Raymond JAMES CONSULTING

World Class Consulting Training

July 18, 1998
Dallas, TX

World Class Consultant Training

Version 1.0

Who Is RJC

The RJC Vision Statement

- To be the premier provider of information technology solutions that enhance our clients performance.
- To achieve creative and practical results by engaging the best people, practices, and partners.
- To be competitive in the marketplace and collaborative in the workplace.
- To extend trust, expect excellence, demand competence and reward results.

Handout 1 (I.A.1)
One copy for each participant

RJC Vision

To be the premier provider of information technology solutions that enhance our clients performance.

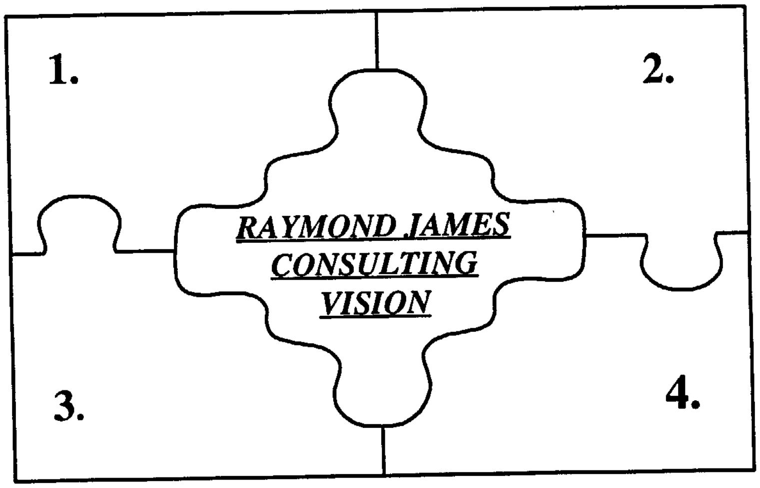
To achieve creative and practical results by engaging the best people, practices, and partners.

Superior recruiting practices, Constant training and guidance,
Practices: Goal seeking, strategic approach to practice and partners,
Our clients are our partners,

To be competitive in the marketplace and collaborative in the workplace.

To extend trust, expect excellence, demand competence and reward results.

RJC FOCUS: THE BUILDING BLOCKS



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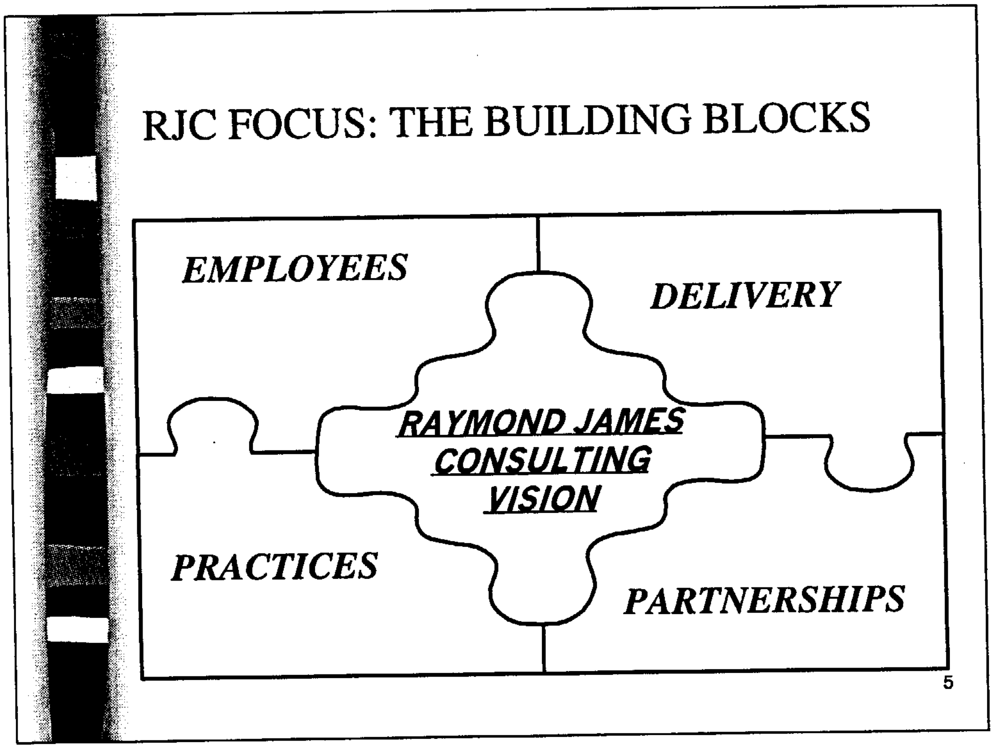

projects > $150,000 < $2 mill
companies > $250 mill

77
2 m

70
30,000

Account Mgr role

The RJC Difference - Practices

Distributed Systems Practice

- Infrastructure Discipline
- Internet Discipline
- Application Development Discipline

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Sub-disciplines

Lotus Notes — Marie Harzfeld working w/ Apples on this

Tony & Bob Edwards (needs to work w/ David Kiff)
8 people [Might have already been brought into Lockheed?]

Package Implementors

"Business Consultants who do technology"

Dieter brought up Business Intelligence Cognos

Sales Force Automation

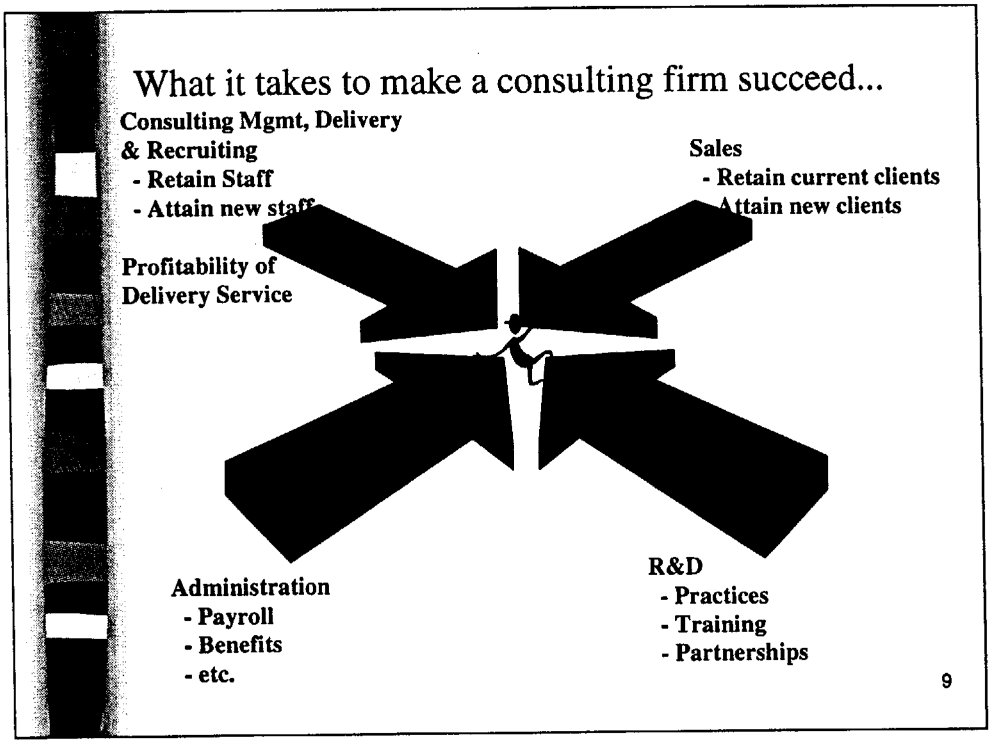
Project Mgmt Practice DFG is seed

$20 mill ann by end 1999 (including San Antonio)

now $11 mill — Run Rate (annualized daily revenue)

1995 $2 mill

Understanding Our Business



Susan Paul is trying to earn RJC partner of the year with Microsoft

SALES

- Process - TAS (Target Account Selling)

  - Understand customer application, our value to the customer and our risk, compelling events, politics

  - Trained Account Executives

  - Sandler Training

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Sandler - a "different" way of selling to a client. A different way of cold calling.

Human Resources

Retention
Develop People/Careers
Advocate
Utilization
Performance Management
Project Assignment
Company Policy/Traditional HR

Human Resources

Retention - #1

Develop People/Careers - #6

Advocate - #5

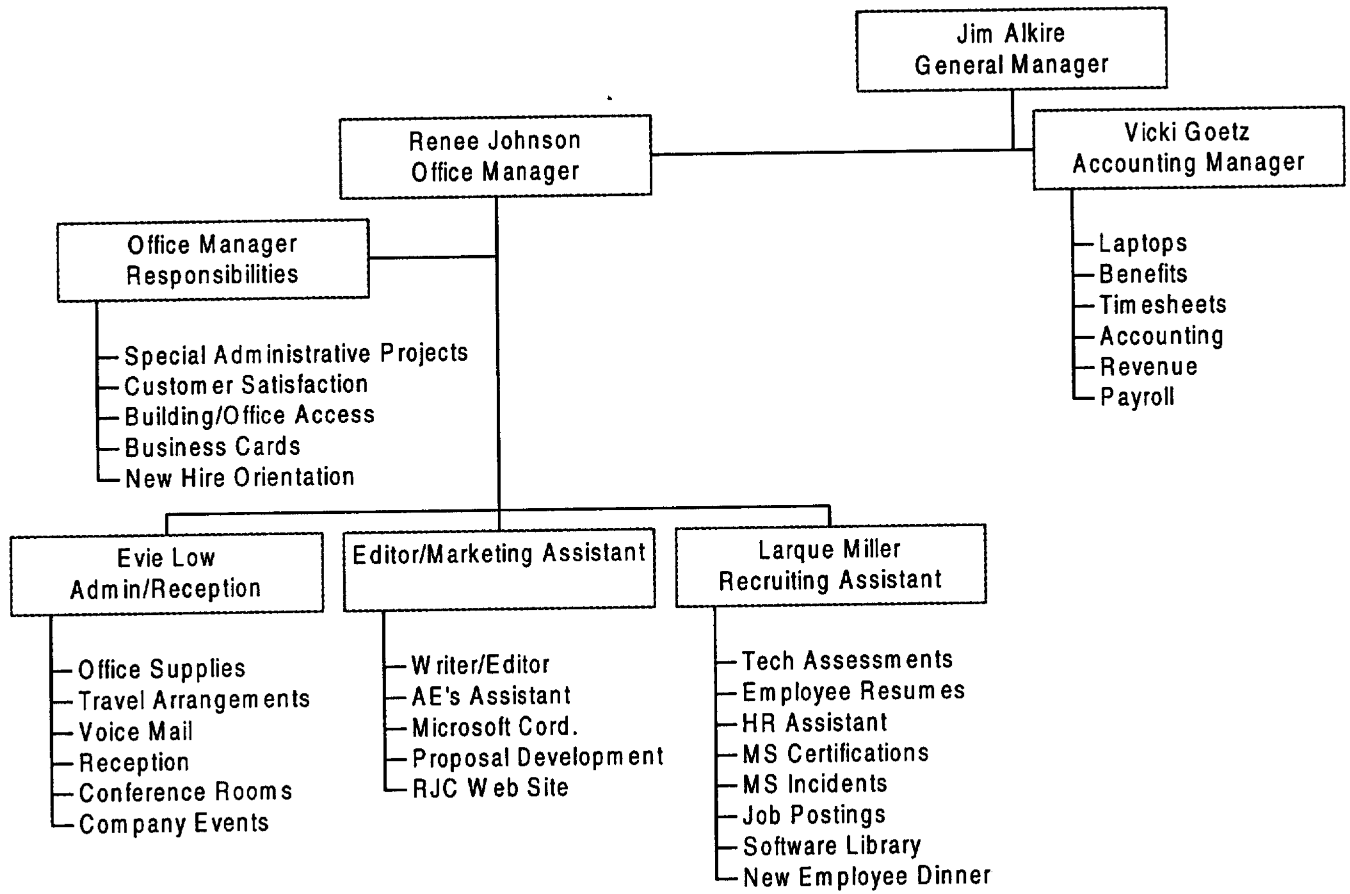
Utilization - #2

Performance Management - #4

Project Assignment - #3

Company Policy/Traditional HR - #7

Administrative Services



Practice Development at RJC

- Better opportunities
- Improved Profit
- Sustainable Business
- Allows growth
- Consultants

Three Keys to Practice Development

- Technology
- Partnerships
- Market
  - Market size (in Metroplex) 15-25 consultants a year?
  - Competition
  - Recruiting (Why should someone join RJC)
  - Current Skills

This Means You!

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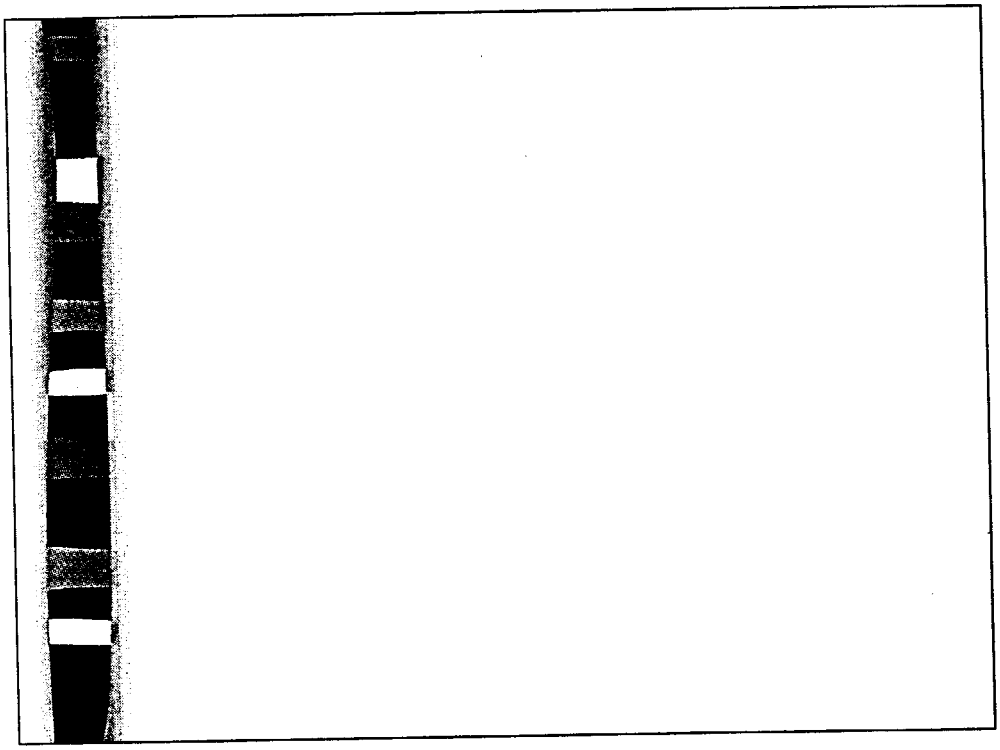
Focused
Expertise
Consistency
Profitability
Skill Focus

HP may be a good partner
Dieter said Cisco is possible



What Do You Know?

Developing a practice

What Do You Know?

- What is Your Customer Buying
- What are the High Earnings Skills
- What Skills are Recruiters Looking for
- What are the Trade Rags Discussing
- What are Research Groups like the Gartner Group Saying
- Market Size Partners
- Competitors - Talk to Your Colleagues
- Customers - What Causes this Business Issue
- Practice Managers are focus

Financials

Understanding the Numbers

REVENUE = Bill Rate x Hours

- **Example:**

  $100/Hour

  <u>x 40</u>

  $4000 Revenue

Subtract Direct Costs

Subtract Direct Costs

- Costs
  - Salaries and Incentives
  - Benefits
  - Taxes
  - Idle Time
  - Insurance
  - Training
  - Practice Development
  - Sales/Marketing Assistance
  - Proposal Development
  - Web Development
  - Software
  - PPM Program ← Partnership Program w/ Microsoft
  - Travel/Food/Hotel for Training

60% salaried
35% hourly
rest are "1099" Subcontract

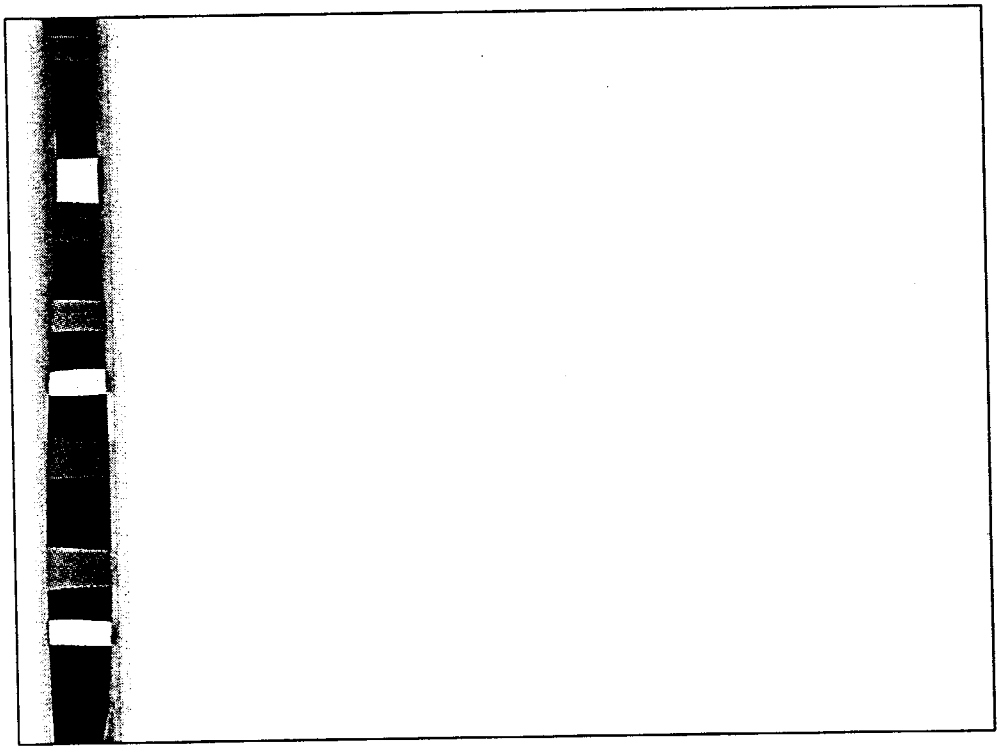
Revenue - Direct Costs = Gross Profit

- **Example:**

  $4000 Revenue

  - $2500 Cost

  $1500 Gross Profit



SGA: Cost of Doing Business

SGA: Cost of Doing Business

- Recruiting
- HR
- Admin
- General Management
- Sales Tax
- Insurance
- Rent
- Sales Expense
- Office Expense
- Job Fairs
- Return to Investors
- Property Tax
- Accounting
- Legal
- Business Meetings
- Social
- Equipment Leases
- Bad Debts

Gross Profit - SG&A = Net Profit

(Sales and Recruiting, General Office, and Administration Costs)

- **Example:**

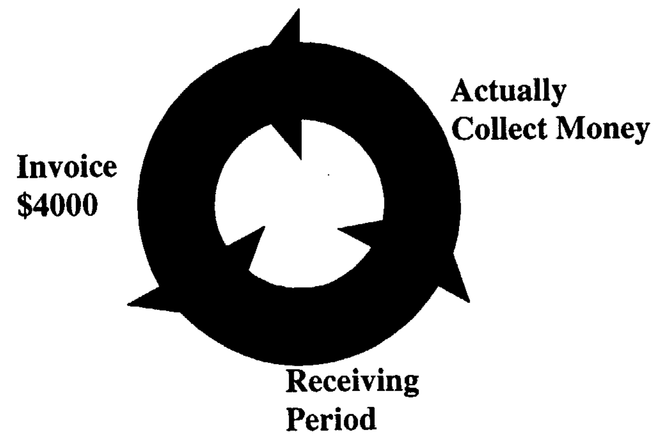
  $4000 Revenue

  -$2500 Direct Costs **(Gross Profit = $1500)**

  - <u>$800</u> SG&A

  $700 Net Profit

Finally: Collecting What We Earned



What This Means...Cash Flow

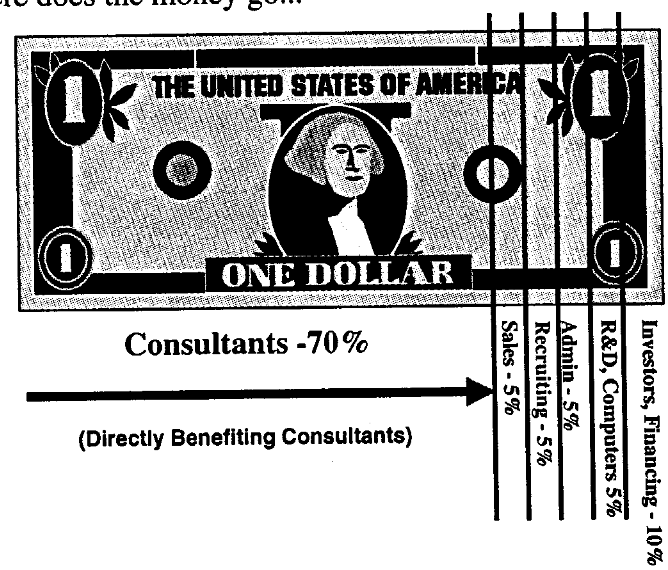
What This Means.....Cash Flow

- Outflow
  - Pay Salary Costs Every 2 Weeks
  - Pay all Other Costs Every Month
  - Carrying Costs to Cover During 65 Day Period
- Inflow
  - Collect 65 Days from invoicing(~95 days from when consultant paid)

Cash flow example

	Month							
	1	2	3	4	5	6	7	8
Hours Worked	160	160	170	150	155	170	160	150
Salary Cost	$(5,000)	$ (5,000)	$ (5,000)	$ (5,000)	$ (5,000)	$ (5,000)	$ (5,000)	$ (5,000)
Benefits	$ (500)	$ (500)	$ (500)	$ (500)	$ (500)	$ (500)	$ (500)	$ (500)
Taxes	$(1,000)	$ (1,000)	$ (1,000)	$ (1,000)	$ (1,000)	$ (1,000)	$ (1,000)	$ (1,000)
Invoice Sent		$ 12,000	$ 12,000	$ 12,750	$ 11,250	$11,625	$12,750	$12,000
Payment Received				$ 12,000	$ 12,000	$12,750	$11,250	$11,625
Cash Flow	**$(6,500)**	**$(13,000)**	**$(19,500)**	**$(14,000)**	**$ (8,500)**	**$ (2,250)**	**$ 2,500**	**$ 7,625**

Where does the money go...



How to be a Consultant

Not a Contractor

What Does Your Client Want?

What does Your Client Want?

- Client's want somebody who can propose and deliver customized, cost effective solutions to business problems
  - Requires understanding clients business
  - Commitment to adding value
  - Joining forces for client success
  - Proactive in managing your work flow

What Your Client Does Not Want!

- A person who borrows your watch and then charges you an exorbitant fee to tell what time it is.
- Temporary staff member who is to blame for all the blunders committed during their tenure with the firm.
- An outsider who is paid more than any permanent employee, has the best commute, gets all the good assignments, has the best benefits, is given the most training, and to whom the boss always listens.

Satisfying Clients

Satisfying Clients

- More than any other factor soft skills separate the consultant from the programmer. The best consultants possess excellent technical skills and have the best soft skills

IWIK I Wish I Knew

- Ability to Communicate H2 How To
  - IWIK, H2
- Good Interpersonal Skills
- Professional Appearance
  - Follow Dress Code
- Integrity, Objectivity, and Flexibility

Satisfying Clients

Satisfying Clients

- Soft Skills: Ability to Communicate
  - Good Listener
  - Articulate
  - Communicate at the Level of Your Listener
  - Effective Documentation and Writing
  - Participate Constructively/ Assertively in Meetings
  - Maintain the Thread of Meeting Agendas
  - Facilitation Skills ← Jim offered training
  - Solid Process Management
    - Brown Paper ← process flow taped to wall Wrapping paper, Butcher paper
    - PS/TB
    - Effective Meeting Skills

      3 steps Plan, Do, Review

PS/TB - Seven step process
Jim has 20 slides on this

Effective Meeting skills
Jim has training mat'ls.

Satisfying Clients

Satisfying Clients

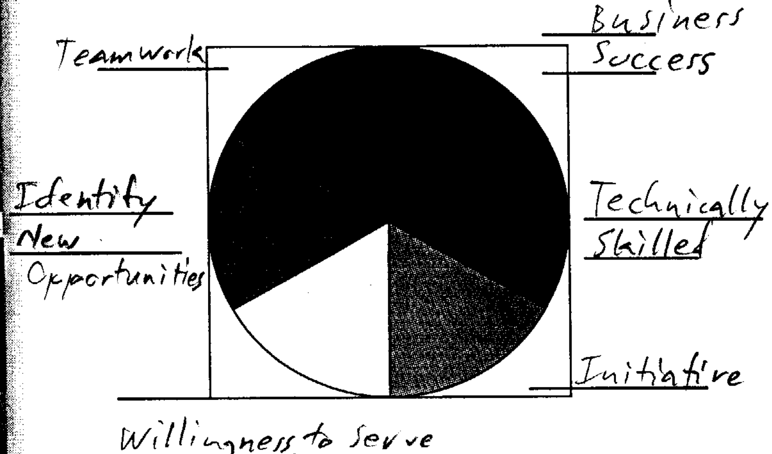
– Soft Skills: Good Interpersonal Skills
  - Treat others with respect and trust
  - Present concerns constructively
  - Build relationships with clients and team
  - Accept criticism non-defensively

"Going native right away"

Satisfying Clients

- Soft Skills
  - Ability to Communicate
  - Good Interpersonal Skills
  - Professional Appearance
  - Integrity, Objectivity and Flexibility

World Class Consultants



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1. Appearance
2. Demeanor
3. Knowledge
4. Integrity
5. Communication
6.

World Class Consultants

World Class Consultants

- Never forget you represent RJC.
- See profit and cash flow as necessary for RJC and personal continued livelihood.
- Protect RJC confidential info from other firms.
- See project from client management perspective. Understand their compelling event.
- Protect client's confidentiality and privacy from competition.
- Strong desire to succeed. Hate to lose.

Careers at Raymond James

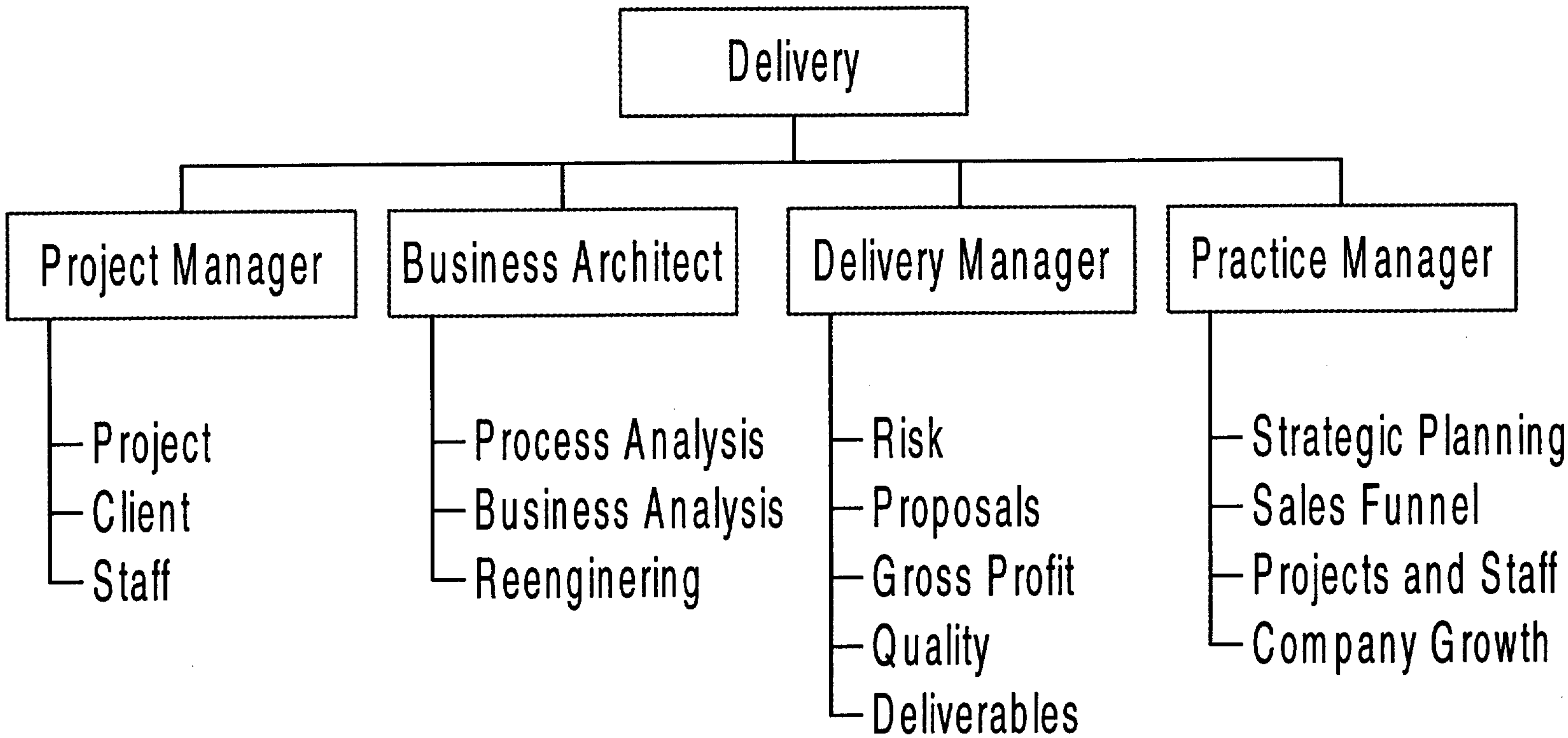
Growing Your Career

- Career Options
  - Technical
  - Delivery Management
  - People Management
- Growth Areas
- Career Truths

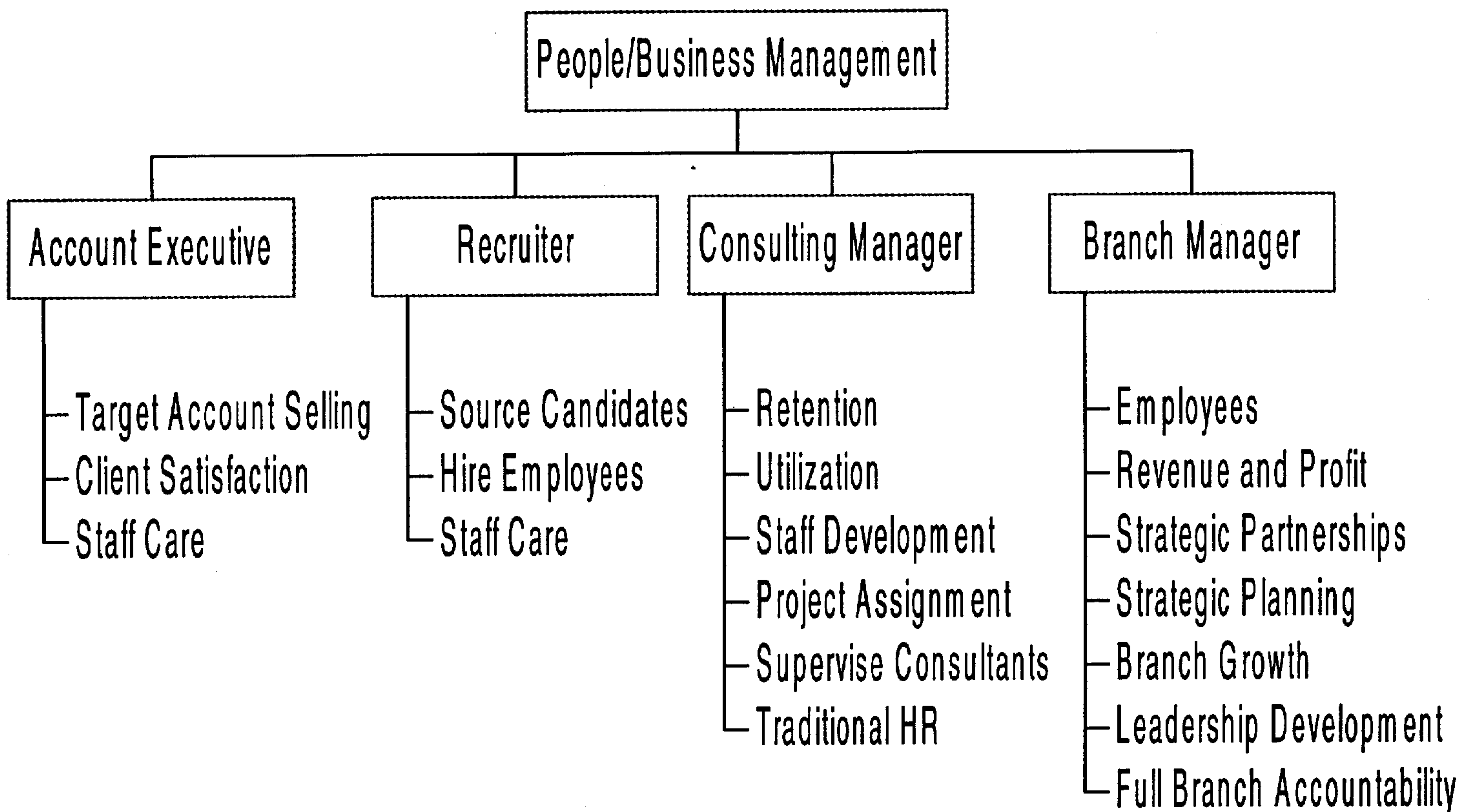
Technical Careers

- Technical Career Options
  - Consultant
    - Idea Need
    - Planning
    - Construction
    - Stabilzation
    - Consultant Expectations
  - Senior Consultant
    - Idea Need
    - Planning
    - Construction
    - Stabilzation
    - Strategic Planning
    - Proposals
    - Assist in Selling
    - Technical Expertise
    - Consultant Expectations
  - Product Specialist
    - Market Anticipation
    - Product Guru
    - Strategic Planning
  - Technical Architect
    - Technology Suite
    - Market Analysis
    - Strategic Planning
    - Integrated Solution Development

Delivery Management Careers



People Management Careers



Expectations for Consultants

Reporting Expectations

- Consultants Report to:
  - Managing Director of Consulting Services,
    - Heather Dunbar - 1st Line of Responsibility - Always
  - RJC Project Manager - by Project
  - Account Executive - by Client
  - Practice Manager
  - Client

Sales Expectations

- New Business Leads
- Infield Drilling
  - Seek Your Own Extension
  - Identify Key Influencers
  - Identify the Decision Maker-Political
  - Identify the Business Need-Compelling Event
  - Engaging the Account Executives-Partnering
  - Assist in Winning the Deal-Proposal, Communication
  - Understand Political Structure-Who is favorite

World Class Recruiting

World Class Recruiting

- Identifying Candidates
  - Good Technical Skills
  - Good Communication Skills
  - Good Attitude
  - Proactive
  - Understanding the Consulting Industry
  - Looking for the "better way"

World Class Consulting

- Interviewing
  - Accurate and Detailed Assessment
  - Assessment of Soft Skills
  - Probing Expectations of the Candidate

RJC

Solution Delivery

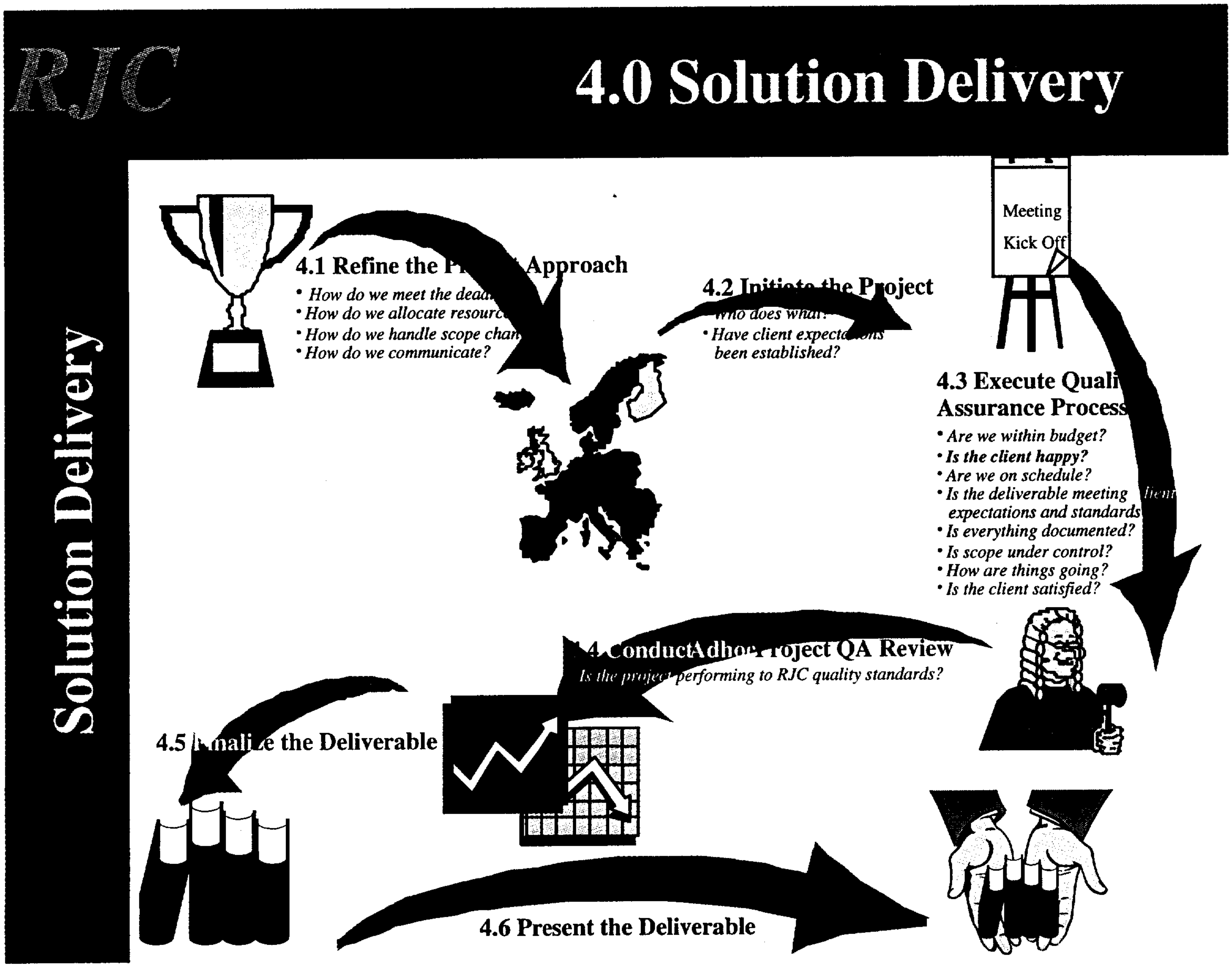
Raymond James
Quality-in-Service Series Course 2.2

Achieve!

The Raymond James Consulting
Proposal and Delivery Management Process

Module 4:
Solution Delivery

Raymond JAMES CONSULTING


RJC
4.0 Solution Delivery
Solution Delivery
4.1 Refine the P[...] Approach
• How do we meet the dea[...]
• How do we allocate resourc[...]
• How do we handle scope chan[...]
• How do we communicate?
4.2 Initiate the Project
• Who does what?
• Have client expectations been established?
Meeting
Kick Off
4.3 Execute Quali[...] Assurance Process
• Are we within budget?
• Is the client happy?
• Are we on schedule?
• Is the deliverable meeting expectations and standards?
• Is everything documented?
• Is scope under control?
• How are things going?
• Is the client satisfied?
4.4 Conduct Adhoc Project QA Review
Is the project performing to RJC quality standards?
4.5 Finalize the Deliverable
4.6 Present the Deliverable

Self Development Expectations

- Formal Training
- Vendor Training
- Internal RJC Training
- Self Training
- Developing and Driving Your Growth Plan
- Knowledge Transfer

Billing Expectations

40 Hours Per Week

Professionalism Expectations

- Attitude
- Appearance
- Courtesy
- Image
- Listening
- Follow Through

Professionalism: Attitude

- Excellence
- Service
- Integrity
- Personal Accountability
- Positive Thinking and Impact
-
-

Professionalism: Appearance

- Mon. thru Thur. - Business Professional; Fri. - Business Casual
  - Conservative Dress
  - Polished Shoes
  - Reasonable Jewelry
  - Good Hygiene
  - Laundered Clothes
  - Positive Attitude
  - Avoid Image Definers

Professionalism: Courtesy

- Client Team
- RJC Peers
- RJC Management
- RJC Support Staff
  - Payroll, Admin, Reception

Professionalism: Image

- Image is the most important attribute in sale of professional services
- Consultants must proactively manage RJC Image
- Image is a 3 dimensional composite:
  - Appearance
  - Attitudes
  - Behaviors
  - Competence
- Image is a market differentiator!

Rewards

Financial Rewards

Financial Rewards

- Base Compensation
- Overtime
- Employee Profit Share Bonus(Salary Employees Only)
- Incentive Plans
  - Certifications
  - Employee Referrals
  - New Client
  - Infield Drilling
  - Interviews
- Discretionary Bonuses

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Aug. 20th there will be an announcement on discretionary bonuses

Professional Rewards

- Training, Experience, Maturity
- Prof. Mentoring
- Leadership/Delivery/Business Acumen
- Opport. at a Growing Company

What Consultants Need to Know

What you Deserve to Know and
How to get Support

Need to Know: Interview

- Client's Industry
- Interview Players, Project Players
- Project/Position Specifics
- Organization
- Politics
- Discovery/Proposal Content
- The Compelling Event
- Time and Place
- Coaching

Need to Know: Engagement

- Duration of your Engagement
- Delivery Expectations
- Client Players
- RJC Players
- Who you Report to

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Is it time/materials or fixed cost
Work environment, logistics
Sensitivity issues

Need to Know: How to H2 Receive Support

- Client Problems - AE, Jim Alkire
- Heather Dunbar, Recruiter
- Technical - Project Manager, Practice Manager, Account Executive
- Personal - Heather Dunbar, Anybody (We all Care)
- Benefits - Vicki Goetz

Just Communicate!

Who to Communicate with at Your Client

Communicating/Relating at Your Client

- Client Report
- Decision Maker
- Financial Authority
- Who processes the bills
- Influencer(s)
- Politics

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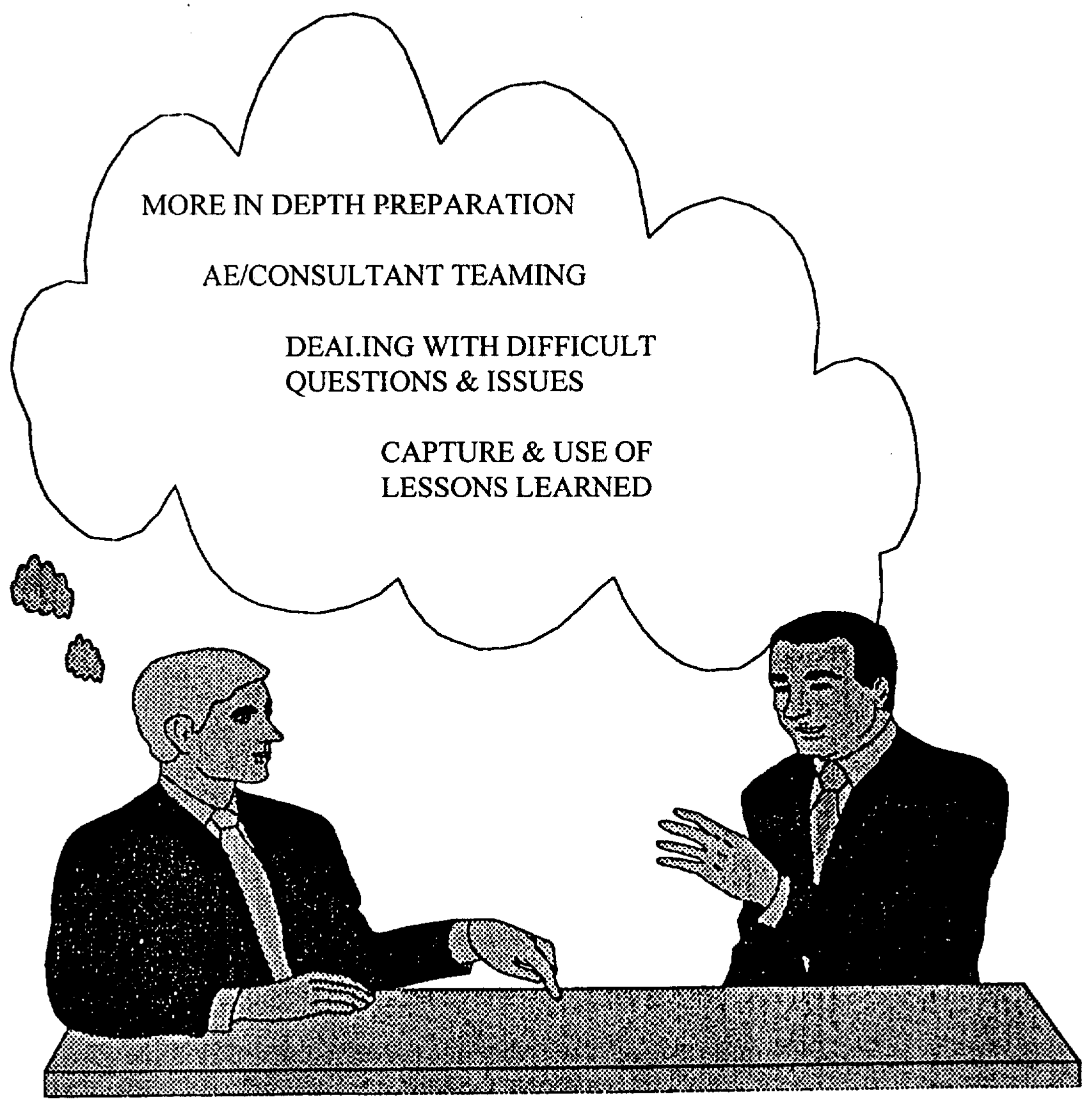
Closing

REASONS FOR INTERVIEWING FAILURES

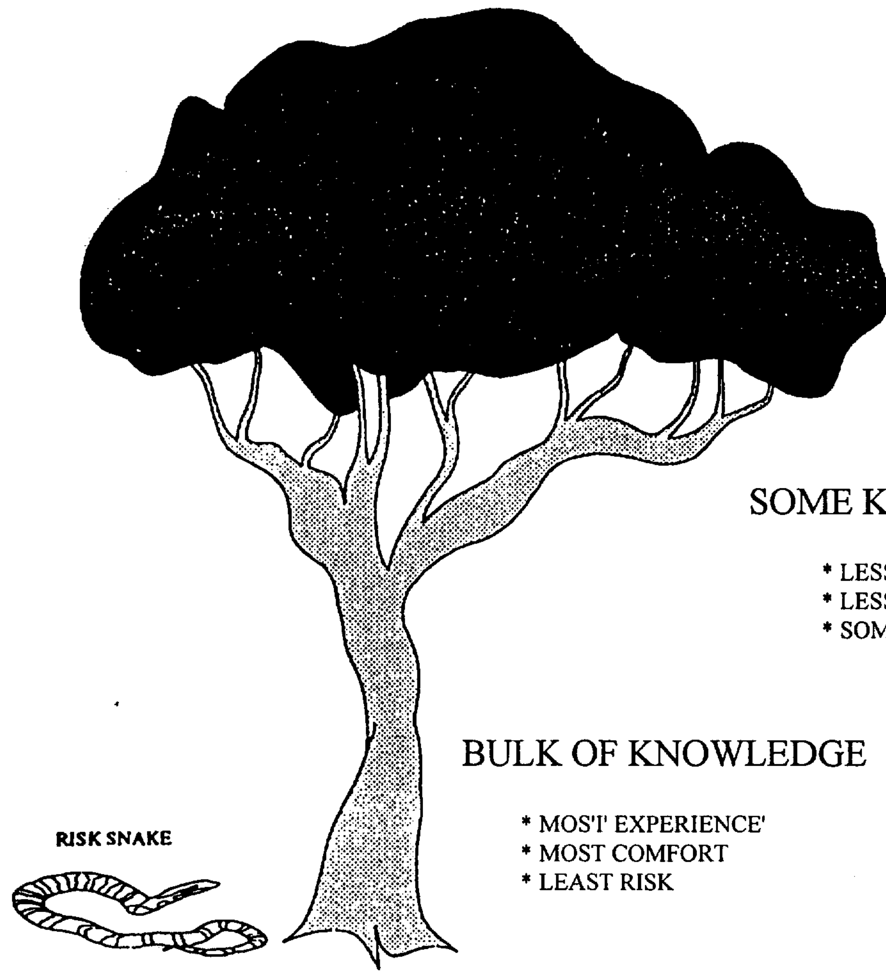
- LACK OF RJC PREPARATION
- LACK OF CONSULTANT PREPARATION

INTERVIEW PREPERATION

SO, WHAT'S NEW?



TREE OF KNOWLEDGE CONCEPT - INTERVIEWING



LEAST KNOWLEDGE

* LEAST EXPERIENCE
* LEAST COMIORT
* MOST RISK

SOME KNOWLEDGE

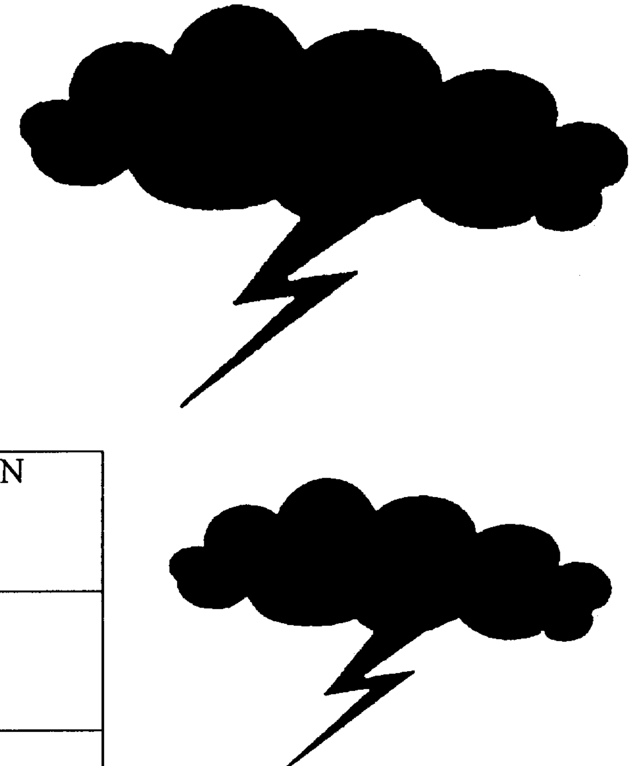
* LESS EXPERIENCE
* LESS COMFORT
* SOME RISK

BULK OF KNOWLEDGE

* MOS'T' EXPERIENCE'
* MOST COMFORT
* LEAST RISK

TOP 10 INTERVIEWING TURNOFFS

Thy Shall Not ...



1. LACK OF CLIENT INFO	6. POOR COMMUNICATION SKILLS
2. LACK OF KNOWLEDGE ABOUT CLIENT NEED	7. POOR APPEARANCE
3. LACK OF INTEREST	8. LACK OF TEAMWORK
4. POOR ATTITUDE	9. NO VALUE ADD TO CLIENT
5. POOR BEHAVIOR	10. LACK OF TECHNICIAL SKILLS

INTERVIEW PREPARA'IION

POOR ATTITUDES

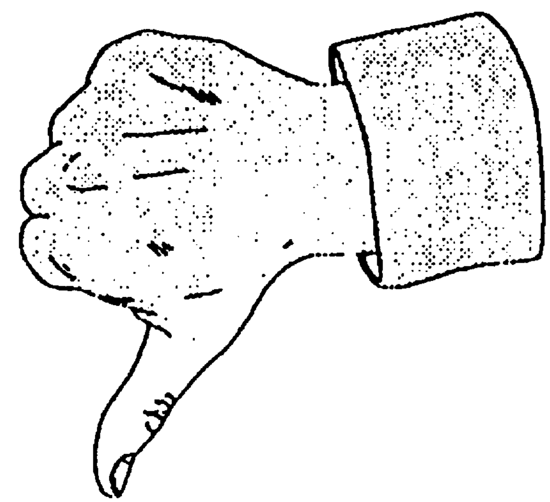
- ARROGANT
- HOSTILE
- UNENTHUSIASTIC
- NO POISE
- NOT PROFESSIONAL
- TOO PASSIVE
- CONDESCENDING
- INFLEXIBLE
- IMMATURE
- WHAT'S IN IT FOR ME?
- NEGATIVITY OR PESSIMISM

INTERVIEW PREPERATION

POOR BEHAVIOR

- UNPREPARED
- RUDE
- LACK OF SOCIAL SKILLS
- OVERLY TALKATIVE
- LOW ENERGY
- SMOKING
- GUM CHEWING
- DISCLOSING IMMORAL/ UNETHICAL BEHAVIORS

- LATE
- INAPPROPRIATE ATTIRE
- EVASIVE
- LOUD
- SHY
- DISTRACTED
- OVERLY FAMILIAR
- INSENSITIVE
- INCONSISTANT

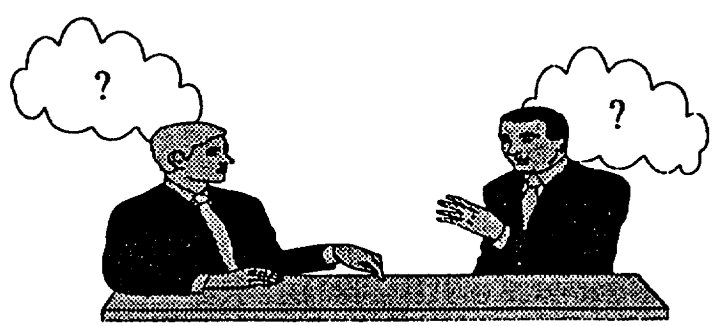


INTERVIEW PREPERATION

POOR COMMUNICATION SKILLS

- POOR ORAL/WRITTEN SKILL
- SLANG USAGE
- SHALLOW ANSWERS
- CANNED RESPONSES
- NOT UNDERSTANDING QUESTIONS
- CAN'T RELATE CLIENT
- CONCERN TO EXPERIENCE
- RAMBLING RESPONSES

- NOT LISTENING
- NONRESPONSIVE
- RESUME MISTAKES
- POOR CONVERSATIONALIST
- POOR EYE CONTACT
- OVER STATING QUALIFICATIONS
- POOR ENGLISH LANGUAGE SKILLS
- LACK OF CLIENT ORIENTED QUESTIONS



INTERVIEW PREPARATION

INTERVIEW DO'S

PRE-INTERVIEW

Dress professionally

Plan to arrive early

Include AE in interview

Quickly fill out paperwork given

DURING INTERVIEW

Develop professional rapport

Address everyone by first name

Have prepared presentation

Be able to answer questions

Use 'Tree of Knowledge' concept

Clarify questions

Avoid Impulsive answers

Ask relevant questions

Sell yourself

Know answers to questions about strengths and weaknesses

Take materials in hand from client when mentioned

CLOSING

Ask final questions

Outline main points

Express interest

Thank interviewer

Ask 2 or 3 good Questions

Offer helpful Suggestion, even if rejected

NOTE: Prepare flip charts from this

INTERVIEW PREPARATION

INTERVIEW DON'TS

PRE-INTERVIEW	DURING INTERVIEW	CLOSING
Interview If not experienced	Speak negatively	Feel discouraged
Lack knowledge about company	Indicate task Is below you	Let discouragement show, if rejected
Lack knowledge about client needs	Use acronyms or buzz words	
Lack interest	Become overly friendly	
Have poor attitude	If over lunch, don't drink	
Have poor behavior	Underqualify your experience	
Have poor communications skills	Lie	
Have poor appearance	Use long winded answers	
Lack team work/leadership skills	Use nervous habits	
Lack sense of value added nature	Lose eye contact	
Lack technical skills	Interrupt client when speaking	

NOTE: Prepare flip charts from this

INTERVIEW PREPARATION & FOLLOW-UP

TOOL	**PURPOSE**	**A (RACI)**	**R (RACI)**	**WHEN**	**STORE/ DISTRIBUTE**
Appearance Guidelines	Standard of Image and appearance	AE or MDCS	Consultant	Before each interview	Checklist
Pre-interview Checklist "Know your client"	Ensure preparation & understand customer	AE or MDCS	Consultant	Before each interview	Checklist
AE Pre-Interview Checklist	Ensure AE preparation for prep meeting with consulting	AE	AE & Consultant	Before each interview	Checklist
Consultant Pre-interview Checklist	Ensure consultant preparation for prep meeting with AE	AE or MDCS	Consultant & AE	Before each interview	Checklist
Interview Standards	Checklist for interview	AE or MDCS	Consultant	Before each interview	Checklist
Q&A Client * Consultant	Anticipate questions and prepose relevant answers and specific questions	AE or MDCS	Consultant	Before each interview	
Consultant Interviewing Script	A method for consultants to prepare how to present themselves	Consultant	Consultant	Each individual interview	AE-prior to interview MDCS-prior to interview
MDCS Post-interview Evaluation	Feedback to MDCS about consultants performance	AE	AE	After each interview	MDCS Store in consultant file
Post-interview follow-up	Capture debriefing and list next steps	AE	AE and/or Consultant	After each interview	AE Account Plan

CLIENT INTERVIEWING

CRITICAL PRINCIPLES

Client interviewing becomes a critical success factor by:

- ★ IMPROVING INTERVIEWING PREPARATION SKILLS
- ★ INCREASING INTERVIEW SUCCESS RATES
- ★ CREATING A MARKET DIFFERENTIATOR FROM OUR COMPETITION
- ★ REQUIRINGCONSULTANTANDAETOPURSUEATEAM EFFORT
- ★ CEMENTING CONSULTANT - AE RELATIONSHIP AS A TEAM
- ★ ENSURING QUALITY CONTROL IN THE PROCESS
- ★ PROVIDING LESSONS LEARNED TO IMPROVE AE, CONSULTANT, AND CGA ACTIVITIES

Example A

Interview Analysis

Interviewee: Developer Candidate

Interviewer: Bob Consultant

Interview Date:

Time: 8:30 pm

Location: Phone

Skills assessment:

Level	Guideline Description
0	No Experience
1 - 2	Novice / Training
3 - 4	Experienced but needs additional support
5 - 6	Experienced and can stand alone
7 - 8	Experienced and can support others
9 - 10	Expert/Mentor/Teacher

Summary Assessment

Skill \ Level	1	2	3	4	5	6	7	8	9	10
1								X		
2							X			
3						X				
4										
5										
6										
C1							X			
C2									X	
C3										
C4									X	

1)

Skill	Skill Level
Visual Basic	8

He has very well-rounded knowledge of the language. He has solid experience programming using most of the newer aspects of the language. His OO experience seemed particularly strong. He displayed solid coding techniques and good self-imposed standards throughout the interview. His weak areas within VB seemed to be knowledge of the Windows API and lack of experience using ADO. I'm not terribly concerned about either of these in this case as he seems to be a VERY fast learner. Extremely advanced developer considering the amount of time he's been coding professionally.

2)

Skill	Skill Level
COM/DCOM Development	7

He seemed very capable and experienced in developing COM components. While he has not implemented DCOM yet, he has done a lot of reading and has a solid understanding of the basic concepts.

3)

Skill	Skill Level
SQL Server	6

He has fairly strong SQL skills. His exposure has been limited due to his work environment. His weak spots are in more advanced SQL constructs and administration. He seemed very capable of designing databases, problem solving, writing queries, views, and stored procedures. Very limited exposure to triggers, but understands the concept well. One concern is that he has very limited experience with ERD diagrams.

4)

Skill	Skill Level

5)

Skill	Skill Level

6)

Skill	Skill Level

Example A

Consulting Assessment:

Date: ______

Interviewee: Developer Candidate

Interviewer: Bob Consultant

Level	Guideline Description
0	Quality not apparent
1 - 2	Limited , requires a lot of support
3 - 4	Below expectations but requires only some support
5 - 6	Average, occasional support
7 - 8	Good
9 - 10	Excellent, good example

C1

Area	Level
Ability to work with others	7
He was very cooperative and seemed easy to work with. Lean on current RJC Consultant for more info as he's worked with him in the past.	

C2

Area	Level
Communications	9
Good communication skills. He understood the concepts behind the technology and was capable of talking about them at a fairly deep level. Confident enough to voice an opinion without coming across too strong.	

C3

Area	Level
Professional Appearance	

C4

Area	Level
Ability to Learn	9
Very fast learner. He knows a lot about this stuff in a very short period of time and with limited real-world exposure.	

First Impressions: Sharp. Fast learner, stays on top of technology.

Comments: Very good potential to be a strong lead in a short time period.

Recommendations: Hire him!

Would You

Work with this person? Yes

Request a second technical? No

If Yes, in what areas ______

Example B

Interview Analysis

Interviewee: Infrastructure Candidate

Interviewer: Joe Consultant

Interview Date:

Time: 10:00 AM

Location: Phone

Skills assessment:

Level	Guideline Description
0	No Experience
1 - 2	Novice / Training
3 - 4	Experienced but needs additional support
5 - 6	Experienced and can stand alone
7 - 8	Experienced and can support others
9 - 10	Expert/Mentor/Teacher

Summary Assessment

Skill \ Level	1	2	3	4	5	6	7	8	9	10
1										
2										
3										
4										
5										
6										
C1										
C2										
C3										
C4										

	Skill	Skill Level
1)	Exchange Admin	9
	Comments: Very experienced with Exchange and interaction with other mail systems.	

	Skill	Skill Level
2)	Exchange Troubleshooting	8
	Comments: Real world experience	

	Skill	Skill Level
3)	NT Security	7
	Comments: Has good knowledge here. Would like to see some more experience	

	Skill	Skill Level
4)	Integration to other mail systems	6
	Comments: Has good experience, hopefully, we can expose him to more of this.	

	Skill	Skill Level
5)	Exchange Server monitoring	9
	Comments: Really understands the importance and takes this portion very seriously	

	Skill	Skill Level
6)	Overall Networking Knowledge	6
	Comments: Nick would like to expand and improve his skills in this area	

Example B

Consulting Assessment:

Date: ____________

Interviewee: Infrastructure Candidate

Interviewer: Joe Consultant

Level	Guideline Description
0	Quality not apparent
1 - 2	Limited , requires a lot of support
3 - 4	Below expectations but requires only some support
5 - 6	Average, occasional support
7 - 8	Good
9 - 10	Excellent, good example

C1

Area	Level
Ability to work with others	7
Comments: I think I could work with Nick	

C2

Area	Level
Communications	7
Comments: Gets his ideas across concisely	

C3

Area	Level
Professional Appearance	N/A
Comments:	

C4

Area	Level
Ability to Learn	8
Comments: Obviously learned Exchange and NT, would like to have him learn more about WAN Technologies.	

First Impressions:
Very knowledgeable in a key strategic area for this company.
Very affable and easy to get along with, I feel that we clicked right away.

Comments:
Ideal to lead implementation at Staffing, he would also get a taste of the WAN Experience that he desires

Recommendations:
Hire him ASAP!!!!!

Would You

Work with this person? Yes

Request a second technical? No

If Yes, in what areas ____________

Example C

Interview Analysis

Interviewee: Developer Candidate

Interviewer: Jane Consultant

Interview Date:

Time: 1:30p

Location: Phone

Skills assessment:

Level	Guideline Description
0	No Experience
1 - 2	Novice / Training
3 - 4	Experienced but needs additional support
5 - 6	Experienced and can stand alone
7 - 8	Experienced and can support others
9 - 10	Expert/Mentor/Teacher

Summary Assessment

Skill \ Level	1	2	3	4	5	6	7	8	9	10
1										
2										
3										
4										
5										
6										
C1										
C2										
C3										
C4										

1) Skill	Skill Level
Visual Basic	9
Comments: Lots of experience with Versions 3, 4, & 5. Understands 3-tier and object-oriented Development well. Experienced project technical leader and project management.	

2) Skill	Skill Level
Visual C++	5
Comments: Knows C++, but does not program on daily basis. Says he could brush up pretty Quick.	

3) Skill	Skill Level
SQL (Language Only)	10
Comments: Knows SQL well. Former IBM DB2 DBA. (He gets a 10 for IBM DB2)	

4) Skill	Skill Level
SQL Server (The product)	2
Comments: No experience with this product. However, he would not require much to get up to Speed as he knows Oracle and DB2 very well.	

5) Skill	Skill Level
Oracle	7
Comments: Lots of experience with as a developer, worked with DBA's in database design. Coded PL/SQL stored procedures, sounded proficient.	

6) Skill	Skill Level
Access	9
Comments: Very experienced in developing Access applications.	

Example C

Consulting Assessment:

Date: ____________________

Interviewee: Developer Candidate

Interviewer: Jane Consultant

Level	Guideline Description
0	Quality not apparent
1 - 2	Limited , requires a lot of support
3 - 4	Below expectations but requires only some support
5 - 6	Average, occasional support
7 - 8	Good
9 - 10	Excellent, good example

C1	Area	Level
	Ability to work with others	10
	Comments: Very experienced project technical lead and project manager. Very personable and Knowledgeable.	

C2	Area	Level
	Communications	10
	Comments: Excellent, very professional.	

C3	Area	Level
	Professional Appearance	N/A
	Comments: Phone Interview.	

C4	Area	Level
	Ability to Learn	10
	Comments: Very knowledgeable in several technologies, actively pursues certifications, books, Etc.	

First Impressions: Very professional, knowledgeable, and experienced consultant. Very personable as Well. He understands system architecture and the importance of good application Design.

Comments:

Recommendations: He would be an outstanding candidate for WBSI. Absolutely recommended for hire.

Would You

Work with this person? Yes

Request a second technical? No

If Yes, in what areas ____________________

Memorandum

To: RJC Dallas Salaried Consultants

From: Heather Dunbar

Date: 3/31/98

Re: Improvements in RJC's Bonus Program

In response to your feedback, Jim and I have been working to strengthen the RJC Employee Profit Share bonus program. We announced the new changes to the bonus calculation at the Open House in January – a lower hurdle rate and a higher percentage!

In preparation for the first quarter bonus checks that will go out next month, I wanted to send the new calculation to you in writing.

As a refresher, the RJC bonus program consists of two parts: a straight time overtime portion, and a profit sharing portion. The overtime portion is paid out as it is earned, on regularly scheduled payroll days. The company pays a consultant straight time overtime for all billable hours over 40 in any given week. Straight time overtime is calculated by taking your annual salary and dividing it by the regular number of paid hours in a year, which is 2080. The result is your hourly pay rate, or your straight time overtime rate. This portion of the bonus program is outlined in detail on page 17 of your employee handbook.

The second portion of the bonus program is the employee profit sharing bonus, which is paid out after the close of each quarter to those consultants who qualify. The new calculation became effective on 1/1/98, and is outlined below:

1. Employee Annual Salary / Possible billable hrs in a year = Employee Wage Cost per Hour
2. Employee Wage Cost per Hour * Possible billable hrs in quarter = Employee Wage Cost for Quarter
3. Employee Cost for Quarter * Company Cost&Profit Factor = Employee Target Revenue for EPS Bonus
4. Employee Billed Revenue – Employee Target Revenue = Employee Revenue Over Employee Revenue Target
5. Employee Revenue Over Employee Target * Profit Share Percentage = Employee PS Bonus for Quarter

Bonus up to 1400 qtr.

For example:

For a salary of $ 50,000 per year and a first quarter employee billed revenue of 40,000

2080	work hours in a calendar year
- 64	eight days of holiday hours (non billable hours)
2016	possible billable hours in a calendar year

168	Jan 98 billable hours
160	Feb 98 billable hours
160	Mar 98 billable hours
488	possible billable hours in first quarter (*using our accounting calendar months), OR the number of hours the employee billed during the quarter if higher than the minimum.

1. 50,000 / 2016 = 24.80 Employee Wage Cost per Hour
2. 24.80 * 488 = 12,102.40 Employee Wage Cost per Quarter
3. 12,102.40 * 2.35 = 28,440.64 Employee Target Revenue for EPS Bonus
4. 40,000 – 28,440.64 = 11,559.36 Employee Revenue Over Employee Revenue Target
5. 11,559.36 * .095 = 1,098.14 Employee Profit Sharing Bonus for 1st Quarter

The three changes we have made for this year are:

1) We removed vacation days from the equation of the employee's wage cost per hour, which lowers the target revenue (hurdle)
2) We reduced the Company Cost&Profit Factor from 2.375 to 2.35, which again lowers the hurdle for consultants to earn their EPS bonus portion.
3) We increased the Profit Share Percentage from 8.5% to 9.5%, which increases the employee's bonus

There are several strengths in the RJC bonus plan. First, the plan puts more control into the hands of the consultant on whether or not he will qualify for bonus! This has been accomplished through implementing the overtime portion of the bonus program. With just one hour of billable overtime, you are guaranteed to be earning a bonus. It kicks in immediately and is completely under your control. Everyone can participate, except on rare occasions when a client will not allow overtime. The overtime portion also makes a very significant part of your bonus completely independent of the bill rate of your current assignment, which is an area out of the control of the consultant.

Secondly, due to RJC's great sales force, our utilization rate was very strong over the last year, which dramatically increases your opportunity to qualify for the employee profit sharing portion of the bonus program. With a sales team of 5, RJC Dallas has won longer term assignments which have contributed to this improvement. RJC Dallas has also achieved less down time between assignments, which increases the revenue you bill and therefore increases your opportunity to earn a bonus and your bonus amount.

Thirdly, RJC Dallas has an average billing rate from $85/hr to $90/hr and continues to increase its effective billing rate. We have improved the effective billing rate through a more accurate bidding process and through managing change control to avoid project write offs. These higher rates also allow you to bill more revenue and earn a much higher, much more consistent employee profit sharing bonus.

It is our desire to reward the RJC Dallas team of consultants for their tremendous expertise and hard work. You are accomplishing some tremendous successes out there and you deserve a great bonus program! Thank you!

RJC Dallas Bonus Program for

Internet Systems Credential for Product Specialists

RJC actively encourages the development of our Internet consultants. Our bonus program for the **Internet Systems Credential for Product Specialists** is as follows:

Three Exams Required		
70-067	Implementing and Supporting Windows NT Server 4.0	$250
70-087	Implementing and Supporting Microsoft Internet Information Server 4.0	$250
70-059	Internetworking Microsoft TCP/IP on Microsoft Windows NT 4.0	$250

There is an additional $200 completion bonus, bringing the total bonus to $950, that is awarded after the consultant passes the third exam toward this certification.

Note: This certification plan is a subset of the MCSE track. If a consultant is primarily in the Internet or Client/Server practice, their bonus is just as described. If a consultant is primarily in the Infrastructure practice, the existing MCSE bonus program already rewards them for these exams. Therefore, an infrastructure consultant will not be bonused additionally for this Internet Credential.

*This policy was last amended 03/09/98. It will remain in effect until 7/1/98. RJC, however, reserves the right to amend or cancel this bonus program with a two week notice to the employees of the firm.

*This policy applies to both salaried and hourly employees.

Raymond James Consultants Dallas

MCSD Certification Bonus Program

RJC actively encourages the development of our Client/Server consultants. Our bonus program for the Microsoft Certified Developer certifications provides incentive to complete the track. Due to the current market, it also encourages consultants to focus their expertise in the Visual Basic/SQL direction.

MCSD Requirements

Microsoft Certified Solution Developers are required to pass two core technology exams and two elective exams that provide a valid and reliable measure of technical proficiency and expertise. The core technology exams require candidates to prove their understanding of Windows® 32-bit architecture, OLE, UI design, and Windows Open Services Architecture components. The elective exams require proof of expertise with Microsoft development tools. The requirements that are selected for bonus are outlined in the following table.

MCSD Core Technology Requirements (two exams required)

70-160	**Microsoft® Windows® Architecture I** (Must be passed by Aug 31, 1998 to retain MCSD Certification)	$350
70-161	**Microsoft® Windows® Architecture II** (Must be passed by Aug 31, 1998 to retain MCSD Certification)	$350

MCSD Electives (two exams required)

70-027	Implementing a Database Design on Microsoft® SQL Server™ 6.5	$350
70-024	Developing Applications with C++ Using the Microsoft® Foundation Class Library	$300
70-165	Developing Applications with Microsoft® Visual Basic® 5.0	$350
70-025	Implementing OLE in Microsoft Foundation Class Applications	$200

As of 6/20/97

If you have not passed any tests toward the MCSD at the release of this bonus plan, then the above applies to you just as written. Your total bonus will range anywhere from $600 to $1400 depending on which tests you choose to take.

If you have already passed some tests, but not all, toward a valid MCSD **while you have been at RJC**, then you will be bonused on your remaining tests as listed above. As well, at the completion of your MCSD, we will bonus you for your previously passed tests at the rate listed in the table above, or at the rate of $100 for Access 2.0, Access 97 and VB 3.0.

If you have already passed some tests, but not all, toward a valid MCSD **before your employment at RJC**, then you will be bonused on your remaining tests as listed above. You will not receive any bonus for tests passed prior to coming to RJC.

If you have already earned your MCSD, and want to update your certification with the more recent technologies, then we will bonus you $200 for every test you pass that upgrades your certification. For example, if you passed the WOSA I test in achieving your MCSD, then if you pass the Windows Architecture I test, RJC will bonus you $200.

If you have already earned your MCSD, and want to pass tests in a different elective to broaden your technology base, then you will receive the individual bonus amount for that test.

This program is very important to RJC because it strongly enhances our credibility with new prospective customers and increases our billing rates. It is also important to consultants because it increases their earning potential both through the certification bonus and the Employee Profit Sharing Bonus.

*This bonus program was last amended 03/09/98. It will remain in effect until 7/1/98. RJC, however, reserves the right to amend or cancel this bonus program with a two-week notice to the employees of the firm.

*This program applies to any salary or hourly employee at RJC that bills time for technical services rendered to our clients.

Raymond James Consulting Dallas

MCSE Certification Bonus Program

RJC actively encourages the development of our Infrastructure consultants. Our bonus program for the **Microsoft Certified Systems Engineer** certification provides a huge incentive to complete the tract. Raymond James encourages consultants to take the NT 4.0 tract, as this area is the segment of business we are pursuing.

The bonus program has three parts:

1. The first is the **base bonus** for each exam. It is paid to any consultant who has not yet earned his or her MCSE and passes that particular exam.
2. The second part is a **special bonus** RJC is offering for a limited time. The first two consultants to pass the exams for which this is offered will be paid the additional, special bonus amount. These are designed to give RJC official credentials in specified areas. They can be earned by any consultant, even if the consultant has already received the MSCE certification.
3. The third portion of the plan is the **accelerator bonus**. It is designed to encourage consultants to complete their MCSE certification by passing the 6 required exams. Each time a consultant passes an exam needed for their MCSE, he or she is paid the appropriate accelerator amount listed below.

The tract and bonus structure is as follows:

Section 1 (4 O/S Exams Required)		**Base**	**Special**	**Carrots Used**
70-067	Implementing and Supporting NT Server 4.0	$250		
70-068	Implementing and Supporting NT Server 4.0 in the Enterprise	$250		
70-064	Implementing and Supporting Windows 95	$250	$200	Welch,Borden
70-073	Implementing and Supporting NT 4.0 Workstation	$250	$200	Maiorelle, Wimberly
70-098	Implementing and Supporting Windows 98	$250		
70-058	Networking Essentials	$250		

Section 2 (2 Electives Required)		Base	Special	Carrots Used
70-085	MS SNA Server 4.0	$250		
	Implementing and Supporting System Management Server 1.X	$250	$300	Tolentino
70-086	Implementing and Supporting System Management Server 2.0	$250		
70-026	System Administration for SQL Server 6.5	$100	$100	Cox
70-028	System Administration for SQL Server 7.0	$250		
70-027	Implementing a Database Design on SQL Server 6.5	$100		
70-029	Implementing a Database Design on SQL Sever 7.0	$250		
70-059	Internetworking MS TCP/IP on NT 4.0	$250		
70-076	Implementing and Supporting Exchange Server 5.0	$200		
70-081	Implementing and Supporting Exchange 5.5	$250		
70-087	Implementing and Supporting Internet Information Server 4.0	$250	$200	
70-088	Implementing and Supporting Proxy Server 2.0	$250		
70-079	Implementing and Supporting MS Internet Explorer 4.0 by using the Explorer Administration Kit	$100		

The following table represents the certification accelerators:

Exam Passed	Accelerator
1	$0
2	$25
3	$50
4	$75
5	$125
6	$225
Total	**$600**

Note: RJC no longer pays bonus to a consultant for passing any of the older versions of the MCSE exams, even though Microsoft still counts those versions toward an MCSE certification. That is to encourage our consultants to pursue the latest technologies. If, however, a consultant "upgrades" his/her previously passed, older version MCSE exam by passing a newer version, then RJC will pay a **base bonus** of $125, plus any **special bonus** available for that exam. The **accelerator bonus** would not apply because passing the newer version does not move you any closer to completing the MCSE certification.

This program is very important to RJC because it strongly enhances our credibility with new prospective customers and increases our billing rates. It is also important to consultants because it increases their earning potential both through the certification bonus and the Employee Profit Sharing bonus.

*This policy was last amended 03/25/98. It will remain in effect until 7/1/98. RJC, however, reserves the right to amend or cancel this bonus program with a two week notice to the employees of the firm.

*This policy applies to both salaried and hourly employees.

RJC Dallas Employee Referral Bonus Plan

Employee Bonus for Full Time Salary or Full Time Hourly Referral:

RJC will pay a $1,000 bonus to any consultant that refers a person to our firm if that person is hired as a full time salaried or hourly employee. Half of the bonus ($500) will be paid when the employee starts, and the remaining half will be paid after the new hire has been here for 90 days. If the hire referral leaves RJC within the first 6 months, a pro-rated (by month) portion may be deducted from your <u>next</u> referral Bonus.

Employee Bonus for Contract or other Referral:

RJC may pay a discretionary bonus (maximum $500) to any consultant that refers a person to our firm if that person is hired as a contract, or similar, employee. The bonus may be paid out in installments, or in full, at RJC's discretion. The amount of the bonus will depend, in part, on the length of project for which they are hired and the length of time the employee maintains their contractual relationship with RJC.

*This policy was last amended 3/25/98. It will remain in effect until 7/1/98. RJC, however, reserves the right to amend or cancel this bonus program with a two-week notice to the employees of the firm.

*Members of the RJC Executive Leadership Team do not qualify for the employee referral bonus program. Only RJC consultants (both salaried and hourly) qualify.

RJC Dallas New Client Bonus Plan

RJC desires consultant involvement in attracting new, top quality clients. Therefore, the company will bonus any salaried or hourly consultant for every qualifying client that the consultant identifies. The bonus will be $250 for every $10,000 of services provided by Raymond James, up to a maximum bonus of $1,000 for that lead. A qualifying client is:

- A client that has an annual revenue of $125,000,000 and
- A client that RJC has not billed in the past three months.

To present a prospect for consideration, the consultant must first send the lead to the General Manager. This can be done in one of several ways: in a face to face meeting, via telephone, or via email at jim.alkire@rjconsult.com. The General Manager will follow up with the consultant before any calls are made on your identified prospect. The consultant's role may vary from simply identifying the lead to being involved all throughout the sales process.

*This policy was last amended 03/09/98. It will remain in effect until 7/1/98. RJC, however, reserves the right to amend or cancel this bonus program with a two-week notice to the employees of the firm.

*Members of the RJC Executive Leadership Team do not qualify for the new business bonus. Only RJC consultants (both hourly and salary) qualify.

RJC Dallas Infield Drilling Bonus

RJC is now offering a bonus for consultants that generate new business with an existing client. The bonus will be $250 for every $10,000 of services provided by Raymond James, up to a maximum bonus of $1,500 for that lead. A qualifying lead at an existing client is any new business that the Account Executive has never discussed with the client.

The method for presenting a lead at an existing client is to contact the General Manager directly with the pertinent information (client, contact, phone number and business identified). The General Manager will then determine the best way for RJC to close that business. The consultant's role may vary from simply identifying the lead to being involved all throughout the sales process.

The bonus increments will be paid out on the first possible payroll after each $10,000 is billed to the client.

*The effective date for this policy is 3/25/98. It will remain in effect indefinitely. However, RJC reserves the right to amend or cancel this bonus program with a two-week notice to the employees of the firm.

*Members of the RJC Executive Leadership Team do not qualify for the new business bonus. Only RJC consultants (both hourly and salary) qualify.

Initial Plan

Opportunity Assessment

ACCOUNT/LOCATION		SALES OPPORTUNITY
		SALESPERSON
		COMPETITOR(S)
ORDER AMOUNT	CLOSE DATE	SOLUTION PROPOSED

Write in the date and assess your position using + or –. If you don't know, put a question mark. Assess your competitor's position. Repeat at critical points in the sales campaign.

				DATE: OUR CO.	COMPETITORS			DATE: OUR CO.	COMPETITORS			DATE: OUR CO.	COMPETITORS		
	IS THERE AN OPPORTUNITY?														
1	CUSTOMER'S APPLICATION OR PROJECT	DEFINED	+												
		UNDEFINED	–												
2	CUSTOMER'S BUSINESS PROFILE	STRONG	+												
		WEAK	–												
3	CUSTOMER'S FINANCIAL CONDITION	STRONG	+												
		WEAK	–												
4	ACCESS TO FUNDS	YES	+												
		NO	–												
5	COMPELLING EVENT	DEFINED	+												
		UNDEFINED	–												
	CAN WE COMPETE?														
6	FORMAL DECISION CRITERIA	DEFINED	+												
		UNDEFINED	–												
7	SOLUTION FIT	GOOD	+												
		POOR	–												
8	SALES RESOURCE REQUIREMENTS	LOW	+												
		HIGH	–												
9	CURRENT RELATIONSHIP	STRONG	+												
		WEAK	–												
10	UNIQUE BUSINESS VALUE	STRONG	+												
		WEAK	–												
	CAN WE WIN?														
11	INSIDE SUPPORT	STRONG	+												
		WEAK	–												
12	EXECUTIVE CREDIBILITY	STRONG	+												
		WEAK	–												
13	CULTURAL COMPATIBILITY	GOOD	+												
		POOR	–												
14	INFORMAL DECISION CRITERIA	DEFINED	+												
		UNDEFINED	–												
15	POLITICAL ALIGNMENT	STRONG	+												
		WEAK	–												
	IS IT WORTH WINNING?														
16	SHORT-TERM REVENUE	HIGH	+												
		LOW	–												
17	FUTURE REVENUE	HIGH	+												
		LOW	–												
18	PROFITABILITY	HIGH	+												
		LOW	–												
19	DEGREE OF RISK	LOW	+												
		HIGH	–												
20	STRATEGIC VALUE	YES	+												
		NO	–												

Initial Plan

Customer's Project or Application	Customer's Compelling Event - Consequences/Payback
Our Unique Business Value	**Milestones in the Buying Process**
Our Formal Sales Strategy	**With whom are you aligned?**

Tactics

Prime Tactics

- **P**rove your value
- **R**etrieve missing information
- **I**nsulate against competition
- **M**inimize your weaknesses
- **E**mphasize your strengths

Action	Resources Required	Responsibility	Timing

ACCOUNT EXECUTIVE PRE-INTERVIEW CHECKLIST

PURPOSE

The purpose of the checklist is to provide a structured map of issues, questions and activities that must be considered, researched and answered prior to a preparation interview with the consultant for a client interview. This will ensure comprehensive interview preparation, and minimize interview failures.

RESPONSIBILITY

The Account Executive (AE) is accountable for using the checklist in conjunction with the consultant.

FREQUENCY

This checklist must be reviewed in preparation for all planned interviews.

DISTRIBUTION

The checklist is not a form, and therefore is merely kept on file for use by the AE or the Managing Director of Consulting Services (MDCS).

AE PRE-INTERVIEW CHECKLIST

1. Provide detail of the project, its objectives, position's responsibilities, how they relate to project, technical and non-technical skills for the engagement.

2. Describe client's business and work environment.

3. Check with other consultants who have worked at the client.

4. Provide name, status and location of interviewer; include likes and dislikes.

5. Discuss with the consultant why the engagement is important in the overall account strategy.

6. Inform consultant of specific things NOT to say to the client.

7. Be sure consultant has a good grasp of the business, industry and application essentials for the engagement

8. Discuss client "hot buttons" (ex. client hates vague discussions).

9. Discuss possible client objections to the particular consultant with the consultant and how to handle them.

10. Be sure consultant has a developed script for dealing with both their own strengths and weaknesses.

11. Determine pre-interview steps for consultant to close any knowledge gaps for the engagement.

12. Provide post-interview instructions for debriefing:

    - Whether AE will be at the interview
    - If not, where AE will be after the interview
    - If not, how to contact AE after the interview
    - What information the consultant should listen for during the interview
    - Record client concerns and questions
    - List items requiring follow-up and action to be taken
    - Provide feedback form (see Post-Interview Follow-up)

CONSULTANT PRE-INTERVIEW CHECKLIST

PURPOSE

The purpose of the checklist is to provide a structured map of issues, questions and activities that must be considered, researched and answered prior to a preparation inter-view with the AE and/or MDCS for a client inter-view. This will ensure comprehensive interview preparation, minimizing interview failures.

RESPONSIBILITY

The Consultant is responsible for using the checklist in conjunction with their AE and MDCS. The AE is accountable for providing the checklist to the consultant.

FREQUENCY

This checklist must be reviewed in preparation for all planned interviews.

DISTRIBUTION

The checklist is not a form, and therefore is merely kept on file for use by the AE or MDCS.

CONSULTANT PRE-INTERVIEW CHECKLIST

ORGANIZATIONAL

1. With whom am I going to interview?
   What are their titles?
   Are they easy or hard interviewers?
   Do you know types of questions they will ask?
2. Have criteria been established for client satisfaction and enthusiasm?
3. For whom will I be working?
4. What is the client's organizational structure? Can I have a copy of it?
5. Do we have an annual report of the client that I can review or other information pertaining to the client?
6. What is the client's business problem?

TECHNICAL

7. Is my resume accurate--? Review it!
8. What type of work will I be doing? What are my responsibilities?
   What is my role on the project?
9. Hardware configuration? Operating system?
10. Text editor?
    Software languages used?
11. What development aids/tools are available?

ENVIRONMENTAL

12. What is the history of our involvement with the client?
    Has RJC worked for the client recently?
13. What is the working environment?
14. What type of office, cubicle, etc. will be made available to me?
15. In what stage is the project?
16. Will I be by myself on the engagement?
    What other RJC people are on the account?
    Are they on different projects or the same project?
    Are all people in the same or different buildings?
    Can I have a list of other consultants on site?
    Will you introduce them to me?
17. How long of an engagement is it?
    Might it extend?

18. Are other competitors engaged at the client site?
19. What is the appropriate dress code?

LOGISTICAL

20. Is there travel involved with the assignment?
21. Where is the client located; any special logistics?
22. How many hours can I expect to work each week?
    Is it fixed at 40 or can I expect some or much overtime?
23. Does the client observe flex time or do they have fixed consultant business hours?
24. What is the client's address and telephone number?

MISCELLANEOUS

CONSULTANT PRE-INTERVIEW CHECKLIST

ACTIVITY

1. Meet with AE, review all information available.

2. Review client proposal and your resume. Update resume as needed.

3. Be able to explain client business problem in business terms.

4. Be able to explain client industry issues and concerns.

5. Be able to outline client application.

6. Review prior RJC experiences with client: (good, none, bad).

7. Meet or talk with RJC employees from client site (past or present); discuss client, system.

8. Review client technical environment.

9. Review your most complex project experience similar to the client's. Note the similarities, this is your story.

10. Review any other related experience or application.

II. Review the chronology of your <u>RELEVANT</u> work experience.

12. Write a list of your weaknesses and develop a statement turning them into positives.

13. List three questions you hope the client does <u>NOT</u> ask you and develop answers dealing with them.

14. Be able to write a script of the above items (see APPENDIX - Consultant Interviewing Script).

CONSULTANT INTERVIEWING SCRIPT

PURPOSE

The Consultant Interviewing Script provides a method for the consultant to distill their thoughts on how to present themselves to the client in an interview. This represents the consultants story geared to a specific opportunity/engagement

RESPONSIBILITY

The consultant is accountable for ensuring that the script is completed and internalized.

FREQUENCY

The script must be developed for each individual interview planned for the consultant.

DISTRIBUTION

The script is circulated to the Account Executive and the Managing Director of Consulting Services for comment and confirmation. The script should be saved by the AE along with the Post Interview Follow-up form.

CONSULTANT INTERVIEWING SCRIPT

Proper interview preparation

1. DETAIL YOUR SKILLS AS THEY RELATE TO THE ASSIGNMENT:

2. LIST PAST PROJECTS AND DETAIL HOW THEY RELATE TO THE ASSIGNMENT:

3. LIST YOUR STRENGTHS, APPLICATION EXPEREENCE AND RELATE THEM TO THE ASSIGNMENT:

4. LIST YOUR WEAKNESSES AND DEVELOP STATEMENTS WHICH CAN BE USED IN THE INTERVIEW TO TURN THEM INTO POSITIVES:

5. LIST KEY TOPICS, BUSINESS ISSUES, RELATED SYSTEMS AND TERMINOLOGY RELATED TO THE ASSIGNMENT:

CONSULTANT INTERVIEWING SCRIPT

Proper Interview Preparation	
DETAIL YOUR SKILLS AS THEY RELATE TO THE ASSIGNMENT.	Focus on <u>only</u> those relevant to the opportunity
LIST PAST PROJECTS AND DETAIL HOW THEY RELATE TO THE ASSIGNMENT.	Focus on most relevant projects similar to opportunity - Scope - Technologies - Methodologies - Responsibilities
LIST YOUR STRENGTHS, APPLICATION EXPERIENCE AND RELATE THEM TO THE ASSIGNMENT.	Refer to Question & Answer check lists, Do's & Don'ts checklists. - Focus on what is relevant - Do not provide detail histories
LIST YOUR WEAKNESSES AND DEVELOP STATEMENTS WHICH CAN BE USED IN THE INTERVIEW TO TURN THENM INTO POSSITIVES.	Refer to Do's Don'ts; Question & Answer checklist: - Be prepared! - Be your own worst critic - Be constructive, creative - Don't lie!
LIST KEY TOPICS BUSINESS RELATED SYSTEMS AND TERMINOLOGY RELATED TO THE ASSIGNMENT.	Review opportunity materials for assignment: - Business issues being addressed - Topics of business interest - What systems support or depend on this assignment - Acronyms & jargon

SAMPLE

CONSULTANT INTERVIEWING SCRIPT

Proper Interview Preparation

1. **DETAIL YOUR SKILLS AS THEY RELATE TO THE ASSIGNMENT:**

    - 7 years of analysis & design with hierarchical/relational databases.
    - PC environment specialist.
    - VB 5.0, Access - 3 years experience.
    - LAN installation, maintenance administration.

2. **LIST PAST PROJECTS AND DETAIIL HOW THEY RELATE TO THE ASSIGNMENT:**

    - Designed/developed inventory management system on a PC-LAN using Visual Basic: System components and base language the same.
    - Designed/developed consumer product information system on a PC-LAN, trained client, documented systems & procedures.

3. **LIST YOUR STRENGTHS, APPLICATION EXPEREENCE AND RELATE THEM TO THE ASSIGNMENT:**

    - Strengths are: PC-LAN/SME with correct language, analysis, design profile.
    - Highly analytical, good communicator, user interface.

4. **LIST YOUR WEAKNESSES AND DEVELOP STATEMENTS WHICH CAN BE USED IN THE INTERVIEW TO TURN THEM INTO POSITIVES:**

    - Light on Access, but experienced in 2 similar languages.
    - Light on electronic mail systems, reviewing AT&T e-mail documentation to become literate, will meet with other consultant for tutoring. Have experience with file transfer to other text editors.

5. **LIST KEY TOPICS, BUSINESS ISSUES, RELATED SYSTEMS AND TERMNOLOGY RELATED TO THE ASSIGNMENT:**

    - Responsiveness and accessibility of user information with critical response times. Product information, database design, user friendly design of outputs with consumer orientation.

CONSULTANT PRE-INTERVIEW CHECKLIST

Know the Client

PURPOSE

The purpose of the checklist is to provide a list of client information that should be researched and answered prior to a preparation interview with the AE and/or MDCS for a client interview. This will ensure comprehensive interview preparation, minimizing interview failures.

RESPONSIBILITY

The Consultant is responsible for using the checklist in conjunction with their AE and MDCS. The AE or MDCS is accountable for providing the checklist to the consultant.

FREQUENCY

This checklist must be reviewed in preparation for all planned interviews.

DISTRIBUTION

The checklist is not a form, and therefore is merely kept on file for use by the AE or MDCS.

INTERVIEW PREPARATION CHECKLIST

Know the Client

POSITION
General knowledge - overview:
- Job description and responsibilities
- Location, reporting names and titles

COMPANY
Company history, industry and type of business:
- Products & services
- Headquarters and business units
- Financials (sales/profits)
- Size, number of employees
- Organization structure, parent company, relationship
- Corporate culture/philosophy, management style
- Market niche/share of market
- Current conditions/events
- Organizational goals/future plans
- Clientele/customer base
- Leading edge projects/R&D
- Public/Privately held
- Beyond the marketing/advertised image

INDUSTRY
Understand the industry:
- Rank/industry status
- Competitors

***THE IDEAL SITUATION** - You have the best chances if:*
* You have advance knowledge of the interview
* You have the inside "scoop" on the client
* The client requirements are well defined
* There are other RJC consultants at the client site
* You have the technical skills required and/or experience in the client's business
* You know how to appropriately follow-up after the interview

ALL OF THESE ARE UNDER OUR CONTROL!! BUT BE FLEXIBLE, WE LIVE IN THE REAL WORLD!!!

CONSULTANT APPEARANCE GUIDELINES

PURPOSE

The purpose of the guidelines is to provide a minimum standard for appearance and image of the consultant. Any consultant who has been advised on this matter to consider the issue must review this.

RESPONSIBILITY

The Consultant is responsible for using the guideline in conjunction with their AE and MDCS.

FREQUENCY

The guidelines must be reviewed prior to all interviews.

DISTRIBUTION

The checklist is not a form, and therefore is merely kept on file for use by the AE or MDCS.

CONSULTANT APPEARNACE GUIDELINES

GENERAL

1. Conservative and coordinated dress
2. Polished shoes
3. Reasonable jewelry
4. Combed, neat hair
5. Good hygiene (hair, nails, etc.)
6. Laundered clothes
7. Positive attitude, confident look
8. Walk with a medium stride, standing tall and with a purpose
9. Avoid image definers that affect perceptions such as pocket protectors, insignias, etc.

SPECIFIC

WOMEN

- Appropriate dress length
- Sensible heel height
- Undecorated hose
- Appropriate neckline
- Minimum perfume

MEN

- Appropriate tie for suit
- Dark, matching socks
- Minimum cologne or after shave
- Suit, no sport jacket
- No dark shirts

NOTE: THE AE WILL ASK YOU TO MAKE ADJUSTMENTS AS NEEDED PRIOR TO THE INTERVIEW.

CLOSING THE INTERVIEW

CLOSING

1. Ask any final questions.

2. Outline the main points you discussed.

3. If you are interested in the position and the engagement, ask for it. Express your interest.

   EXAMPLE: "I am interested in this position and look forward to working with you on the assignment.

   If the position is offered to you, accept it on the spot. If there is a need to consider this decision, be courteous and tactful about asking for time to consider it (not more than 48 hours.) Set a date with the client to provide an answer. Work out this contingency with the AE before the interview. Some reasons may be:
   - Personal logistics (travel, childcare, etc.)
   - Some grave doubts about what the assignment is really about
   - Serious personal reservations about the client/engagement.

4. Don't be discouraged if the offer is not forthcoming. There may be client paperwork, communication issues, or other interviewing yet to be done.

5. If you have the impression that the interview did not go well and you have been rejected, don't let your discouragement show. Sometimes a client will test your reaction to disappointment. In any case, how you exit can leave a positive, professional impression. Offer helpful professional suggestions despite any rejection. Use a warm smile and a firm handshake. This can create goodwill for the AE and RJC.

6. Thank the interviewer for their time and consideration. If you have answered why you are interested in this assignment and what you can offer, you have done all that you can.

POST-INTERVIEW

7. Call the AE (if not present) immediately after the interview. Do not wait until you are back in the office or home. Alternatively, meet with your AE to debrief the interview.
   - How did it go?
   - What were the client's main concerns?
   - What information about the client organization, systems, schedules, plans, competitor information and staffing do you feel may be useful for follow-up?
   - What could we/you have done better (lessons learned)?

8. Complete the Post-Interview forms.

QUESTIONS & ANSWERS:

Client & Consultant

PURPOSE

The purpose of the checklist is to provide a list of suggested questions for review prior to a client interview. This will ensure comprehensive interview preparation, minimizing interview failures. The idea is to anticipate the types of questions to be asked by the client and be prepared with specific answers. Alternatively, it is to prepare relevant questions for the client.

RESPONSIBILITY

The Consultant is responsible for using the checklist in conjunction with their AE and MDCS. The AE or MDCS is accountable for providing the checklist to the consultant and discussing which questions are relevant

FREQUENCY

This checklist must be reviewed in preparation for all planned interviews.

DISTRIBUTION

The checklist is not a form, and therefore is merely kept on file for use by the AE or MDCS.

QUESTIONS & ANSWERS

CLIENT ASKED

ATTITUDE ISSUES

1. **Q. How long have you been with RJC?**

   A. I have been with RJC for X number of years.
   If a contingency hire: I can be available in X number of days, weeks, etc.

2. **Q. Why do you like consulting?**

   A. I like the variety of engagements and technologies.
   - I like working with different people, environments.
   - I like the challenge of keeping up with a variety of technologies, industries, and clients.

3. **Q. How do you feel about overtime?**

   A. I feel fine. Projects will require such commitments on occasion.

4. **Q. Do you prefer development or maintenance?**

   A. As a consultant I am called upon to perform many roles, each as important to the client as the next. A development role will allow me to do ... details ... for you. A maintenance role will allow me to do ... details ... for you. In either case, I will use the most efficient available resources to quickly get the job done, and suggest other areas for improvement to you.

5. **Q. What are you doing right now?**

   A. If a contingency hire: I am working at a company that I have decided to leave, doing ... details ... type of work.
   - If between assignments: I am currently between assignments and am:
     - Working on an office project
     - Training/cross training on ... specify ...
     - Providing assistance to other consultants in ... specify ...
     - Just completed a project on ... specify ...
   - If currently assigned: I am working for a client doing ... details ...

6. **Q. When are you available to start?**

   A. When deferring: My AE can assist with dates and scheduling.
   When committing: I can start on ... date.

7. **Q. How would you describe your own standards of performance?**

A. I strive for excellence, expect to deliver services and work product on time, or earlier. I seek to treat the engagement as part of your business solution. I have sought and taken training in ... (quality assurance, formal) methodologies, etc.)... and can incorporate that into the development process.

TECHNICAL ISSUES

8. When asked an open-ended question (how ..., what tell me about..., explain ..., describe compare) answer in three parts: the business reason for the question, the application affected, and your specific responsibility or involvement

EXAMPLE:

Q. - Explain to me your involvement in a General Ledger system design.

A. - The client was combining two dissimilar ledger systems involving disparate product lines. This required a redesign of the chart of accounts, source files and multiple database standards to be accommodated. The ledger interfaces, database update procedures, and screens needed to be redesigned. I was the lead system analyst who determined how that was to be done and provided the specifications and test regime for the successful integration of the ledger information.

9. Be able to answer the question: "What do you know about my environment?" If the interviewer does not ask the question, look for the opportunity to say, "I have been given some details about the assignment and environment. Can you explain some details and your main concerns?" This allows the client to speak about known topics, indicates your interest and allows you to map the client's response to your base of experience for a follow-up comment.

10. When asked a technical question about an ability you don't have, such as, "Have you worked on a General Ledger system before?", respond in the following way: Instead of saying, "No.", you might relate it to your experience and say, "No, but I did work on an Accounts Receivable system that had substantial interfaces with a General Ledger system, where I had to coordinate with that interface team." Look for experience similarities, not differences.

11. **Q. What can you do to support out efforts?**

A. Provide your most related experience. Start with the business reason of the experience, the applications affected, and your specific responsibilities. Suggest that you bring this experience, knowledge, and the overall business awareness to meet the client's goals.

QUESTIONS & ANSWERS

CONSULTANT ASKED

NOTE: Check with your AE and plan the approach. Limit your questions to the two or three best for the engagement.

TECHNICAL

1. Q. What are the upgrades or future products your company is planning in relation to the engagement?

2. Q. What are your most pressing technical obstacles to success on this project?
   What are your most pressing resource obstacles to success on this project?
   What are your most pressing budgetary obstacles to success on this project?
   What are the biggest challenges for the team/you/the department?

3. Q. How is this assignment/project related to the previous project? To the next project?

4. Q. How does this application interact with other systems? (Specify likely interfaces if you are well versed in such systems.) If so, how is liaison and coordination achieved with those interfaces?

5. Q. How are specification changes or project changes determined and controlled in your organization?

6. Q. What are the key deliverables for the project/assignment?

7. Q. If you know of and have experience with advanced technologies or tools that might apply to the project, ask if they are available or needed (for example: TSO/ISPF, REXX, CASE tools, etc.)

ORGANIZATION

8. Q. Who will I report to?

9. Q. How will your department/function/system support your company's business in the future?

10. Q. What have been the two most successful projects in the past two years? How were they determined to be successful (what measure)?

11. Q. At the conclusion of this project, how will you determine success?

PERSONAL/PROFESSIONAL

12. Q. What are your expectations of me?

13. Q. What value-added contributions would you look to me to provide?

INTERVIEW STANDARDS - DO'S & DON'TS

PURPOSE

The purpose of the checklist is to provide a list of suggested behaviors for review prior to and during a client interview. This will ensure comprehensive interview preparation, and minimize interview failures.

RESPONSIBILITY

The Consultant is responsible for using the checklist in conjunction with their AE and MDCS. The AE or MDCS is accountable for providing the checklist to the consultant.

FREQUENCY

This checklist must be reviewed in preparation for all planned interviews.

DISTRIBUTION

The checklist is not a form, and therefore is merely kept on file for use by the AE or MDCS.

INTERVIEW STANDARDS - DON'TS

ARRIVAL: PRE-INTERVIEW

1. Do NOT interview if the skills or experiences are inappropriate.

2. The top 10 interview turn-offs to avoid are:
   - Lack of knowledge about the company/expect interviewer to provide details.
   - Lack of knowledge about why they are in the interview, what the client needs.
   - Lack of interest, insight and enthusiasm.
   - Poor attitude:

arrogant	condescending
hostile	inflexible
unenthusiastic	immature
lack of poise or professionalism	what's in it for me?
too passive	negativity or pessimism

   - Poor behavior:

unprepared.	late
rude	inappropriate attire
lack of social and interpersonal skills	evasive
overly talkative	loud
low energy	shy
smoking	distracted, nervousness
gum chewing	over familiarity
disclosing immoral or unethical behavior	insensitive
	inconsistent

   - Poor communications skills:

poor oral/written/presentation skills	vague or rambling responses
over stating qualifications	not listening
slang usage	non-responsive
shallow answers	resume mistakes
canned responses	poor conversationalist
not understanding questions	poor eye contact
cannot relate client's concerns to own abilities/experiences	poor English language skills
	lack of relevant client-oriented technical questions

INTERVIEW STANDARDS - DON'TS

ARRIVAL: PRE-INTERVIEW - Continued

- Poor appearance: unprofessional attire, poor grooming/hygiene.
- Lack of teamwork or leadership skills.
- No sense of value added nature of consultant towards the client.
- Lack of technical skills:
  lack of industry related experience
  lack of application related experience
  lack of business related experience
  poor fit of known experience.

DURING THE INTERVIEW

1. Never speak negatively about past experiences, projects, competitors or people. Keep all comments positive.
2. Never indicate that a task is below you. Be professional to all aspects of the engagement.
3. Do not use acronyms or buzz words. Explain your terms. Do not embarrass the interviewer if you are more knowledgeable.
4. Do not attempt to become friendly or remain aloof. Avoid terms like Sir, Ma'am, buddy, etc..
5. If the interview is:
   - Over lunch: do not drink, even if the client does.
   - After hours: do not drink, even if the client does.
6. Avoid under-qualifying your experience, don't use: "a little", "old", "rusty".
7. Avoid over-qualifying your experience, don't use: "huge system", "a lot of OT", some UNIX.... etc.
8. Don't lie. Remain confident.
9. Avoid long-winded answers (avoid "snow jobs"). Listen to the client's description. Cover only the important points, answer the questions completely, and avoid anecdotes.

INTERVIEW STANDARDS - DON'TS

DURING THE INTERVIEW - Continued

11. Avoid nervous habits. Practice eliminating them, such as:
    - avoid stimulants, coffee before an interview
    - arrive early, don't be rushed or hassled
    - use deep breathing techniques
    - tense and relax muscles in your arms and legs
    - think of tranquil and relaxing moments in your life
    - don't worry about last minute problems - you can't change them now

    Concentrate on the interview.

12. Don't lose eye contact:
    - listen intently to the words of the interviewer
    - look at the person's nose or forehead, if not the eyes, don't stare, break eye contact occasionally.

13. Do not interrupt the client when speaking

INTERVIEW STANDARDS - DO'S

ARRIVAL: PRE-INTERVIEW

1. Dress professionally

2. Plan to arrive early. Tardiness is never excusable. In an emergency call as soon as possible. Be compassionate about the interviewer being late: they are busy people and may be nervous as well.

3. The AE should accompany the consultant to the interview, and may attend if appropriate. The AE can be an aid as follows:
   A familiar face (psychological support)
   A possible source of cues
   A source of encouragement
   A possible break in a difficult interview.

4. Fill out any paperwork given. Be neat and limit details so you can finish in 20 minutes.

DURING THE INTERVIEW

5. Use the interview to develop a professional rapport: convey interest, enthusiasm and determination in getting the engagement

6. Address all people by their first name in the interview. If there is only one person conducting the interview, sit face to face, near the client.

7. Always have a prepared presentation and be prepared to present it to a client.

8. Be able to answer the client's questions (see Questions & Answers).

9. Answer using the "Tree of Knowledge" concept: answer a question from the bulk or trunk of knowledge you possess, where you are comfortable. As you progress towards the limbs where you know less, your knowledge appears shaky. Stick to the trunk of your knowledge.

10. Clarify the questions if need be. This shows interest, correct listening skills, and reduces misunderstandings.

11. Think. Avoid impulsive answers. Don't be afraid to take some time to formulate an answer.

12. Ask relevant questions, not basic questions that the AE and proposals have already answered. Stress the business aspects (client success) of the application or project. Show your interest in client success.

13. Sell yourself:

When you can answer a question affirmatively, start with: Yes, and ...
- my last project was...
- I have used it X times in the last Y years...
- All of my time/most of my time was spent...

When you have to answer a question negatively, start as positively as possible:
- I haven't done work in that technology, but I have been training in that technology in a hands-on mode
- Or....I have done work on another on-line system with similar characteristics
- or,... I haven't worked on a project of that scale, but I have worked on several smaller/mid-sized projects

14. Know the answers to questions about your strengths and weaknesses.

Avoid petty answers for weaknesses or shortcomings
Example for a weakness: I did not learn how to use the CASE tool because:
- the last few clients did not have the resource for their projects;
- there are a variety of CASE tools on the market and it is difficult to be a master of them all;
- my client responsibilities took me away from the opportunity to learn it/use it

Avoid using:
- I didn't have time.
- It wasn't important at the time.
- My (other) technical skills are all that really matter.

15. Take materials in hand from the client when client refers to them.

WRAP UP

16. Towards the close of the interview have two or three good questions for the client.

17. See "Closing the Interview" guidelines.

MDCS POST-INTERVIEW EVALUATION

PURPOSE

The purpose of the form is to provide feedback to the MDCS from each client interview about the consultant's performance during the interview.

RESPONSIBILITY

The AE is accountable for completing the form.

FREQUENCY

The form must be completed after each consultant's interview.

DISTRIBUTION

The AE must distribute to the MDCS along with all related account information (proposal, TAS worksheet) to provide the context of the interview. The MDCS will determine what guidance or training may be needed. The form should be filed along with the individual training goals and objectives for the consultant as part of the consultant's performance review.

MDCS POST-INTERVIEW EVALUATION

Client:____________________ Consultant:________________________ Date:_______________

FOR AE

BUSINESS GRASP OF CONSULTANT ON INTERVIEW:

TECHNICAL GRASP OF CONSULTANT ON INTERVIEW:

IMAGE PRESENTED BY CONSULTANT:

ATTITUDES & BEHAVIORS EXHIBITED BY CONSULTANT:

GENERAL CLIENT CONCERNS ABOUT -CONSULTANT:

MDCS POST-INTERVIEW EVALUATION

FOR AE	
BUSINESS GRASP ON CONSULTANT ON INTERVIEW:	Did consultant understand business issues and communicate them. Explain!
TECHNICAL GRASP OF CONSULTANT ON INTERVIEW:	Did consultant understand technical requirements? - Up-to-date skills? - Right mix of skills? - Experience level right?
IMAGE PRESENTED BY CONSULTANT:	How was the consultant perceived (Good or Poor)? - Appearance - Communication style - Demeanor
ATTITUDES AND BEHAVIORS EXHIBITED BY CONSULTANT:	Key attitudes & behaviors (Good or Poor) displayed. Refer to interview standards Do's and Don'ts
GENERAL CLIENT CONCERNS ABOUT CONSULTANT:	Did client voice any concerns? - Negatives - Limitations - Personality issues

POST-INTERVIEW FOLLOW-UP

PURPOSE

The Post-Interview Follow-up provides a mechanism for feedback to the AE on the information gleaned from a consultant interview with the client. This may yield account relevant information, client interviewer knowledge and consultant performance information.

RESPONSIBILITY

The AE is accountable for having this form completed. The AE is responsible for completing the form, if present at the interview. In the event the AE is not in the interview, the Consultant is responsible for completing the form.

FREQUENCY

The form must be completed after each consultant interview.

DISTRIBUTION

The form is distributed to the AE for review. The AE should transfer relevant information to the account plan.

POST-INTERVIEW FOLLOW-UP

Client:____________________ Consultant: ________________ Date:____________________

FOR CONSULTANT- OR AE

CLIENT'S COMMENTS AND QUESTIONS:

DESCRIBE ANY CONCERNS OR PROBLEMS YOU ENCOUNTERED:

LIST POSSIBLE OPPORTUNITIES (TECHNOLOGY TRENDS, RELATIONSHIPS, PROJECTS, ETC.)

LIST NEXT STEPS REQUIRING FOLLOW-UP AND ACTION TO BE TAKEN:

ADDITIONAL COMMENTS:

POST-INTERVIEW FOLLOW-UP

Client:____________________ Consultant:________________ Date:___________________

FOR CONSULTANT OR AE

CLIENT'S COMMENTS AND QUESTIONS:

What did client seem to focus on?
- Pointed comments
- Repeated or high value questions
- Themes

DESCRIBE ANY CONCERNS OR PROBLEMS YOU ENCOUNTERED:

What did client voice?
- About consultant
- About proposal
- About RJC
- About approach
- Client's avail?
- About his/her own organization
- About his/her own employees

LIST POSSIBLE OPPORTUNITIES (TECHNOLOGY TRENDS, RELATIONSHIPS, PROJECTS, ETC.)

What did you hear?
- Future client plans, project
- Concurrent activities of other users
- Useful client relationships with client, with RJC, etc.

LIST NEXT STEPS REQUIRING FOLLOW UP AND ACTION TO BE TAKEN:

WHAT	WHO	WHEN

Where should we go with above information, what could be done, what commitments were made?

ADDITIONAL COMMENTS:

Anything else with value?

INTERVIEW PREP KIT

The primary purpose of a client interview is to provide a potential or existing client with the opportunity to meet with a member of our professional staff. The purpose of this meeting is to impress the client with the overall quality of the candidate for the assignment, and demonstrate that RJC understands the client need by matching the consultant to the solution for the client's business, concerns, assignment and critical success factors.

This reflects the basic understanding that the AE and the Consultant form a partnership with RJC in our mutual success. The partnership includes RJC's understanding of the Consultant's needs, his/her abilities, and career development. It also includes the Consultant's appreciation of RJC's business requirements and the development of personal business awareness. This partnership is the key to RJC objectives.

During the interview, the client's objective is to determine if the proposed consultant possesses the knowledge and skills necessary to succeed in the client environment. This will be a composite of both professional ("soft") skills and technical ("hard") skills. The AE's objective is to maximize the probability of an engagement for correctly chosen and prepared consultants for specific assignments, and thereby increase RJC's overall success rate. The Consultant's objective is to team with the AE with early preparation for the interview and understanding of his or her role in the client's business and technical environment.

RJC's hiring profiles and interview process are designed to maximize client appreciation for RJC. A good interview process and the presentation of the right person almost always cause the reasons for a Consultant being accepted by a client. An interview usually fails for one of two reasons:

- Lack of RJC preparation: this includes an inadequate understanding of the client's requirements, or the failure to brief the consultant on what to expect.

- Lack of preparation on the Consultant's part: assuming that the Consultant was <u>properly</u> briefed on the assignment, it is always the responsibility of the Consultant to be professional, mentally prepared, enthusiastic, prepared to show the client why they are right for the assignment, answer questions relating to his or her abilities, and present the right RJC image.