

Winning Business (WB) User's Guide 3.0

DECEMBER 2023 / JANUARY 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

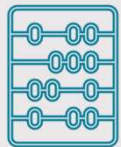
Winning Business is a measure of a consultant's direct contribution to winning a project. It should be awarded on every project to represent that contribution.

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:

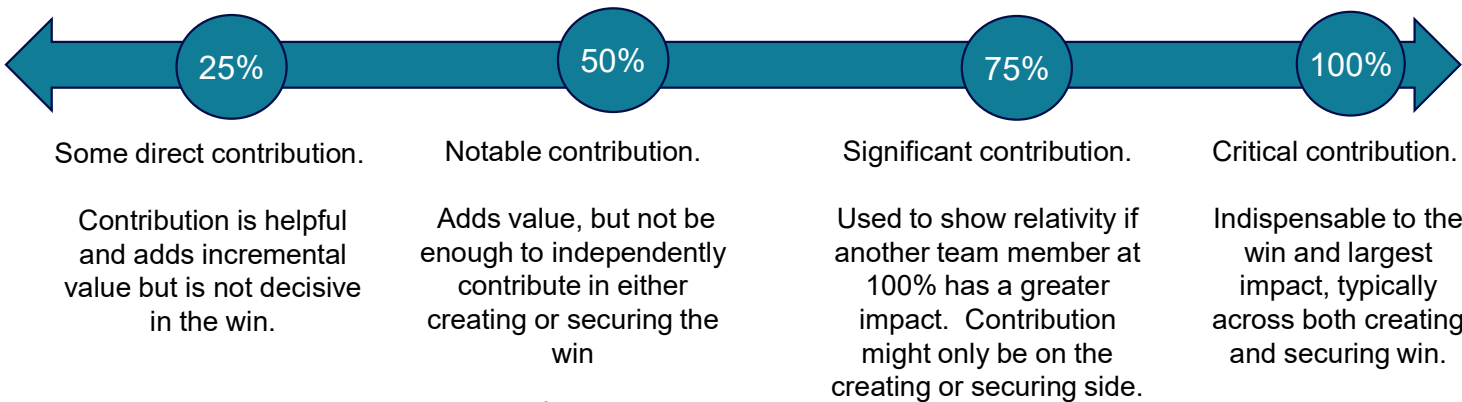
WB should only be awarded when there is a clear and DIRECT contribution to the specific win, i.e. there is a specific contribution to that specific opportunity that can attributed to us winning the project.

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



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.		WB should only be awarded when the individual with the client relationships was active in securing the opportunity.	WB awards should be balanced and fair, reflecting the weight on one’s comparative contribution.	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.
Trading occurs when someone asks for WB credit, without an active or meaningful contribution in developing the opportunity.		Tax occurs when the impact of an individual’s prior work is inflated relative to others direct contribution to the win.	Over-allocating occurs when contributions are inflated or rounded up to simplify the discussion or to make the team members feel good.	
Examples:				
<i>Consultant A and B won work with the client but needs an additional resource to execute.</i>		<i>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.</i>	<i>Consultant A and B pitched and won work with the client.</i>	<i>Consultant A and B agree to pitch and develop all clients together.</i>
<i>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.</i>		<i>The client asked A to do another search. B asks for 100% based on recent execution.</i>	<i>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.</i>	<i>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.</i>
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.