



PORTALS & COLLABORATION

IDEAL CLIENT PROFILE

WHAT IS AN *IDEAL CLIENT PROFILE*?

Defining Client Success:

Identifying and determining overall impact of a potential client relationship is key to success in delivery as well as perceived value of a team's contribution.

Failure is oftentimes a result of poor planning, but most likely due to misunderstood potential.

If a client is unsure of a team's contribution or outcome, it's likely the delivery falls short of expectations.

Success is determined by clear, concise communication and well defined expectations. To ensure success, a team's first step is to define potential engagement by role.



IDEAL CLIENT PROFILE

A Preferred Client Profile is a scoring system designed to ensure client engagement is successful. The PCP Scorecard provides insight into the likelihood that an engagement will result in success through ranked, weighted and scored criteria.

CREATING BETTER RELATIONSHIPS

The ICP Scorecard Improves the Perceived Value of Corporate Services

Thought Leaders in
Strategic Thinking

Diverse Technology
Services & Offerings

Continually Improving
Productivity & Efficiency

Customer Relationship

Proactive Delivery of
High-Quality Service

Recognized as a Valued
Advisor & Partner

Focus on Building
Lasting Relationships

Technology Leaders

Comprehensive and
Innovative Solutions

Provide Integrated
Business Processes

Reduce Complexity &
Enhance Simplicity

Operational Excellence

Meet and Exceed Client
Expectations

Ease of Customer
Experience/Interaction

Improve Resource and
Budget Allocation

Industry Expertise

Improve Collaboration, Research and
Technology Development

Provide Industry's Top Talent

Develop Team's Operational
Management Skills & Communication

CLIENT EVOLUTION & MATURITY MODEL



DEFINING THE PERFECT CLIENT

Client Engagement by Role

Identifying individuals throughout the enterprise as potential clients can be a difficult, time consuming practice. By defining the role of an individual, we can assign the appropriate level of effort to ensure our engagement is successful.



Understanding the goal with each level of potential engagement is an effective way to communicate the team's contribution to the enterprise and to align our services with others in the organization.

Engagement Roles Include:

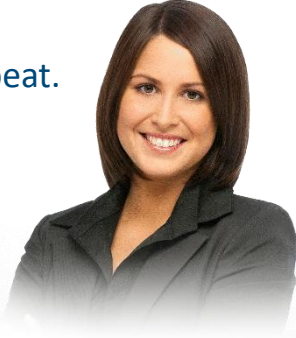
- Suspect
- Prospect
- Customer
- Client
- Advocate
- Evangelist
- Partner 🏆

DEFINING THE PERFECT CLIENT

Engagement Role

Suspect:

Basically, anyone with a heartbeat. The entire organization can be considered a suspect for the *Portals & Collaboration* team. Engagement at this level is More social awareness of services and expertise.



ENGAGEMENT GOAL:

Communicate skills, offerings, expertise. Socialize, engage and otherwise market to this individual to promote services and offerings. Everyone is a potential sales person for Portals and Collaboration. Remember, everyone wants to share a solution, our job is to let everyone know a solution is available.

Engagement Role

Prospect:

Suspects with needs that we can meet are clearly prospects. Prospects are defined as anyone with a clear need that can communicate the need in terms that show they're aware of our ability to solve their challenges.



ENGAGEMENT GOAL:

Conversion. This is the best role to interview for potential conversion to customer. Listen, understand, clarify, ease scorecard into conversation for potential fit and offer examples of successes to similar challenges. Relate. Empathize.

DEFINING THE PERFECT CLIENT

Engagement Role

Customer:

Defined as someone with a vested interest in our team, preferably someone with a success story. We know them. We can think in terms of how our services meet their challenges.



ENGAGEMENT GOAL:

Continued and sustained communication is key. We need to think in terms of how to improve their process, productivity and efficiency. We need to understand clearly their contribution to the enterprise and always be thinking of ways to engage them with new solutions (and benefits).

Engagement Role

Client:

Customers who repeat business are our clients. This level should be our primary focus. Repeat engagements are a sign of trust and respect. Repeat engagement indicates a level of dependency on our ability to help them succeed.



ENGAGEMENT GOAL:

Research their contribution. Spend a significant amount of effort engaging with clients to ensure all opportunities have been completely addressed. Offer services with high a perceived value to show commitment to their success. Learn ways to improve their process. Be prepared to discuss upcoming trends and offer to sit in on meetings and planning sessions.

DEFINING THE PERFECT CLIENT

Engagement Role

Advocate:

Clients who promote teams that helped them reach their goals are called advocates. Advocates are always willing to sell for the team and are passionate about sharing who helped them.



ENGAGEMENT GOAL:

Spend a lot of time empowering advocates. Share new ideas and innovative solutions. Help advocates help us by sharing the team's services and expertise. Share emails, accolades, announcements, new technologies... anything that will give the advocate information they can use to build a case for engagement.

Engagement Role

Evangelist:

When advocates effectively turn others into clients for the team, they're referred to as evangelists. Evangelists influence others in speeches and seminars. Teams Should help evangelists speak on their behalf.



ENGAGEMENT GOAL:

Evangelists are internal subject matter experts that make connections between interdepartmental teams. Share success stories and introduce to prospects. Encourage evangelists to speak openly about engagement strategies. Invite evangelists to events to gain deeper insight into how the team interacts and contributes to the enterprise.

DEFINING THE PERFECT CLIENT

Engagement Role

Partner:

The team's goal is to turn all clients into partners. Oftentimes, partners take on the financial burden of a given project or solution and allow the team to focus on service, innovation and, if required, ongoing support and maintenance.

The partner's advantage is increased productivity, enhanced and streamlined efficiencies that are designed to maximize potential value for the enterprise as a whole.

The team's goals are to focus on innovative technologies and creative problem solving that improve the potential for a partner to meet their goals. The team's objective is to research new technologies and apply potential solutions that benefit a partner's focus area.



Engagement Goal:

The team's ultimate goal is to identify clients that have the potential for long-term relationships. As long-term relationships mature, so will the team's reputation for successful resolution. Research business owners and executive sponsors, their contributions, their position within the organization and potential for ongoing engagement. *Involve leadership.* Prepare overviews that show the connection, solution and benefit.

THE *IDEAL CLIENT PROFILE* SCORECARD

Rank	Weight (1-5)	Criteria	Score (1-10)
1		Willingness to listen to advice and accept consultative services	
2		Open, positive attitude toward established client management style	
3		Funding/Budget approved, room to expand project	
4		Project's impact on enterprise	
5		Prospect's influence within enterprise and with executive leadership	
6		Scope for improvements, upgrades and ongoing maintenance & support	
7		Well defined need aligning with larger corporate/enterprise focus areas	
8		Executive sponsorship/Leadership buy-in	
9		Alignment with current year goals and focus areas	
10		Knowledge of Corporate Services service offerings, technologies, etc.	
11		Clearly established path to success/initial discovery	
12		Recognizes the Portals & Collaboration team's contribution to Technology	
13		Clear plan for engagement and readiness to start	
14		Can competently communicate need for engagement with team	
15		Dedicated staff with thorough understanding of Business Owner's expectations	
16		Prospect's team is clearly defined and organized with defined roles	
17		Willingness to partner with team for long-term relationship	
18		What impact does the prospect's potential solution have on the enterprise?	
19		How many individuals will benefit from the prospect's solution?	