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SO HOW AM I DOING? THE IMPORTANCE OF PROFESSIONAL SERVICES

EVALUATION

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Abstract

All facilitators can improve their business by constantly evaluating the work they've won...and lost. A Professional Service Evaluation (PSE) process helps you answer these questions – why did (or didn't) a client hire you? Would a client hire you again? Why?

Each facilitator needs to create a PSE that works for them. Using a combination of a process such as Disposition Review™ to understand your wins and losses and a process that measures client satisfaction, facilitators can begin to understand their own strengths and areas for improvements as well as the strengths and weaknesses of their competitors. This provides important marketing and business strategy information.

Contact Susan Nurre with questions on how to develop a PSE that works for you.



Professional Services Evaluation

What is it?

A Professional Services Evaluation (PSE) uses a formal approach to analyze sales opportunities and service delivery. This approach is composed of a Disposition Review™ and client satisfaction input as well as standard workshop evaluations.

The PSE answers these questions:

- Why did a client hire you?
- Why didn't a client hire you?
- Would a client hire you again?
- Why or why not?

It also provides information to allow you to develop and enhance your sales strategy, develop specific competitive strategies, and focus on the "most winnable" opportunities.

Why do it?

Conducting a PSE helps you identify your sales and delivery strengths and areas for improvements and can result in action plans to improve win ratios and enhance client satisfaction. A PSE also can provide information on your competitor's strengths and weaknesses that you can use in future bids.

A complete PSE is not necessary for every project but should be considered in cases where there is a large dollar volume or long-term project, a project that involves new clients, or one deemed to be strategic to your business or where you are venturing into new areas of interest.

Disposition Review™

What is it?

The Disposition Review (DR) is used to gather information on the outcome of a sales opportunity – whether you won, lost or the bid was tabled. This series of questions and analysis can help improve win ratios by providing a more accurate picture of the client's decision criteria, your competitor's advantages, and your advantages and disadvantages. You also can use the DR to help pre-qualify potential clients and assess risk factors involved in pursuing an opportunity.

Why do it?

It's easy to understand why you analyze wins – so you can continue to do what worked!

So why review losses or tabled bids?

While losses also can provide detail on your strengths, they also contain a wealth of knowledge on areas for improvement, potential alliances/partnerships you should seek, competitive strengths to mitigate, service definition/enhancements you need to make in your presentation and materials, and client decision criteria for future bids with this client.

Tabled bids, which should not be reviewed in as much detail, often provide information on how to get the bid "off the table" or how to strengthen your bid when it does resume.

How do you do it?

Set up Disposition Review

When you set up the DR, you must educate the client on the process and its benefits for them as well as for yourself. As long as you minimize the time and effort required, many clients appreciate the rigorous DR process as your tool for self-improvement. Also, some clients benefit from the thought process behind answering your questions – often this will result in the client more clearly defining their needs in future requests for proposals.



You can conduct the DR through a face-to-face interview, telephone call, survey or through a neutral external reviewer. Each vehicle provides advantages and disadvantages regarding time, cost, and feedback. Select the one, or combination, that is appropriate to the particular opportunity and client.

Generate questions

As you are developing your PSE, you will begin to build a list of generic questions to use as a starting point each time you plan a DR. You can then customize these questions for each specific project. Sample generic questions are "Was the technology I provide a deciding factor?" and "Did you feel you could clearly understand our service description?"

Gather and review client information (generally this will have been done when you were putting together your bid) and any competitive information you have. Client intelligence includes annual and financial reports, as well as any articles, newsletters, and product literature available. Also identify the client's mission, industry trends, major markets, key customers and competitors and its organizational structure.

Next, based on the generic question list and the client intelligence, identify the questions you think are appropriate. Customize each using the client or salesperson's name, service offering, timeframe, etc. For example, using the generic questions listed above, customizing them might look like this: "Was the electronic meeting software that I provide a deciding factor?" and "Did you feel you could clearly understand our Strategic Planning process?"

Survey internal sales team (even if it's just you!)

Another list of questions you'll begin to develop through the PSE process include internal review questions. These are the questions that will be key for you and/or your sales team to answer in preparing for the DR. In cases where the client chooses not to participate in the DR,

conducting this internal review still provides valuable information that you can use. Sample internal review questions include "What were my/our perceptions of the sales process?" and "Was this opportunity in one of our strong service offerings?"

Using the feedback from this internal review, modify your DR question list.

Conduct the DR

A successful DR includes creating and asking the best questions to get the answers you need. It also requires that you honour your time commitment to the client – if you said 15 minutes is what it would take, then don't use 16 minutes unless he requests it.

With the exception of a written survey, accurately hearing the answers and quickly generating the most appropriate follow-up questions is critical. If you ask "How did you first become familiar with us?" and the response is "a referral from a friend who has used you", your "un-scripted" response needs to be something like "May I ask his or her name and may I contact them to thank them for the referral?"

Follow-up

After you have conducted the DR, thank the client in the most appropriate manner. In some cases, you may choose to share some of the DR results as a strategy for maintaining ongoing dialogue.

Analyze the information collected and create action plans to update materials, research additional competitive information, seek alliances, and enhance service offerings. Debrief the sales team to share lessons learned, modify sales process, and understand where your perception might have differed widely from your client's perception.

Also, update your generic question list with additional questions that came up during the DR



What can you learn?

The DR identifies client buying/selection criteria, strengths and weaknesses of your company and services and your competitors' people and services, potential improvements to your sales presentations, sales tactics that did/didn't work, and any services missing from your portfolio.

You can use this information to remarket to prior "lost" clients, modify your services, sales process and people for the correct market perception, target client needs and most of allwin more projects!

Coaching points

Make your DR as complex or as simple as you think is appropriate for each client. Spending the time to customize the questions based on the specific client situation will help provide the detailed analysis to help you figure out what really works and what needs to change.

When you conduct the DR, be sensitive to the client's mindset, current situation as well as body language. Quit while you're ahead – if they don't seem cooperative (even if they agreed to help you), ask a minimal number of questions and gracefully exit. Use your internal review to complete the DR.

Client Satisfaction

What is it?

Providing client satisfaction is more than just asking a client at the end of a project – "How did we do?" The PSE's client satisfaction process includes setting expectations with the client upfront so there is a clear understanding of what it will take to provide satisfaction on the part of the client and you. There are periodic evaluations against the expectation with a final review at the end.

Why do it?

The bottom line of measuring client satisfaction is that satisfied clients will hire you again. In the case of the PSE, client satisfaction provides checkpoints to maintain high performance throughout the project. This process provides additional information to you in assessing your own work performance, habits and expectations.

How do you do it?

Educate client

During the sales process, discuss your PSE and client satisfaction process with the client. Highlight that, while this process requires some of her time, you both will benefit from the clear communication and understanding of expectations and performance measurement.

Set expectations

The client satisfaction process begins with the setting of expectations between the client and the provider. These expectations might include scheduled status reports and structured review sessions, issue escalation and communication protocols. As you develop your PSE process, you will begin to develop a generic list of client satisfaction expectations. Use these to customize a questionnaire outlining basic expectations of quality project delivery for your specific client. Schedule a time to review this with the client to identify which expectations he considers more and less critical to his particular project.

Sample expectations that a client would define as basic, critical or not applicable include "Dedicated team members", "Communicate in advance if commitments will not be met", and "Maintain consultant fees commensurate with value provided."



Conduct periodic evaluation and end-of-project review

Client satisfaction can be effectively measured in different ways – survey, phone interviews, face-to-face interviews and focus groups. Each has its own advantages and disadvantages.

The written survey must be short enough to encourage completion and yet must be comprehensive enough to provide adequate feedback to you in improving your services. The survey process involves questionnaire development, distribution and collection, and results analysis. If you have used an expectations process with the clients, you're asking them to evaluate performance against those expectations. An advantage to the survey is that distribution and collection costs can be low (especially if done electronically), and minimal time involvement is required by the client. A disadvantage to using a survey is that you must rely on the client to generate ad hoc issues on his own since the survey is one-way communication. It also requires a follow-up process to be able to elicit additional feedback after you receive the survey.

The phone and face-to-face interviews can be used to evaluate against expectations or ask a set of pre-determined questions and then solicit ad hoc feedback based on the client's comments. In addition to the personal contact, the advantage is that you can use the two-way discussion to delve into detailed specifics of the client's experience with your group. The disadvantages are that the phone interview requires more time than a survey and also requires scheduling a specific time with the client and the reviewer. The face-to-face interview also potentially requires travel costs. These interviews are often conducted by a neutral third party to provide a comfort level for the client to freely discuss your performance.

While not used normally for measuring against pre-set expectations, focus groups involve a neutral facilitator meeting with a small group of clients for an hour or two to have an open

discussion. Different techniques are used to ask questions and solicit answers about their service experience. Advantages include the ability for clients to use "group recall" -- where comments made by others in the group generate feedback pertinent to a client's own specific experience ("oh, that wasn't our experience, we did...", or "we agree on that, we also..."). In addition, the trained facilitator can help focus the discussion on ad hoc issues that arise during the process. Disadvantages include potential travel costs and time commitment for the clients.

Follow-up

After each evaluation, you will want to identify any changes that you will make to your service delivery process and communicate this to the client. Also, any modifications made to the expectations should be documented.

At the end of the project, you will create a performance summary that can be used in conjunction with other PSE information to identify changes to your sales and service delivery processes to better enable you to target client needs and head off issues.

What can you learn?

Throughout the client satisfaction process, you are learning -- with your client -- as expectations change in importance and new ones are added. This monitoring of expectations and your ability to perform solidly against them, as well as your flexibility to change with them, can build and strengthen your future client relationship.

The key answer you will learn is if the client work with you again. In addition, you will identify ways to enhance your service delivery process.



Coaching points

Setting expectations provide a baseline for measurement. As with the DR, monitor your client's reaction to this request to set expectations. If she is resistant, you can create (and modify throughout) your own set of expectations.

The most successful client satisfaction plans call for a combination of all four types of measurements. All clients get the "checkup" survey at specific periods through a long project. Then based on either a random selection process, or on the size of a client's project, some clients will be phone-interviewed. A quarterly or semi-annual face-to-face interview or focus group might be arranged for client feedback as well as planning purposes.

External Review Support

You may choose to use a neutral external reviewer to conduct your PSE. There are several levels of support an external reviewer can provide. They can provide coaching to you in developing your PSE, can co-conduct the PSE with you or can conduct the PSE and report the results to you. An external reviewer can also help analyze the results and develop action plans.

Since they have no emotional stake in the outcome, external reviewers often make clients more comfortable to discuss you and your performance. The external reviewer may also provide additional credibility for you and your professionalism – you are serious about assessing and improving your performance. The external reviewer also provides you and your team with an unvarnished look at strengths and areas for improvement.

Another advantage to using an external reviewer is that they have experience with interviewing – developing the questions and absorbing and interpreting client responses in order to elicit additional critical information for improving your performance.

Make sure you understand upfront what the external reviewer's deliverables are – do you want a written "data dump"? Will you analyze the data or will they? Do you want coaching points?

As with all other aspects of the PSE, the decision to use an external reviewer for a PSE, or any part of a PSE, should be based on the specific client and project.

Now What Do I Do?

Simply put.....use what you learned.

Critically analyze the information you have obtained. Use this information to modify your behaviours and those of your staff, update marketing and sales materials, design strategies to pursue future bids, update your reference list, document lessons learned and debrief existing and new sales teams, develop alliances and partnerships to strengthen your service offerings.

Also, remember to update/modify/enhance your PSE process to continue your successes!

The Presenter

An IAF member, Susan Nurre Bagheri has designed and facilitated workshops for over 15 years. In 1993, while searching for facilitation resources, she recognized a need for a common source. Out of this came The Facilitator, a quarterly professional newsletter, which Susan continues to publish and has developed a companion-website (www.TheFacilitator.com).

Many different external client and internal corporate situations have provided Susan experience in vision, organizational change readiness, systems requirements, team building, process modeling, issue resolution, brainstorming, and other types of workshops. She has also facilitated various types of electronic meetings and believes in the power of technology supporting facilitators. Over the past 8 years Susan has developed computer-based and self-



paced training and developed and taught instructor-led training courses. She has also developed, modified, and taught facilitation techniques classes.