

# Service Consumption

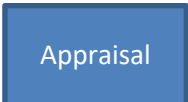
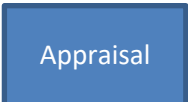
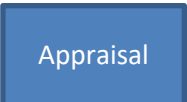
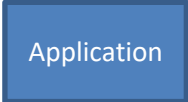
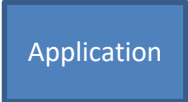
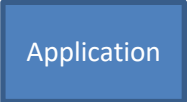
Account Managers View –  
First Round Results



# Background

- Acc Manager and account team are responsible for identifying the pieces of a project.
  - Currently these are then supported by our 54 products which are grouped into frameworks:
  - Strategy Development, Business Improvement (increase productivity), Market Development (prioritising exporting), Organisational Development (leadership improvement), Investment & Innovation (high growth ventures)

# Project Structure



# Project Breakdown

- For a variety of reasons we break big projects down into smaller pieces (using a variety of methods).
  - Current CRM model is 1 application > 1 product > 1 appraisal.
  - Our current metrics also cause this breakdown of work. Different sections of the business want/need to measure the impact of what they're doing. We capture the costs of each service separately. I.e: capturing metrics at a service level rather than a project level. The project is only updated when you're adding a new service.
  - Specialist teams and isolated teams/individuals also create separate projects that are disconnected.
  - "There's always a way to get it through". If an AM decides they want to do something with a customer then they'll find a way to do it.
  - The drive to break things down is so strong some AM's intentionally group work in the wrong products to avoid having to do more paperwork.
  - Sometimes specialists create projects but don't communicate this to the AM. AM is responsible for the project data in CRM but it's impossible to maintain without good communication with the specialist. This leads to data corruption.

# Don't Break It Down

- Breaking them down is a bad idea and not the direction the business is going in.
  - By grouping discrete tasks into bigger projects we drastically reduce wasted funds and lower our risk. The primary reason for this is making work easier to discontinue (or not start) if something essential doesn't happen or throws up a blocker.
  - For example, say your company goal is to start distributing in Germany. We treat this as a big project and identify a couple of things that need to be done (say market research, sales channel development and German specific product development). If market research comes back and says we shouldn't be selling in Germany, we can stop the development work. This only works if these streams are all grouped together as a project.
  - Another reason for this approach is big projects lead to learning that is re-usable, more widely applicable and of higher value to the business. Continuous small scale pieces of work don't tell us very much (ie: the product improvements we made to get into the German market don't mean much on their own, they need to be considered alongside what else we did to break into that market).

# Challenges

- Some customers won't all understand the 'big project' approach – they'll see things as fragmented pieces (particularly customers who are not at a top strategic level within their business). We should be able to convince our primary customer contact that 'big project' is right for them and explain how the pieces fit together.
- Big project model not compatible with the current CRM setup.
- How do we account for things that AM's provide that aren't SE services. They add value to the customer, but aren't necessarily captured by us. These can be an important part of successful outcomes for customers.
- Unclear currently the connections between a service record in CRM and that records entries in POP/KMIS.
- Internal metrics currently driving what the customer sees and how they interact with us.

# Customer Behaviours

- DRM companies use their account manager as their primary point of contact and source of information; NRM companies go to our website.
- Customers are not given visibility of our specific grants or products. They don't need visibility and we don't want to give them visibility. Customer sees SE as a body that could support whatever it is they want to do and they need visibility of how/why we could do that.
- 2 types of customer: 1 customer tells you everything about their business so you can see the whole picture (they see us as a strategic partner). The other says out of the blue I'm looking to do this, can you give me money for it (often they just want to save money, not achieve bigger aims).

# Current Change

- We need to establish the minimum amount of funding that a customer needs to achieve a desired outcome. Business is moving from percentages to actual amounts.
  - This is supported by doing more in-depth analysis of customers data and is driven by a SE business need to save money.
  - Challenging for us as we historically have always talked in %'s rather than £'s. Easier for customers as they tend to think in £'s.
  - Customers work harder and care more about a business objective they've put their own money into. Where we cover the whole amount customers become disinterested.



# Summary

- SE driving towards establishing the minimum amount of support from us that a customer needs to go ahead with a project.
- AM's can't view their projects and the services supporting them in one place.
- AM's are a challenging group to cater for as they all work in different ways. It appears most behaviour is driven by systems that don't work.
- All evidence supports the model of presenting customers with a high level project supported by services.
- Currently systems do not support this model and force a disjointed approach to be adopted (and work arounds to be created).