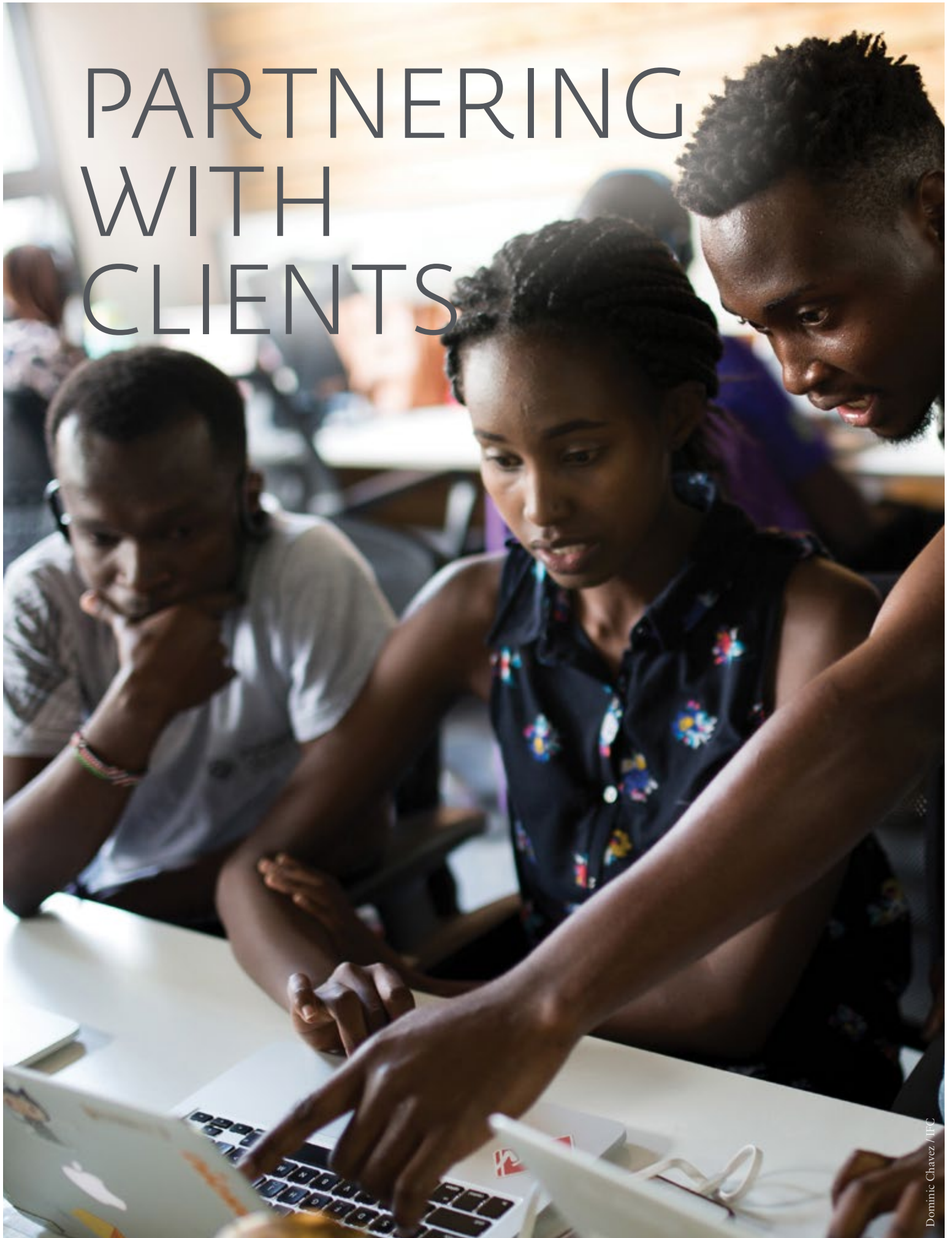


# PARTNERING WITH CLIENTS



## INTRODUCTION

It is critical for all training professionals to maintain a strong relationship with the client throughout the entirety of a project. That is why *Partnering with Clients* lies at the center of the competency wheel, touching all phases of the project lifecycle.

The *Partnering with Clients* competency has five sub-competencies: Demonstrate Awareness of Client Organization, Support Clients in Making Effective Choices, Develop Agreements with Clients, Manage Changes Throughout a Project, and Interact Effectively—all of which are related to effective communication.

Whether you are an internal employee at the client's organization or an external service provider, you have people to whom you provide a service—and the competencies in this category apply.

In the interest of clarity, we define terms used in this section as follows:

- Your client is the principal individual to whom you provide your solution. Typically, a client has day-to-day approval authority. A client differs from the sponsor, who funds the project and has ultimate or final approval authority, although sometimes the same individual will play both roles. Training professionals use the terms client and sponsor whether they work internally or externally.
- Your client is just one of your stakeholders. Stakeholders also include the sponsor, the participants, and anyone with an interest or concern in the solution, such as your business or organization representatives, donors, unions, suppliers, health and safety committees, and your client's clients.

Competent *Partnering with Clients* increases the likelihood that you:

- Get the input you need to achieve or exceed expectations on an assignment.
- Expand your client's and your own thinking about effective and innovative solutions.

- Meet the needs of both the participant and the organization sponsoring the project.
- Minimize misunderstandings, surprises, or disappointments.
- Build commitment to implement solutions.
- Complete projects on time and within budget.
- Maintain client satisfaction throughout the project.

When partnering with clients in emerging markets, it is important to consider additional factors that may affect how you interact with the client, for example:

- How will you accommodate the local societal, religious, political, gender, and corporate norms of the client?
- What economic, legal, and political factors may affect the program's cost, timeline, content design, and delivery?
- What is the most effective, culturally appropriate, gender appropriate, and technologically feasible means of communicating with the client and the participants?
- How are women perceived in the organization and what are the client's expectations regarding training, mentoring, and coaching both men and women? How will you prove the business case for gender-inclusive programs?
- Who is responsible for researching, organizing, and paying for logistics, infrastructure, and technology, the safety and security of program contractors and participants, and the establishment of social networks to reinforce learning and enhance the impact of the program?
- What risks are there? What preventive measures and contingency actions need to be incorporated in the plan, such as emergency responses in fragile and conflict-affected situations?

You need to identify, discuss, and agree upon these considerations with your client, so that everyone has the same expectations from the beginning. This allows you to consider any challenges to the delivery of the project up front and factor them into the timeline and execution plan.

For additional information on *Partnering with Clients* when conducting training in fragile and conflict-affected situations and gender-inclusive training, please refer to the FCS and gender supplements at the end of this guide.

# PARTNERING WITH CLIENTS

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# 1. Demonstrate awareness of client organization



## Importance

The impact of mastering these competencies is that you:


- Gain or maintain credibility with your client and other stakeholders.
- Align learning with the vision, values, and direction of the organization.
- Contribute to realistic project plans that can be implemented efficiently.

## Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

<b>1a</b>	<b>Demonstrate awareness of the vision, values, and strategic direction of organization/work unit</b>
<input type="checkbox"/>	Conduct initial research before meeting with clients
<input type="checkbox"/>	Describe the priorities of specific lines of business, functions, or work units
<input type="checkbox"/>	Identify challenges and opportunities in external environments that affect directly the organization/work unit <ul style="list-style-type: none"><li>▸ Safety of participants and program providers  </li><li>▸ Economic stability, business conditions, mergers and acquisitions, and impending legislation</li><li>▸ Accessibility, availability, and reliability of information and communication technology at the program location</li><li>▸ Infrastructure and logistics including venues and services (for example, utilities, transport, catering and accommodation)</li></ul>
<input type="checkbox"/>	Assess implications of this knowledge for performance and learning
<b>1b</b>	<b>Demonstrate knowledge of how work gets done in client organization / work unit</b>
<input type="checkbox"/>	Demonstrate knowledge of organizational structure and functions
<input type="checkbox"/>	Demonstrate knowledge of key inputs and outputs
<input type="checkbox"/>	Demonstrate knowledge of key organization processes
<input type="checkbox"/>	Demonstrate knowledge of how roles communicate in the organization
<input type="checkbox"/>	Demonstrate knowledge of how decisions get made (for example, speed of decision making, who is involved, who has authority, key influencers, consensus versus hierarchy, layers of approval)
<input type="checkbox"/>	Determine how the client will qualify participants to the program

**1C Demonstrate knowledge of client organization/work unit culture**

- ▶ Use language and common acronyms of the organization
- ▶ Identify whether the culture of the client is one that prioritizes relationship building and trust above completing transactions, or vice versa
- ▶ Demonstrate knowledge of the norms, environment, conditions, and demographics of the program participants of the organization/work unit (for example, literacy rates, gender ratio, urban or rural locations, religious requirements)
- ▶ Determine how women are perceived in the organization and the client's awareness of issues related to gender inclusion 

**Key outputs and assessment criteria**

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Learning aligned with strategic direction	Organization vision, values, and strategic direction supported
	Specific links to vision, values, and strategic direction included where applicable
	Current or imminent realities in external environment taken into account
Project plans	Appropriate stakeholders involved based on knowledge of organization
	Decision-making norms in the organization reflected
Professional credibility	Demonstrate understanding of the organization/work unit
	Professional credibility acknowledged by clients and other stakeholder

## 2. Support clients in making effective choices








### Importance

The impact of mastering these competencies is that you:

- Provide effective and efficient learning solutions.
- Avoid jumping to simplistic solutions and being swayed by current fads.
- Gain or maintain credibility with your client and other stakeholders.
- Behave in an ethical and professional manner.



### Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

<b>2a</b>	<b>Propose solutions based on foundational and evolving best practices</b>
<input type="checkbox"/>	Information on evidence-based best practices from learning and other fields in emerging markets
<input type="checkbox"/>	Explain current and emerging research regarding best practices in learning and performance
<input type="checkbox"/>	Communicate how gender equality and gender inclusion can benefit their business 
	‣ Explain how training women will help clients/donors achieve their goals and benefit their businesses
	‣ Prepare information sessions to communicate benefits to clients
<input type="checkbox"/>	Identify the evidence that is needed to support ideas about learning and performance
<input type="checkbox"/>	Challenge your own and others' assumptions that limit learning and performance
<input type="checkbox"/>	Communicate how accommodating participants' psycho-emotional needs can benefit program results 
<input type="checkbox"/>	Leverage client, participant, and other stakeholder expertise and knowledge
<input type="checkbox"/>	Support the right decisions that are consistent with professional ethical behavior
<b>2b</b>	<b>Consider a range of options</b>
<input type="checkbox"/>	Consider long-term and short-term implications
<input type="checkbox"/>	Engage client, participants, and other stakeholders in considering options
	‣ Explore viability of digital solutions  
	‣ Explore mentoring and coaching and ways to build resilience  
	‣ Explore ways to boost and enhance female participation in the program 
<input type="checkbox"/>	Use an iterative approach to test ideas early and often
<input type="checkbox"/>	Integrate different perspectives
<input type="checkbox"/>	Synthesize and reorganize ideas
<input type="checkbox"/>	Use constraints as an opportunity for creativity (for example, alternatives to face-to-face training)
<input type="checkbox"/>	Create prototypes to test design ideas
<input type="checkbox"/>	Assess options against established criteria

- ▶ Advocate for the best solution for the client, participant, and organization
- ▶ Offer alternative solutions as appropriate, highlighting risks and mitigations

## 2c Support stakeholders in promoting the solution within the organization

- ▶ Provide guidance and advice to help stakeholders prepare for key meetings on learning
- ▶ Provide data to support learning decisions within the organization
- ▶ Provide examples to support decisions about learning within the organization
- ▶ Provide key messages for communications about change and learning
- ▶ Identify the most effective culturally appropriate, gender appropriate, and technologically feasible means of communication  

## Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Effective and efficient learning solutions	Based on accepted best practices in performance and learning
	Participants' reality and underlying needs addressed
	Collective expertise of multiple stakeholders reflected
	Longer-term needs of organization taken into account
Acceptance of solutions within organization	Client, stakeholders, and sponsor recognize any limiting assumptions, including political instability and barriers to women's participation
	Client is supported in making a persuasive case for an effective, efficient solution, including the business case for supporting gender-inclusive programs or those specifically targeted to women
Professional credibility	Professional credibility acknowledged by clients and other stakeholders



# 3. Develop agreements with clients






## Importance






The impact of mastering these competencies is that you:

- Calculate projects' costs accurately.
- Plan project tasks, timing, and resource requirements accurately.
- Anticipate potential problems and put preventive and contingent actions in place.
- Meet or exceed client expectations for a project.
- Complete tasks (or project) on time.

## Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

<b>3a</b>	<b>Clarify client expectations regarding a project</b>
<input type="checkbox"/>	Ask questions to learn about the client's situation, purpose of the assignment, performance issues to address, and priorities
<input type="checkbox"/>	Determine client's commitment and capacity to support the program in an FCS setting 
<input type="checkbox"/>	Agree on the official language of the project and translation requirements
<input type="checkbox"/>	Determine key values that the client wants to convey or reinforce in the program
<input type="checkbox"/>	Ask questions to identify underlying concerns that might affect the program
<input type="checkbox"/>	Summarize and restate client expectations to ensure agreement
<input type="checkbox"/>	Determine how the client plans to decide which participants qualify to participate in the program
<input type="checkbox"/>	Determine appropriateness of monetary incentives for participants  
<input type="checkbox"/>	Determine confidentiality requirements
<input type="checkbox"/>	Confirm contract terms and conditions 
<input type="checkbox"/>	Determine the most appropriate methods for monetary transactions 
<input type="checkbox"/>	Determine client knowledge of the design and development process required to produce the work
<input type="checkbox"/>	Determine measures of success
<b>3b</b>	<b>Gather information about previous similar projects</b>
<input type="checkbox"/>	Assess client willingness and ability to share prior information with you
<input type="checkbox"/>	Investigate past experiences with the client, sponsor, and stakeholders
<input type="checkbox"/>	Investigate the process and outcomes of prior projects of similar type and scope
<input type="checkbox"/>	Investigate the reliability of information provided on prior projects
<b>3c</b>	<b>Clarify roles of client, participants, other stakeholders, and performance and learning professional(s)</b>
<input type="checkbox"/>	Identify whom to involve and the nature of their involvement
<input type="checkbox"/>	Identify available local or international resources (for example, trainers, designers, consultants, business learning specialists)

- ▶ Identify accountabilities for the client, participants, and other stakeholders (for example, who is responsible, accountable, supporting, consulted, informed)
- ▶ Identify who is responsible for researching, organizing, and paying for:
  - Catering, venue and equipment requirements 
  - Safety of participants and providers, including travel, venue and transport, and insurance and emergency services  
  - Establishment of social networks to reinforce learning and enhance the impact of the program
- ▶ Clarify who makes project decisions and how (for example, consensus, unilateral, change control process)
- ▶ Identify your role on the project, how you interact with others, and how your role affects upstream and downstream processes
- ▶ Identify communication protocols within your organization as well as in the client organization (for example, hierarchical or decentralized communication between project team members)
  - Discuss appropriate/available communications channels for the program  
- ▶ Refer to other experts as necessary to supplement your own knowledge or source other areas of expertise (for example, change management, recruiting, human resources, organization development)

- 3d Negotiate assumptions and deliverables, as well as level of quality, timing, and cost**
- ▶ Define project scope based on competencies in the assessing and designing categories
  - ▶ Determine how the client wants to prioritize trade-offs among cost, time, and quality
  - ▶ Set protocol for scope changes
  - ▶ Plan purpose and timing of meetings
  - ▶ Determine how the client would like to receive communication on status of the project
  - ▶ Determine acceptance criteria at each stage of the deliverables
  - ▶ List assumptions that affect project scheduling, deliverables and costs

## Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Verbal and written agreements with clients	Client expectations reflected
	Stakeholders and roles identified
	Assumptions, deliverables, timing, and costs identified
Project plans	Plan makes best use of organization resources
	Project cost estimates are accurate
	Dates, dependencies, resources, durations, and costs identified
	Schedule is articulated
Professional credibility	Professional credibility is acknowledged by clients and other stakeholders

# 4. Manage changes throughout a project


## Importance

The impact of mastering these competencies is that you:

- Respond effectively to unavoidable changes.
- Prioritize changes based on the impact of learning and performance.
- Complete projects on time and within budget.
- Manage your own workload and the workload of others on the project.
- Gain or maintain credibility with client and other stakeholders.

## Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

<b>4a</b>	<b>Develop realistic project plans</b>
<input type="checkbox"/>	Define the activities required to complete the work
<input type="checkbox"/>	Determine dependencies and sequence activities
<input type="checkbox"/>	Estimate resources, durations, and costs, including indirect costs that might drive up the costs of this project (for example, stipends, meals, transportation)
<input type="checkbox"/>	Develop a schedule
<input type="checkbox"/>	Identify risks and plan preventive and contingency actions including emergency responses 
<b>4b</b>	<b>Keep projects on track</b>
<input type="checkbox"/>	Manage time and scope of work to keep projects on schedule
<input type="checkbox"/>	Keep client apprised of progress
<input type="checkbox"/>	Communicate status and issues proactively to key stakeholders
<input type="checkbox"/>	Communicate with team members and subject matter experts on work status
<input type="checkbox"/>	Refer to project plan and in-scope and out-of-scope items when making decisions
<input type="checkbox"/>	Anticipate and proactively manage risks
<b>4c</b>	<b>Negotiate changes in scope</b>
<input type="checkbox"/>	Explore trade-offs among deliverables, timing, and costs
<input type="checkbox"/>	Determine impacts on other organization projects if changes are made in this one
<input type="checkbox"/>	Inform key stakeholders of impact of change request prior to implementing
<input type="checkbox"/>	Obtain approval from the appropriate stakeholders

## Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
<b>Project change requests</b>	Change requests that identify reasons for change and the impact on time, quality, cost
	Change requests are based on exploration of options with client and stakeholders
<b>Project plans</b>	Project cost estimates are accurate
	Dates, dependencies, resources, durations, and costs are identified
	Schedule is articulated
	Plan is updated throughout project to guide work
<b>Professional credibility</b>	Professional credibility is acknowledged by clients and other stakeholders

# 5. Interact effectively


## Importance

The impact of mastering these competencies is that you:

- Get the input you need to provide the best possible solutions.
- Build commitment to implementation by involving others.
- Help the client and stakeholders learn about the field of performance and learning.
- Gain or maintain credibility with client and other stakeholders.

## Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

<b>5a</b>	<b>Seek input from client, participants, and other stakeholders</b>
<input type="checkbox"/>	Involve client, participants, and other stakeholders to gather information and different perspectives
<input type="checkbox"/>	Engage client, participants, and other stakeholders to build commitment
<input type="checkbox"/>	Ask questions that promote breakthrough thinking and generate insights
<input type="checkbox"/>	Ask for and respond to feedback
<input type="checkbox"/>	Collaborate effectively with people across borders, languages, cultures, genders, and generations
<b>5b</b>	<b>Present information and concepts clearly and succinctly</b>
<input type="checkbox"/>	Determine client's current level of knowledge about learning and the design process
<input type="checkbox"/>	Explain the alignment between learning and the business strategy and priorities, including the business case for gender-inclusive learning programs or those specifically targeted to women 
<input type="checkbox"/>	Illustrate learning concepts, research, and technology
<input type="checkbox"/>	Establish expectations for time to full proficiency after training
<input type="checkbox"/>	Use technical terminology of the client's field, industry, or industry segment
<input type="checkbox"/>	Show respect for stakeholders' time
<b>5c</b>	<b>Manage differences of opinion among stakeholders</b>
<input type="checkbox"/>	Clarify issues
<input type="checkbox"/>	Reframe disagreements in neutral terms
<input type="checkbox"/>	Facilitate the development of solutions
<input type="checkbox"/>	Identify and show sensitivity to the needs and boundaries of others
<input type="checkbox"/>	Know when to compromise or stand firm, if there are different perspectives

**5d Act as an ambassador for your group**

- ▶ Demonstrate knowledge of foundational and evolving best practices
- ▶ Demonstrate awareness of current issues in the field
- ▶ Demonstrate knowledge of the range of services your group can provide
- ▶ Match services with the appropriate client and situation
- ▶ Demonstrate high ethical and professional standards
- ▶ Suggest innovative solutions that meet the client's needs

**Key outputs and assessment criteria**

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
<b>Interactions with clients and other stakeholders</b>	Client and stakeholder input is reflected
	Learning concepts are explained clearly and succinctly
	Alignment of learning to business strategy and priorities is explained
	Client terminology is used
	Discussion encourages participation and sharing
<b>Feedback from client</b>	Verbal and written feedback from client is positive