Capability Report

Deliver Consulting Services

Deliver Consulting Services

Overview

Owner

Professional Services

Description

Delivery of consulting services and training. Assignments can be anything from one day to extended assignments lasting many months.

Training typically comprises standard courses - Foundation, Model Management, and Publishing. Custom training can also be commissioned by the client.

Key activities include:

- Meta-Model design

- Modeling (data capture and diagramming)

- Model Administration

- Reports and outputs

- Proof of Concepts incorporating all of the above

- Model Health Check (of existing work)

Identity Statement:

- To provide value-added support to a client organization

- By means of providing new knowledge, both industry and tool-specific

- In order to achieve (a) better client use of the tool and (b) generate client satisfaction so that (c) groundwork for potential new sales is laid

Key Outputs

Remember, when aiming for desired outputs, think about what inputs are needed and in what format. Think also of the resources required to perform these value-added transformations. These considerations are in the next section.

Output	Type	Description
Assignment Feedback	Data	This could cover some or all of the following: - Initial requirements - Who sponsored the assignment - Who was present and what roles did they play - Modified requirements following initial qualification discussion - What was done - What was delivered - Which tools were used

Output	Type	Description
		- What knowledge artefacts can we re-use Regarding the software capability specifically, this could cover: - Client satisfaction with the what he software actually does (vs what they perhaps expected it would do) - Bugs discovered - Enhancements requested - New tips and tricks - New sales opportunities (software or services)
Client Requirements Fulfilled	Business Event	Service requirements are fulfilled or exceeded. Note, however, that often the requirements evolve during the assignment so a simple comparison is often not enough. A client evaluation is needed. In addition, evidence of the clients requirements being met are contained in the other outputs, e.g. model artefacts, knowledge transferred, and feedback from the assignment. In some circumstances, further work is required - especially if requirements are not met or a separate issue arises requiring escalation.
Model Artefacts	Product	The deliverables handed over to the client, or which you have enabled the client to produce for themselves.
New or Enhanced Knowledge	Capability	Any consulting assignment, by virtue of dealing in knowledge, WILL ALWAYS generate knowledge collateral. The main issue is deciding what can be packaged, catalogued, published, and reused.

What happens next: Downstream Processes

Perform post-assignment review and communications

This is essentially deciding what actions are necessary - e.g.

- Identifying what deliverables (if they are available outside the client's environment), and lessons learned, can be added to the knowledge base for future re-use

- Escalating any issues arising (e.g. "distressed customers")

- Feeding back to Development any bugs or enhancement requests

More routinely, it is the responsibility of the PSG Manager to keep all stakeholders informed (if applicable), e.g. this might include:

- Account Management (keep informed)

- Customer (courtesy call or follow up new opportunities or issues)

- Development (product feedback)

- Intranet\KM (knowledge assets and client deliverables - for cataloguing and publishing)

- Marketing (material for case studies and other marketing collateral)

- Pre-Sales Support (material for new demos, feedback on any of their materials used)

- Product Management (product feedback and wish lists; customer requirements)

- Professional Services Group (keep informed)

- Technical Support - Service Desk (bugs and issues)

- Technical Communications (issues with documentation, ideas for new material)

Finally, there is capture, analysis, and reporting of measures - both output measures (how successful are we) and input measures (i.e. are other stakeholders supporting or undermining consulting activities?)

Uses these Outputs from "Deliver Consulting Services":

- Assignment Feedback
- Model Artefacts
- New or Enhanced Knowledge

The Client's own Processes

This is essentially what the customer does with the assignment deliverables. In short, consulting's primary purpose is to support and enable client objectives.

Uses these Outputs from "Deliver Consulting Services":

- Client Requirements Fulfilled
- Model Artefacts
- New or Enhanced Knowledge

What is required to perform *Deliver Consulting Services*

Figure 1 - Process in a Box (Capability View)
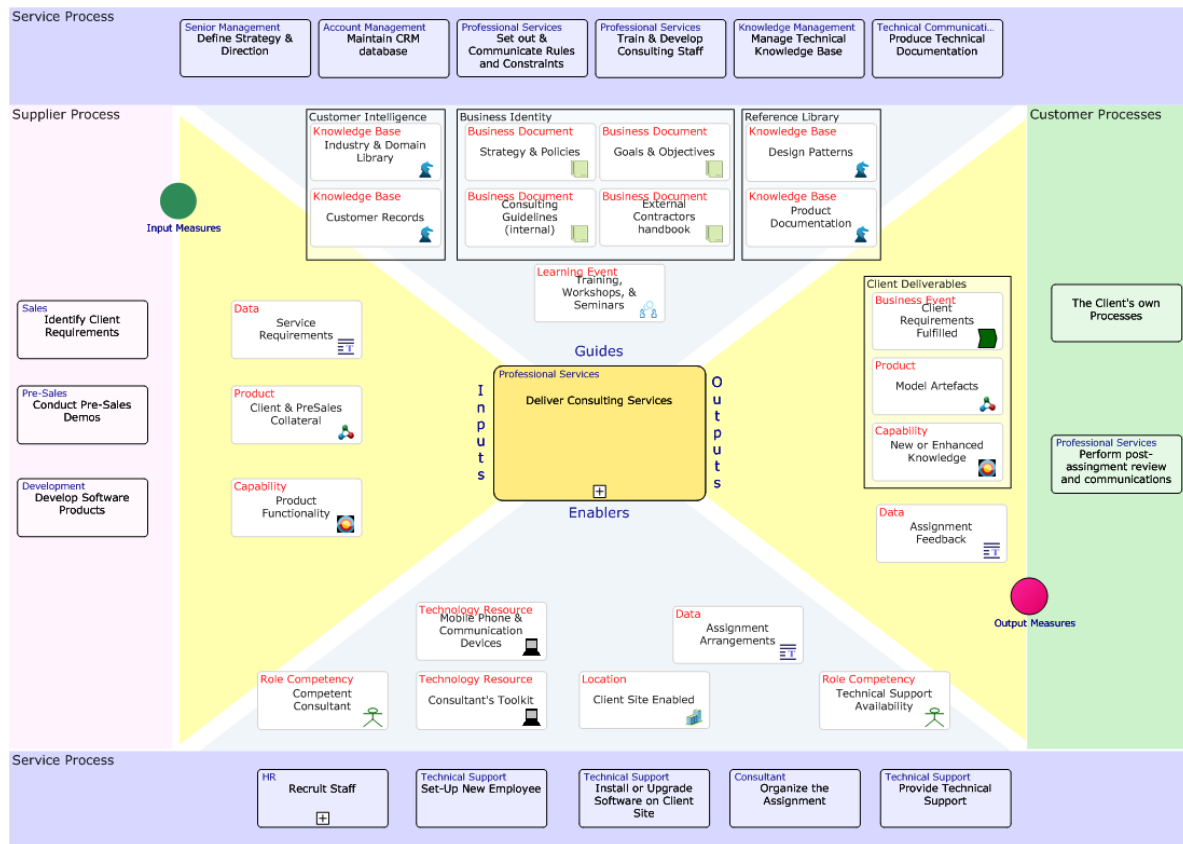
Upstream Inputs

Key Questions to Explore & Evaluate

- Are inputs delivered on-time and in a usable format? Which, if any, prevent the process from even starting?
- How will these inputs be transformed into value-added outputs?

Entity	Description	Supplied By
Client & PreSales Collateral	This can include: - Existing client work and source material (such as Excel spreadsheets, Visio drawings, PowerPoint shows, etc.) - Demo models and Proof of Concept work produced by a PreSales consultant (both generic and client-specific)	Pre-Sales
Product Functionality	This involves the provision of "software functionalities", which are a key component (one of the raw materials) that is transformed into the client solution.	Development
Service Requirements	Outline of what the client is trying to achieve and crucially what the Account Manager has proposed. It is also absolutely essential that service requests states which version of the software is being used so that the consultant can if necessary	Sales

Entity	Description	Supplied By
	prepare a Virtual Machine.	

Guides & Enabling Resources

Key Questions to Explore & Evaluate

- A process is undermined if the necessary management & support processes are not contributing to the main Business Process's success. Therefore, what resources are required that enable and guide the transformation of inputs into value-added outputs?

- Remember that these are usually outside the *direct* control of the Process Owner. Therefore, the key question is how to amplify and optimize, and then maintain, the smooth supply of these Resources.

| Entity	Description	Supplied By
Assignment Arrangements	In addition to basics, such as address, travel, accommodation, start time, and who to ask for, consider especially (failure to do so can cause an assignment to fail even before it's started): - How will work be done - their workstations or own laptop? - If latter, how will data (work done, source files, etc.) be transferred? - What version of the software are they on? If different from yours, do you have it installed on a Virtual Machine? - For training, are they using a network installation or a stand-alone machines? Is the software installed?	Consultant
Client Site Enabled	Before a consultant goes on site, it follows that the client has all the relevant software installed and properly licensed. It is also necessary to agree how work will be done, e.g. using client workstations or using the consultant's own laptop. If the latter, it is important to agree how data will be transferred, e.g. memory stick, visitor Wi-Fi, or the need for recordable DVD or smartphone with sufficient data available. Many different actors have an involvement in this, but ultimately it is for the Account Manager to ensure that this has all been set-up and agreed.	Technical Support
Competent Consultant	This means having someone in place who is able to do the specific assignment. There are two elements to this: - Having the necessary skill set and knowledge to perform adequately in the role of a consultant - Having the most appropriate skills and knowledge for a specific client and what they are trying to achieve For example, assignments that require HTML coding, or data modeling, or simulation are unlikely to be within the skill set of every consultant and it might, therefore, be necessary to subcontract this out. This means: - The Professional Services Manager needs to be able to assign the most appropriate consultant for the specific task - However, he or she is only able to do so if the Team contains a Team with enough breadth of skills (i.e. "variety")	HR

Entity	Description	Supplied By
	- And that variety being available is itself dependent on reading the trends, i.e. appointing consultants with tomorrow's potential, not yesterday's requirements	
Consultant's Toolkit	Hardware: - Laptop with at least 8GB RAM - DVD Recorder - 16 GB Memory Stick Operating Systems & Middleware: - Windows 7 Professional on both main machine and a Virtual Machine - Remote Access Office Productivity Tools: - Microsoft Office Professional on both main and Virtual Machine - Visio - Compression software - PDF Viewer Other - Anti-Virus Software	Technical Support
Consulting Guidelines (internal)	This is intended to cover "rules of engagement", for example, Consultants must: - Satisfy themselves that the Service Request is intelligible and deliverable before the assignment takes place - Escalate any issues that jeopardize the assignment (e.g. promises made by Sales that are misleading or unclear) - Check what version of the software is being used and have that version installed - Agree with client, either beforehand or on site, the parameters of the work, e.g. - - What work needs to be done (in reality, this is often not the same as the service request) - - Where the work is to be done (on their systems or own laptop) - - How the work will be monitored and controlled (e.g. prototyping and review, reporting of work in progress, frequency of handover of work if using own laptop) - - What will be handed over (e.g. model, output, instructions, etc.) and what will not (e.g. other client work, other collateral) - Ensure all travel arrangements have been booked and are accurate before setting off	Professional Services
Customer Records	Ensuring the Customer Relationship Management database is kept up-to-date, e.g. with contact details, number of licenses, version of the software and, perhaps most importantly, records of any previous visits and issues that have had to be escalated..	Account Management
Design Patterns	A section on the intranet that includes useful collateral such as:	Knowledge Management

Entity	Description	Supplied By
	- Demo models - Extended Papers describing certain features of the product - Useful shortcuts, tips, and tricks - Sample code It is also imperative that this is properly designed with an underlying information architecture and these artefacts and resources are simply not "shovelled online" creating an unusable and unfindable mess.	
External Contractors handbook	N/A	Professional Services
Goals & Objectives	N/A	Professional Services
Industry & Domain Library	Whether a formal section on the intranet, or a personal knowledge base, consultants must have at least some familiarity with main trends in the field. See the kybernetica web site, http://www.kybertica.co.uk	Knowledge Management
Mobile Phone & Communication Devices	Smart Phone OR Standard Phone AND Wi-Fi Dongle. This is necessary to allow for internet access at all times (many clients will not allow or provide internet access).	Technical Support
Product Documentation	This includes the "standard" product documentation, e.g. Online Help, Release Notes, Known Issues, User Guides, Videos, etc.	Technical Communications
Technical Support Availability	This involves having available a support Consultant to call upon while onsite to solve emergency or important issues that can derail the assignment, such as: - Software not installed properly or is not licensed - A serious bug that is preventing planned work - this might not be fixable, but the client needs to know what the situation is and whether it is a problem with the software, with the consultant's lack of knowledge, or their own environment	Sales
Training, Workshops, & Seminars	To be effective it is essential that consultants, as essentially workers who generate and transfer knowledge, are provided with the time and motivation to develop their skills and knowledge. This can range from formal training courses, to ad hoc webinars to attendance at conferences. In addition, there should be internal group events, such as, for example "knowledge cafes". The idea of knowledge café comes from David Gurteen (see http://www.gurteen.com/gurteen/gurteen.nsf/id/kcafe).	Professional Services

Appendices

Checklist: List of Stakeholders

Figure 2 - Stakeholder Map
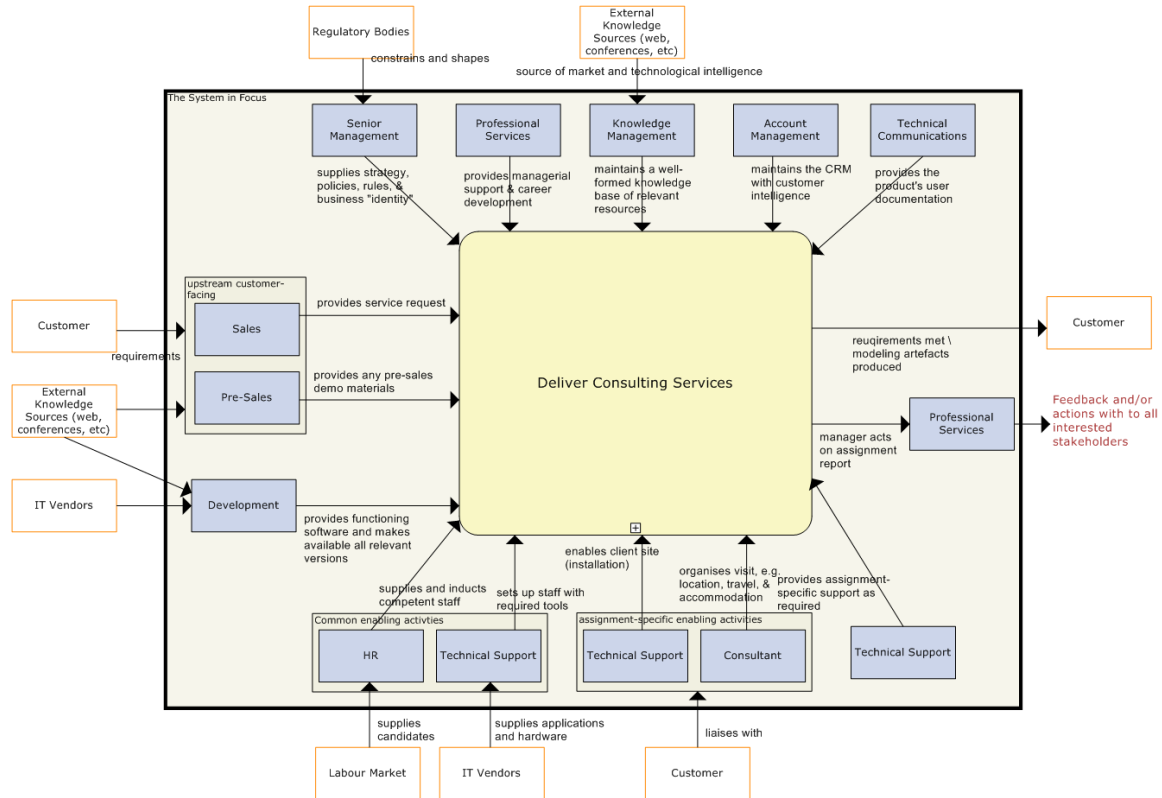
Basic Checklist

Organization	Accountable for	Supplies	Role in this Process
Consultant	Organize the Assignment	Assignment Arrangements	Resource
Pre-Sales	Conduct Pre-Sales Demos	Client & PreSales Collateral	Input
Technical Support	Install or Upgrade Software on Client Site	Client Site Enabled	Resource
HR	Recruit Staff	Competent Consultant	Resource
Technical Support	Set-Up New Employee	Consultant's Toolkit	Resource
Professional Services	Set out & Communicate Rules and Constraints	Consulting Guidelines (internal)	Resource
Account Management	Maintain CRM database	Customer Records	Resource

Organization	Accountable for	Supplies	Role in this Process
Knowledge Management	Manage Technical Knowledge Base	Design Patterns	Resource
Professional Services	Set out & Communicate Rules and Constraints	External Contractors handbook	Resource
Professional Services	Set out & Communicate Rules and Constraints	Goals & Objectives	Resource
Knowledge Management	Manage Technical Knowledge Base	Industry & Domain Library	Resource
Technical Support	Set-Up New Employee	Mobile Phone & Communication Devices	Resource
Technical Communications	Produce Technical Documentation	Product Documentation	Resource
Development	Develop Software Products	Product Functionality	Input
Sales	Services & Training Delivery	Service Requirements	Input
Senior Management	Define Strategy & Direction	Strategy & Policies	Resource
Sales	Identify Client Requirements	Technical Support Availability	Resource
Professional Services	Train & Develop Consulting Staff	Training, Workshops, & Seminars	Resource

Discussion & Management Review: Potential Issues

The success or otherwise of a process depends on the *coordination* of all activities - both upstream processes and those support or service processes that supply resources. To a large extent, these need to be self-regulating - it is impossible to micro-manage or specify all of these interactions, though some formal service level agreements and other quantifiable measures might be necessary.

The evaluation score is qualitative (1 is low, 5 high); there are no underlying figures. To some extent, the evaluation is based on how far these interactions meet the overall Goals, for this process.

Organization	Supplies to this Process	Role	Potential Issues	Current Maturity Evaluation
Consultant	Assignment Arrangements	Resource	Arrangements have not been agreed, or some ambiguity is left hanging, which in turn sets up obstacles to a successful service delivery. For example, does everyone now where and how the consultant will be working - client workstation or own laptop? And if the latter, are there means of transferring work (models, deliverables)? And also, if the latter, does the consultant have the correct version of the software?	3
Pre-Sales	Client & PreSales Collateral	Input	Pre-sales, as the name suggests, is before a sale and is focused on supporting the sale. The problem is that demos will usually be carefully crafted to show the software in the best light. However, the reality may be very different, and the actual consultancy assignment will end up not delivering what was promised. This is not only bad for the customer but also may lead to loss of future sales, while internally, it can lead to distrust which can undermine the company goals, especially collaborative working.	2
Technical Support	Client Site Enabled	Resource	Software is not installed, or certain features do not work (this might not be our fault, but unless it is resolved, the risk is the client will reject the software even before they have started using it). More common is that the software is installed, but the licensing has not been sorted out. Even more of a problem is that licensing has been sorted out, but a consultant arrives and there is no license for them actually log-on. This should all be sorted out and agreed long before a consultant even arrives on site.	4
HR	Competent Consultant	Resource	Recruitment of poor-fit staff - e.g. Going for the wrong skill-set or worse, misunderstanding the actual role, i.e. what the person-in-post has to actually do.	2
Technical Support	Consultant's Toolkit	Resource	Often new starters are left to sort this out for themselves and end up with key toolkit components missing. This can be a problem if the consultant only discovers this while on-site.	3
Professional Services	Consulting Guidelines	Resource	These need to be substantive, relevant and practical. For example, there is little point	1

Organization	Supplies to this Process	Role	Potential Issues	Current Maturity Evaluation
(internal)			prescribing some convoluted "methodology" or meaningless requirement to "always show the standard sales demo" if these edicts are simply ignored (often for good reason, i.e. it adds no value to the client!) They should also set out "negative capability" scenarios, e.g. what to do if a consultant is assigned to an assignment they are simply not equipped to deliver.	
Account Management	Customer Records	Resource	As a database, it is useless unless it is up-to-date, the data is "clean" and unduplicated, and those that need access are given access.	3
Knowledge Management	Design Patterns	Resource	Badly designed and/or poorly maintained intranet so that useful information is lost in the noise. This is symptomatic of a wider problem, namely: No understanding of, or commitment to, the idea of knowledge as an enabler - especially for a knowledge-intensive process like service delivery and consulting. Consider two key principles of Human Performance Technology - Does the consultant have access to relevant knowledge and information in order to do the job? - Do activity standards exist? Therefore, when evaluating this interaction, it should not be just a crude quantitative measure such as "Number of documents on an intranet", but more about the organisation and accessibility of those artefacts and how useful they are.	1
Professional Services	External Contractors handbook	Resource	These need to be substantive, relevant and practical. For example, there is little point prescribing some convoluted "methodology" or meaningless requirement to "always show the standard sales demo" if these edicts are simply ignored (especially by external contractors who have their own expertise and way of doing things). There is a trade-off here between allowing the contractor autonomy and acting on behalf of the commissioning organization.	1
Professional Services	Goals & Objectives	Resource	Not clearly communicated, or they contradict actual ways of working.	1
Knowledge Management	Industry & Domain Library	Resource	No commitment to capturing and - more importantly - managing knowledge. For example, it is not done at all or, if it is, it is done in ad hoc manner with documents "dumped" on SharePoint or a shared drive with no organizing information architecture.	1
Technical	Mobile Phone &	Resource	It is left up to the consultant to obtain and set-up their phone. Obsolete phones are issued so that	3

Organization	Supplies to this Process	Role	Potential Issues	Current Maturity Evaluation
Support	Communication Devices		consultant is unable to tether or access internet. This can be a problem especially if the client has USB ports disabled so that the only means of transferring data is via email. Often, even the web version of the email system is not even communicated making consultants incommunicado when onsite. No guidelines on usage.	
Technical Communications	Product Documentation	Resource	New software is released - and installed on a client site - before the help is ready. Release notes are inadequate - especially when they try to put a "positive spin" on bugs and known issues. If necessary, a non-sanitized version of the release notes should be made available.	4
Development	Product Functionality	Input	If declared functionalities do not work properly or are not adequately communicated, they effectively do not exist for a consultant and as such the end solution is compromised. Also, it is no good producing software that is unlikely to work in a client environment, e.g. supporting only certain operating systems or demanding super-high spec hardware. If so, then the functionality does not, in any practical sense, exist. There is an overlap here with Marketing & Sales. It is no good presenting the functionality as able to do things it cannot.	3
Sales	Service Requirements	Input	Service Request is vague, incomplete, inaccurate, or misrepresents the software capabilities, e.g. - Does not specify what version of the software they are on - Says client wants X (say, set up a process diagram template), when in fact X is only a minor component of the real requirement (say, set up a Process template, produce a set of diagrams, and simulate them) - Uses jargon without any sense of work to be done (e.g. client wants a Process architecture in two days) - Is misleading to client, e.g. set-up automated comparisons, complete with audit trail, between as-is and to-be models. As suggested above, this can often lead to the client Requirements being completely unrealistic, suggesting failure, upstream, to manage expectations.	2
Define Strategy & Direction	Strategy & Policies	Resource	Not clearly defined or articulated or contradictory, especially in relationship to reality or to actual targets and reward systems.	1
Sales	Technical Support	Resource	Technical Support working practices are geared to their own internal targets and not to "revenue	2

Organization	Supplies to this Process	Role	Potential Issues	Current Maturity Evaluation
	Availability		generating" processes. For example, if a consultant on-site urgently needs a license, surely this is more important than more routine request that may be ahead in the queue.	
Professional Services	Training, Workshops, & Seminars	Resource	Training and knowledge development is seen as a luxury rather than an essential investment.	1

Checklist: Guidelines for providing Feedback to Stakeholders

Figure 2 above shows the various stakeholders and how they contribute to "Deliver Consulting Services". It is important, therefore, that communication, both formal and informal, is maintained to ensure that effective coordination between the different activities is optimized.

Consultant supplies **Assignment Arrangements** (Resource)

> **Feedback Guidelines**
>
> Ensure that each consultant has a checklist of things to check when arranging an assignment. Make sure that, based on assignment feedback, this is kept up-to-date.

Pre-Sales supplies **Client & PreSales Collateral** (Input)

> **Feedback Guidelines**
>
> Feedback any of the following issues:- Badly-designed pre-sales materials- Misleading information given to client- How the pre-sales material was used, built-on or discarded. Also, make available any new artefacts or techniques (i.e. assignment outputs) that can be used for future pre-sales work

Technical Support supplies **Client Site Enabled** (Resource)

> **Feedback Guidelines**
>
> Feedback any of the following issues:- Missing or unlicensed software- Poor performance (probably due to client infrastructure issues)

HR supplies **Competent Consultant** (Resource)

> **Feedback Guidelines**
>
> There is no need to communicate with HR after every assignment. However, assignments should be monitored so that job requirements can be updated if the role is seen to be evolving. What might have been the ideal candidate five years ago might not be what is required now. These insights thus become an input into any competency models or recruitment guidelines that are maintained by HR.

Technical Support supplies **Consultant's Toolkit** (Resource)

> **Feedback Guidelines**
>
> There is no need to communicate with Technical Support on this issue after every assignment. However, assignments should be monitored so that toolkit requirements can be updated if the demands of the job require it - e.g. updated software, higher spec hardware, new "non-standard" applications.
>
> Ensure that each consultant has a checklist of what tools they should have (such as Virtual Machines, memory sticks, and backup capability) before an assignment.

Professional Services supplies **Consulting Guidelines (internal)** (Resource)

> **Feedback Guidelines**
>
> Using assignment feedback, need to add to and maintain this knowledge resource. For example, what is written down might not actually be what is done - and for good reason. Also, as each client is different, standardized and overbearing prescriptions may well be counter-productive

Account Management supplies **Customer Records** (Resource)

Feedback Guidelines

Point out any missing or inaccurate client information. Add relevant data from the assignment feedback to the database.

Knowledge Management supplies **Design Patterns** (Resource)

Feedback Guidelines

Provide anything useful from the Assignment Feedback or the Deliverables (e.g. Model Artefacts) to whoever plays the "Knowledge Manager" role (e.g. web site manager, designated web site editor).

Professional Services supplies **External Contractors handbook** (Resource)

Feedback Guidelines

Identify those rules that are meaningless or outdated or inappropriate.

Professional Services supplies **Goals & Objectives** (Resource)

Feedback Guidelines

Identify those goals that are meaningless or outdated or inappropriate.

Knowledge Management supplies **Industry & Domain Library** (Resource)

Feedback Guidelines

Provide anything useful from the Assignment Feedback or the Deliverables (e.g. Model Artefacts) to whoever plays the "Knowledge Manager" role (e.g. web site manager, designated web site editor).

Technical Support supplies **Mobile Phone & Communication Devices** (Resource)

Feedback Guidelines

N/A

Technical Communications supplies **Product Documentation** (Resource)

Feedback Guidelines

Inform Tech Comms of any errors or omissions in the product documentation.

Development supplies **Product Functionality** (Input)

Feedback Guidelines

Product feedback is key, e.g.

- Bugs (especially those that Development consider minor but annoy clients)

- Design and usability flaws

- Enhancement requests.

In an ideal world, these will be used as inputs to the next product development cycle

Sales supplies **Service Requirements** (Input)

Feedback Guidelines

Any feedback reports should always be sent to the sales person. In addition:

- Any client issues

- Product weaknesses

- Misleading information given to client (e.g. promises that the software can do things it cannot)

- Misleading information in the service request

Senior Management supplies **Strategy & Policies** (Resource)

Feedback Guidelines

N/A

Sales supplies **Technical Support Availability** (Resource)

Feedback Guidelines

Provide feedback on how useful any help given was. Also, if help was not available, raise this as an issue as it has a potential revenue cost.

Professional Services supplies **Training, Workshops, & Seminars** (Resource)

Feedback Guidelines

Identify knowledge gaps arising out of assignment, e.g. methodologies, notation, concepts, and where those gaps can be bridged.