

Relevante

Accounting & Technology Consultants



Becoming a STAR Consultant

SUSTAINED TRUSTED ADVISER RELATIONSHIP

Presented by

Fred Kaplan, MBA, CBM

Director of Financial Consulting

Relevante, Inc.

www.relevante.com



1. What Clients Want From Consultants
2. Consultants Clients Don't Want
3. Goals of a STAR Consultant
4. Top Intangible Characteristics of STAR level consultants
5. Top Tangible Characteristics of STAR level consultants
6. Ways to keep your skill sets current
7. Traits of STAR Consultants
8. The Collaboration Process
9. Best Practice Consulting Pattern
10. How to Influence Anyone
11. The Ultimate Tip





- Responsiveness & Dependability
- Knowledge & Skills
- Needs to be met according to timeframe
- Greater value for the dollar
- Six Sigma Quality
- A Trusted Advisor





Consultants who:

- Fail to communicate problems at the right times
- Don't follow through on commitments
- Offer only textbook or packaged solutions without much creativity or customization





Consultants who:

- Don't take the time to understand the client and the business
- Are sloppy about details and don't think situations through
- Are unenthusiastic with a tendency to dismiss ideas before hearing them out





- Create a devoted advocate of the client
- Create a long term relationship for
 - Ongoing Residual Income
 - Generating Referral Business
- Meet the customer's needs on the customers' timeframe
- Exceed the customers' expectations on a regular basis
- Deliver more value than the amount the client pays for (Baker's Dozen)



Top 'Intangible' Characteristics of STAR Consultants



1. Professional dress and demeanor
2. Fast and consistent response
3. High-impact deliverables
4. Timeliness
5. Broad knowledge base



Continued..



6. Preparation
7. Ability to Simplify Complex or Confused Systems
8. Ability to Identify Workable Alternatives
9. Subject Mastery (Deep Knowledge Base)
10. Confidence
11. "E3." Empower. Educate. Entertain

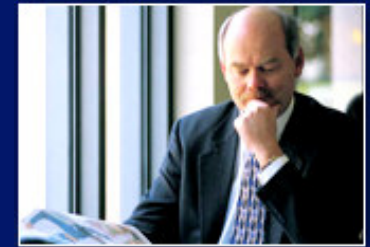




1. Response time
2. Deadlines honored
3. I'm a priority
4. Your support functions are professional
5. I perceive trust and candor
6. You respect our culture and operations
7. You are proactive



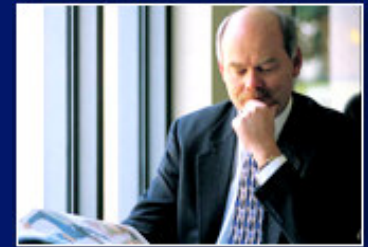
1. Ability to Demonstrate Competence When in Unfamiliar Territory.
2. Organization
3. Habit of Reading Technical Documentation
4. Ability to Control the Client and the Project
5. Ability to Set and Manage Expectations



Continued..



6. Conflict Resolution Skills
7. Employ Critical Thinking
8. Ability to Ask 'Why.'
9. Ability to Identify and Use Consulting Patterns
10. Comfortable with Details
11. Cool under Fire





1. Ask Others for Their Input
2. Seek Negative Feedback
3. Monitor Trends
4. Build "Hard" as Well as "Soft" Skills
5. Seize Opportunities for Informal Learning



Continued..



6. Conduct Informational Interviews
7. Set Specific Goals
8. Think Globally
9. Be Proactive
10. Make a Habit of Reading Business Periodicals and Journals





1. Be "purpose driven"
2. Adopt a distinctive, passionate style of leadership
3. Share information & options with the team
4. Make change exciting
5. Ensure that team members understand the importance of their contributions
6. Motivate people-Assign tasks that are not part of their defined jobs





1. Understand that there is more than one way to successfully completing a project
2. Define the results that you want & not the task
3. Offer suggestions that enable the team to perform at a higher level
4. Give people the room to operate and the freedom to be creative in their approach
5. Reward & Recognize





1. Understand that instilling leadership traits in others is essential
2. Focus on a person's strengths and potential
3. Convince a person that he or she has greatness within
4. Put aside their own agendas to help others express their unique talents.





1. Allow people to vent.
2. Identify the negative assumptions and then reverse them. Ask "What if?"
3. Generate ideas.
4. Identify what's smart about each idea, and look for the patterns that emerge.
5. Pinpoint the dangers.
6. Develop an action plan.





1. Specify the Job (Client signs proposal)
2. Prepare for the Job (Due Diligence)
3. Hold Entrance Interview (Implementation Meeting)
4. Set up the Environment (Environment Preparation)
5. Perform Services (Implementation)



Continued..



6. Test the Work Performed (Cutover)
7. Document the Work
8. Hold an Exit Interview (Engagement Complete)
9. Follow-up on the Work (Ongoing Support)



How to Influence Anyone About Anything



- WIIFM – What’s in it for me?
- How can I provide WIFM and still obtain what I need?
- How do I demonstrate that?





First be successful as a person



THANK YOU & HAVE A GOOD DAY

Fred Kaplan, MBA, CBM
Director of Financial Consulting
Relevante, Inc.