution.*	*Consultant A and B pitched and won work with the client.* *Consultant A had a history with the client and industry expertise. B brought the capability expertise. A & B had a limited discussion with the client to confirm the firm's ability to deliver.*	*Consultant A and B agree to pitch and develop all clients together.* *Consultant A and B agree to share 100% allocation regardless of circumstance or situation. A is approached about a project specific to A's expertise; B is copied.*
Incorrect	A, B and C with 50-66%	A and B with 100%	A = 100%, B = 100%	A = 100%, B = 100%
Correct	C should receive 0-25% depending on discussion and impact in gaining the client's trust. Zero if meeting was an introduction to the team, 25% if exchange had a direct impact on solidifying win.	A = 100% and B = <25-50% as A is still the primary reason for the work.	B should be limited to 50%-100% with A at 100%.	B should be limited to 50 – 75% with A's expertise more relevant and will have more ownership and visibility in effort.

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Contribution Index

This index is meant to provide guidance and common scaling across different contributions

WB Contribution Guideline Grid – *Common Situations*

Contribution | WB %		A	B	C	D	E
		NIL	25%	50%	75%	100%
1	Random lead/ Referral	**Call-forward:** • PNB from an unknown contact is simply forwarded to colleagues with relevant expertise.	**Orchestration:** • In response to a PNB from an unknown contact, the consultant pitches RRA and constructs the right team to take it forward but does not attend follow-on pitch discussions.			**Full pitch:** • In response to a PNB from an unknown contact, the consultant pitches RRA and constructs the right team; their expertise is pivotal to the win.
2	Existing client or relationships	**Pass on:** • An existing client reaches out to someone not previously engaged with work at this client and they pass the lead to the relevant colleagues. • A relationship management team is passively informed of engagement with another RRA team.		**In-take:** • Introducing past client or relationship through a brief intake to colleagues, a team you assembled, who engage in a competitive pitch.	**Proactive:** • Actively introducing client contacts to colleagues in markets where this client wasn't already being served and creating new opportunities (applies to initial opportunity only).	**Pick-up:** • Project is not competitive due to extensive and recent work managed by consultant or because of a preferred relationship with the relevant client executives. • Consultant obtains introductions to additional executives at a client they are working and create new opportunities for colleagues.
3	Prior work related	**Disconnected:** • Securing new work at a client where the client executives have changed, or the previous work is dated (>2yrs ago) OR was in a different space or market to the current win.		**Relevant:** • Securing new work on the back of previous work such that the previous work is recent (<2yrs ago AND was in the same space or market as the current win.	**Foundational:** • Securing new work on the back of previous work where the excellence of the work was cited as a reason for the new work. The prior and new work could be in Search or Consulting.	**Follow-on:** • Creating follow-on work as a direct result of previous good work AND which requires their active engagement in the project delivery (whether or not getting EXE credit)..
4	Acquiring a new client					**Traditional BD:** • Through proactive BD, market activity or execution, consultant develops a new relationship that leads to a pitch and win.

Each bullet point is an illustration of a possible contribution

WB Contribution Guideline Grid – *Common Situations*

Contribution | WB %		A	B	C	D	E
		NIL	25%	50%	75%	100%
5	**Market reputation related**		**Creating awareness of RRA:** • A client approaches RRA because of our good reputation on a specific assignment/ project or at another client and decided to include RRA in a competitive process.	**Proxy:** • Not attending a pitch but other colleagues demonstrated my specific expertise and execution involvement in being able to win the work based on a prior agreement with the pitch team.* **Consultant remains actively involved in managing project going forward and has responsibility for the work product even if s/he does not have EXEC credit.*		**Reputational Leadership:** • Client referral of consultant based on market reputation which gets RRA invited to an opportunity for which RRA was otherwise not in consideration. • Being asked for directly by name by a client because of market reputation (could be basis of referral/ white paper/ podcast/ LinkedIn posts, etc.).* **Consultant remains actively involved in managing project going forward and has responsibility for the work product even if s/he does not have EXEC credit.*
6	**Helping with a pitch, providing expertise**	**Participant:** • Attending a kick-off call to meet the client and finalize spec/ scope. • Attending a pitch for apprenticeship & exposure. • Agreeing to execute a project with relevant expertise when your expertise wasn't discussed with the client as the reason to winning the assignment. • Selling Assessment when the client was not specifically interested in our methodology but just trusted that we had a valid approach.	**Useful:** • Developing engagement scope (e.g .SREA or assessment only)/ search strategy to a reasonably fair and clear need directly contributing to win. • Attending a pitch to demonstrate the broader set of RRA's services. • Pitching to an existing client in a non-competitive situation where expertise was confirmation that RRA could deliver this. We could have lost if the pitch failed.	**Helpful:** • Developing & discussing a complex search strategy and/or calibration profiles, e.g. multiple archetypes, global talent pool. • Developing & discussing a complex engagement strategy (for Consulting work) which requires a customized approach (and not just e.g. SREA or Leadership Span) to addressing the clients needs but is not so complex that it almost creates new IP.	**Meaningful:** • Demonstrating expertise including credentials that truly set us apart; client feels they have a very strong partner in RRA. This could be in either Search or in Consulting. In Consulting this could be, e.g., developing a bespoke leadership framework, a succession planning program, etc.	**Mastery:** • Winning with an existing client in a competitive situation where expertise was critical and aptly demonstrated that RRA could deliver this. RRA won hands down. • Demonstrating the expertise to a client which is the core reason for being awarded or able to deliver the work. This could be sharing stories of highly relatable work in either Search or Consulting that completely resonate with the client and their need.

Each bullet point is an illustration of a possible contribution

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WB Contribution Guideline Grid – *Common Situations*

Contribution | WB %		A NIL	B 25%	C 50%	D 75%	E 100%
7	**MSA situation**	**Past MSA:** • Negotiating an MSA in the past (>2 yrs ago).	**Market expansion:** • Negotiating an approved MSA in the last 2 years that creates opportunities in markets not already being served by RRA (only for the first project in such a market). The consultant is not directly involved in securing this project in the new market.			
8	**Open Close**	Anticipated O/C – same WB split as in the original project.. Unanticipated O/C – WB in proportion of execution involvement towards this additional hire.				
9	**Project Extensions & SREA**	WB credit principles as below e.g. • If no further explanation or "selling" is needed, then the original WB split continues • If additional colleagues get involved because the scope of the extension has changed, then use this grid to determine new and appropriate WB splits				
Relationships are being managed, big and small, on a daily basis. Whenever there is direct attribution of it to work won, please use this WB guide to determine the appropriate WB allocation - "#2 – Existing client or relationships" will hopefully address most of such direct attribution cases but please look at the other possible WB contributions (#3-#9) as well. There are some formal relationships that are being managed consistently to sustain engagement and to embed the firm more systematically. This effort is focused and deliberate and requires walking the corridors of the client, meeting several relevant executives, communicating to stay top of mind, holding regular relationship review calls (and being able to genuinely help), renewing MSAs, etc. This is expected to create outreaches from several client executives to several RRA consultants. In such cases, use #10 below to determine WB credit specific to the RM contribution to work won. The WB credit below is for the Relationship Management team and they decide how they share it amongst the team members basis relative effort and impact. The team that claims direct contribution to work won must acknowledge that the consultant(s) claiming such credit are indeed nourishing RRA's reputation and position with this client. In addition to the RM WB listed Consultant may also receive WB credit for their individual contributions for a particular pitch related to their relevant expertise. Fleeting or dated social contacts or one-off check-ins are not legitimate reasons. Being RM in title is not reason enough for recognition. Receiving WB for Relationship Management should be related to active coordination and contributions to expanding the reach and impact of the firm.						
10	Relationship Management contribution to winning new work	• Little effort or impact from "relationship management" and in most cases, the client knows which RRA consultant is good for what and just reaches out to them directly. The opportunity is not related to the specific client strategy or a derivative of that.	• Some notable effort goes into "relationship management" AND the client typically defaults and relies on this team to advise them of the best RRA consultant(s) to undertake an assignment.	• The client has several executives that need to be regularly met with globally by the RRA team. Also, the client believes this RM team is ultimately responsible for all work and escalations – "single neck to choke " and the client expects them to solve any issues.	n/a	n/a

Each bullet point is an illustration of a possible contribution

The Basics – Existing clients, relationships and prior-work

(Scenarios 1 of 3)

#	Win Contributions	Scenario	Allocation
1	Existing client & helping with a pitch 3 consultants	Client that has done prior work with A asks us to pitch for a role in B's space. A has a history with Client and expertise of industry, B is strong in the capability/industry. C has done assessments in the space. We win based on A's history and expertise, B's extensive capability and C's insights. The expertise of B and C is equally balanced in the win. B or team will execute.	A=100, Foundational prior work, mastery expertise B = 50, Expertise C = 50, Expertise
2	Existing client & prior work related 2 consultants	Client asks us to take on additional work based on multiple prior projects. A and B have led most of the work to date, and there is no pitch needed. A has a deeper relationship with the client. B is gaining involvement over time. A is still the primary advisor for the client. B or team will execute.	A=100, Follow-on prior work, relevant expertise, A > B B = 50, Relevant prior work, relevant expertise
3	Existing client & prior work related 2 consultants	Client asks us to take on additional work based on multiple prior projects. A has experience with the client and B has led most of the work recently. A and B are interchangeable with the client. B or team will execute.	A=100, Relevant prior work, expertise B = 100, Relevant prior work & expertise,
4	Existing relationship New Role 2 consultants	A has a history with the client and is invited to pitch in a new area of expertise. B is invited for the capability expertise. Over a series of discussions with both A and B, we win the work based on the client's strong prior work experience with A, and B's depth of expertise and experience in the relevant capability separate from A. B or team will execute.	A=100, Pick-up, expertise B = 100, Expertise

The Basics – Existing clients, relationships and prior-work

(Scenarios 2 of 3)

#	Win Contributions	Scenario	Allocation
6	Existing relationship, + expertise 3 consultants	A receives a call from a prior client based on their history. The client is looking for work in an area that is not relevant to A who passes the opportunity onto consultants B and C. B and C pitch with A joining to provide support and knowledge of the client. It was the mastery expertise related to the opportunity that secured the win. B, C or team will execute.	A = 50%, Proactive, useful expertise B = 75%, Mastery expertise C = 75%, Mastery expertise
7	Existing client New Role 2 consultants	A has a history with the client and is invited to pitch in a new area of expertise. B is invited for the capability expertise. Over a series of discussions, we win the work, on the back of the specific expertise of B. Although A had a strong history and trust with the client, it was the expertise of B that was determinant towards the win. B or team will execute the project.	A=100, Foundational prior work, expertise B = 100, Mastery expertise
8	Existing client Helping with Pitch	A has a history with the client and is invited to pitch in a new area of expertise. B is invited for the capability expertise but cannot attend. B completes a customized engagement strategy, which resonates strongly with the client. We win based on the strong history of A and the proposal of B. B or team will execute the project.	A=100, Foundational prior work, expertise B = 50, Helpful expertise
9	Prior work 1 consultant	A former candidate reaches out to consultant A based on prior work and relationship. A suggests B to lead the project and the client agrees based on the recommendation. There is no pitch needed. B will execute. *B could receive up to 50% if A used B's specific expertise and execution as a condition of the project – but B should be included in discussion with the client if possible, or at a minimum consulted about the potential opportunity.*	A = 100%, Pick-up B = 0%

The Basics – New clients

(Scenarios 3 of 3)

#	Win contributions	Scenario	Allocation
10	Acquiring new client + expertise 4 consultants	A and B have been developing a client for several years. A receives a call about a new project. After identifying the specific project requirements, C and D are invited to the pitch to add additional expertise. All four attend the pitch. C's expertise for the role, while D showed broader services of the team. The expertise of all four were equally relevant in securing the opportunity. B or team will execute.	A = 75%, Acquiring new client, expertise B = 75%, Acquiring new client, expertise C = 25%, Useful expertise D = 25%, Useful expertise
11	Acquiring new client +market reputation + expertise 4 consultants	A and B have been working with a client for several years. A receives a call about a competitive opportunity. A and B work on putting together the right team and invite C and D to pitch for the additional expertise. All four attend the pitch. C's expertise was critical for the role and was most impactful while D also was impressive and known in market. A and B provided value from the client and industry perspective. C or team will execute.	A = 40%, Acquiring new client, expertise B = 40%, Acquiring new client, expertise C = 75%, Mastery expertise D = 45%, Useful expertise, reputation
12	Reputation + expertise 2 consultants	A receives a call from a client based on market reputation to start a conversation. A invites B to join, knowing the overlap in relevant expertise. B ends up having the determinant mastery expertise needed to secure the win with A's strong market reputation holding influence. B's expertise was the critical component in securing the opportunity. B or team will execute.	A = 100%, Reputation, useful expertise B = 100%, Mastery expertise
13	Reputation + expertise 2 consultants	A receives a call from a client based on market reputation to start a conversation. A invites B to join, to show greater depth of expertise and as a development opportunity. A wins based on a depth of expertise further bolstering their strong market reputation, with B showing mastery expertise and perspective. A, B or team will execute.	A = 100%, Reputation, useful expertise B = 50%, mastery expertise

Enhanced Governance and Oversight

The following tools and escalation points are proposed to ensure consistency, resolve disputes and provide continuous oversight

WB Oversight Within SLT

- The Hub Portfolio and Industry and Capability Leaders will work with the people team to regularly update the guide provide oversite on activity, escalation trends and common issues raised

WB Channel and Escalation log

- Credit dispute escalations to the Hub Leader and beyond will be logged and reviewed for trends
- A WB *channel and microsite* will be created to make WB content more readily available to all and to regularly post any updates and relevant trends proposed from feedback and escalations.

WB Teaming Reporting

- Leverage analytics to help identify patterns and suspicious cases for follow-up
- Focused on inconstant application and potential behaviors identified and perform a deep dive on:
  - Fully 200% WB consumed on 2 consultant teams
  - WB pattern identification enabled via AI technology e.g. two consultants constantly pair for 100% each
- Other analytics can be added over time as we gather other common areas of abuse

WB Tool

- Creation of a WB Tool or calculator which will allow teams to input the contributions and determine a suggested allocation based on the size of the team and multiple contributions

Finalizing Allocations and Dispute Resolution

Take the following steps to determine allocations across the team for each win

1) Finalize Allocations

- Discuss contributions when putting together team and following any win
- Using the Guidelines and addressing the key questions
- Confirm the allocation across the team
- Record a clear description of your WB allocation rationale in the system upon opening the assignment in the "How did we win" section

2) Clarify any questions

- Check distribution against the guidelines
- Engage the Hub leader for support and clarification if needed

3) Escalate if needed

- Any consultant on a team can escalate a WB dispute to the relevant Hub Leader(s)
- The Hub leader will in turn consult with other relevant leaders (Practice/ Sector/ Capability/ another Hub leader/ Relationship Managers) and take a final call
- Further escalations may be sent to the Hub Portfolio and Global Industry and Capability Leaders which will review the dispute and resolve any question on the allocation