

## IDENTIFYING CLIENT NEEDS.

The “Tick-a-box” approach.

One can make a number of assumptions about client needs at a given time and to some extent the CAM approach in addressing these needs is fairly obvious. Many of the issues companies face are common and have been detailed in Section 2 of the Practitioner’s guide. We have taken this a step further by distilling the critical adverse impact on the business environment of:

- Expectations and
- Flexibility.

While our conviction of CAM’s relevance is firmly entrenched, taking affinity for granted is risky. This may be stating the obvious for most seasoned consultants who know that to reduce this risk, one has to make some effort at researching the specific needs of a prospective client. Much of this can be found in the public domain via websites, published reports and public pronouncements of its leaders. (Bearing in mind, of course, that public domain data seldom reflects problems being experienced). Once all of this information has been gathered, it should be blended into a sales presentation in a standard issue-versus-solution format.

An additional useful tool, even and perhaps especially, where an approach has come from a prospective client, is to undertake some specific data gathering through a snap questionnaire that can enrich the issue/solution format. This “Tick-a-box” example is by no means comprehensive and you should design your own questionnaire to suit. Also, the CAM solutions (in a separate document) are very cryptic and should be fleshed from the guide and accompanying references.

Include in your research, the global and national surveys that have been done on critical issues facing business. There are many of them and most agree on the top 10 or so. You may want to use the template to test your own comprehension of the CAM approach by filling out the “Solution” section and referring it to the author for further consultation.

On the next page you will find a list of the more general critical issues that enterprise has to deal with. Many of them cannot be addressed directly by CAM, but it is our argument that following the old wisdom of focusing on those things you are in control of, equips you better to deal with those things you are not. This relates specifically to market orientation and internal flexibility, which are markedly enhanced through the principles of Common Purpose; Common Fate.

The list also broadly categorises the issues in terms of Wealth Creation (c), and wealth distribution (d). Of course, there is a powerful circular relationship between the two, where solutions to one provide a solution for the other. Similarly one can also view them from having an external focus, or internal; and/or addressing context or content. The number categories broadly reflect (1) the market; (2) labour and (3) structural, external forces and other.

These categories may also be helpful if your approach is going to be based on broader strategy and unpacking problem solving through the Contribution Account<sup>©</sup> itself.

## CRITICAL ISSUES:

Service orientation	c	1
Customer experience	c	1
External communication	c	1
Innovation	c	1
Public Trust	c	1
Strategic thinking	c	1
Uncertainty	c	1
Are staff expectations realistic?	d	2
Employee awareness	d	2
Employee involvement	d	2
Employee Trust	d	2
Flexibility: attitude/expectations	d	2
Flexibility: Pay	d	2
Internal communication	d	2
Productivity (defined as maximum wealth creation)	d	2
Skills availability	d	2
Staff diversity and cohesion	d	2
Subscription to shared goals	d	2
Transparency	d	2
Ethical standards	d	3
External threats (list below)	c	3
Flexibility: Structural	c	3
Governance issues	c	3
Information overload	c	3
Profitability	d	3
Regulation	c	3
Supply chain issues	c	3
Technology	c	3

Blank answer templates have been provided at the end of this questionnaire for additional issues that may be raised.

- Stress that where solutions are suggested they should focus on what can be done by the enterprise itself, rather than what others or outsiders should do.
- When addressing issues such as profitability, ensure an understanding that the CAM shift in focus from profit to value-added is a means of improving profitability through maximum wealth creation. It does NOT imply relaxing sound profitability norms or abandoning shareholder expectations.
- Select about 5 of the top concerns with the lowest rankings and focus on those in your solutions proposals.

















