

Partnering with Clients

Building strong partnerships to maximize training impact



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Webinar Objectives



Explain the importance of partnering with clients;

Outline ways of partnering with clients through the training cycle;

Describe possible issues that can arise in partnering with clients;

List ways of building strong relationships with clients.



- . Importance of partnering with clients;
- . Partnering with clients through the training cycle;
- . Possible issues in partnering with clients;
- . Building strong long-term relationships.

How you'll benefit



Strengthened client relationships

More effective delivery of training projects

Higher training impact

Trusted advisor

Enhanced professional profile

Positive referrals

The importance of partnering with clients



Purpose of training

People transformation:

Knowledge

Skills

Attitudes...

...for improved
organizational performance
Achievement of strategic
objectives

Training Competency Wheel (Training Life Cycle)



Source:
IFC GLC from Institute
for Performance
and Learning

Importance of partnering with clients throughout the training cycle



- They own project and outcomes;
- They know what success looks like;
- You need to understand exactly what's needed and provide it as efficiently as possible – cost and time-wise, while adding value.

Partnering with clients (GLC guide to training)

- Demonstrate awareness of client organization;
- Support client in making effective choices;
- Develop agreements with clients;
- Make changes throughout a project;
- Interact effectively.



Principles of learning Principle 1



Align learning objectives and evaluation methods with the client's performance needs and business objectives.

Principle 1 – Principles of Learning

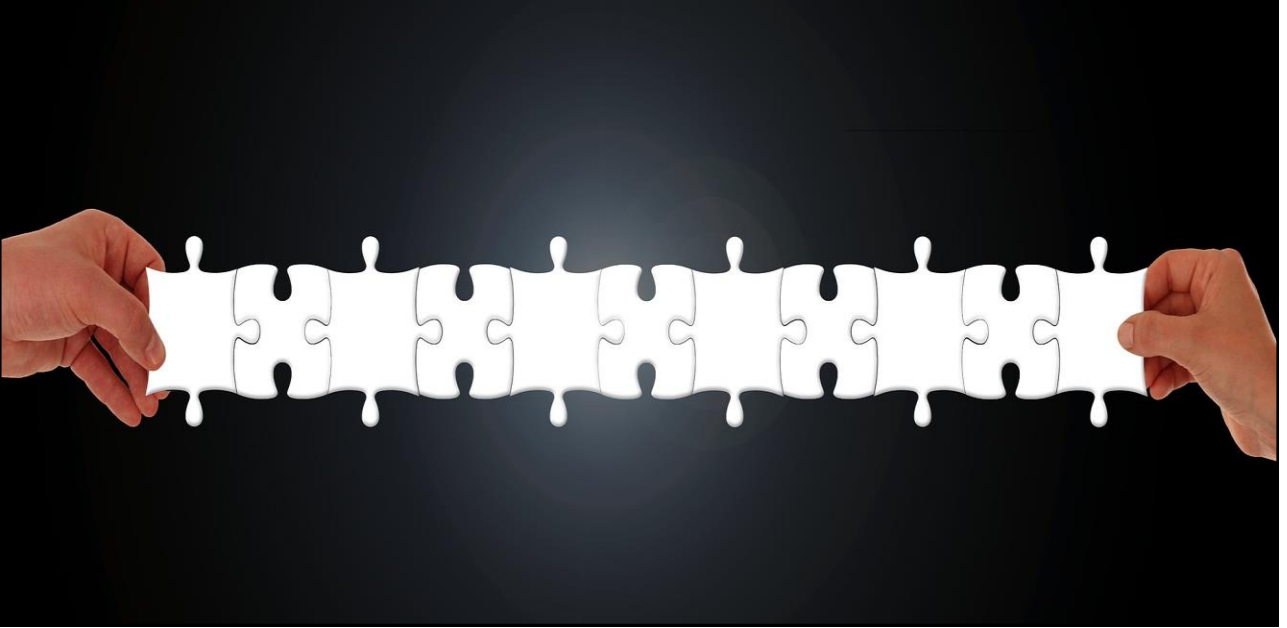


“A training or skills development practitioner should always collaborate closely with the client, for example, the entrepreneur, company or organization to gain a clear understanding of their desired performance outcomes, targets, and business objectives.

All content and activities in the programme should align with these outcomes. Evaluation methods should be developed to measure success.

Agreements should be established with clients to ensure learning goals match the business objectives.”

Partnering with clients through the training life cycle



Prior to starting the training cycle



- Strategic objectives set
- Performance gaps noted
- Need for training identified
- RFP/ Training brief
- Proposals presentation
- Selection and negotiation
- Contracting

The focus of training should always be achievement of strategic objectives

Important

As the clients' partner:-

- Ask the right questions
Understand big-picture and keep in focus
- Become trusted advisor (partner)



Ideas for partnering with clients: Stages 1-3

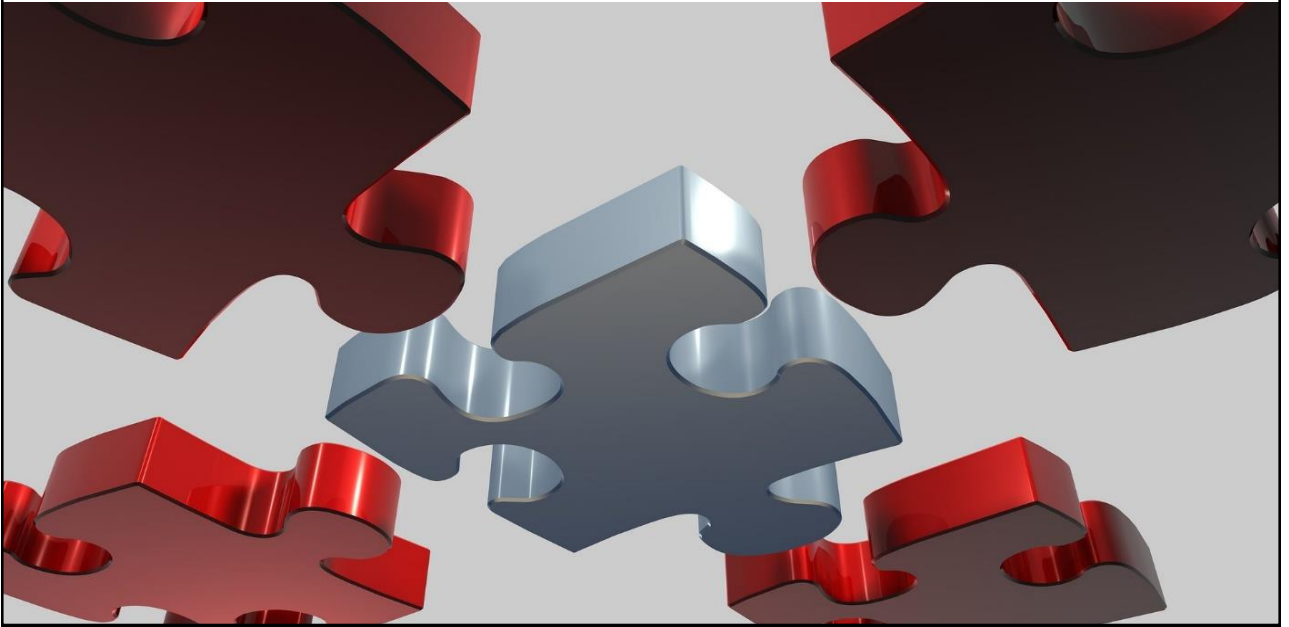
Assessing Performance Needs	Designing Curricula	Designing Learning Experiences
<p>Right enquiry to understand purpose of the training, gaps and desired outcomes.</p> <p>Sharing needs assessment design and liaison on logistics.</p> <p>Conducting needs assessment and sharing findings and training design ideas.</p>	<p>Map out the learning journey: Develop detailed training outlines based on needs assessment and share with client for comment.</p> <p>Refine based on feedback.</p>	<p>Use refined outlines as a base to develop the actual training content. Confirm with client as needed.</p> <p>Liaise with client to organize pilot(s).</p> <p>Refine content based on pilot and client feedback.</p>

Ideas for partnering with clients: Stages 4-6

Facilitating Learning	Supporting Transfer of Learning	Evaluating Learning
<p>Logistics Progress updates Sharing immediate learner reactions Reporting and sharing observations and recommendations Plan supporting transfer of learning and evaluating learning</p>	<p>Liaison on support interventions Share support observations and feedback and agree improvements for future training and support.</p>	<p>Carry out based on pre-agreed metrics on performance and results. Development of future learning interventions.</p>



Possible issues in partnering with clients



Possible issues - Client



- Policy change;
- Change of project direction;
- Team changes;
- Environmental changes e.g. natural disaster, conflict and fragile situations;
- Global changes – e.g. Covid
- ...Etc

Possible issues - You



- Over-extension
- Over-promising and under-delivering
- Team changes
- Misunderstanding
- Miscommunication

In the first place:



- Adapt to clients – they are different
- Adapt to changes – flexibility and resilience
- Exemplary delivery
- Close collaboration – open communication and regular check-ins – agree frequency
- Anticipate and flag issues sooner rather than later (Proactiveness)

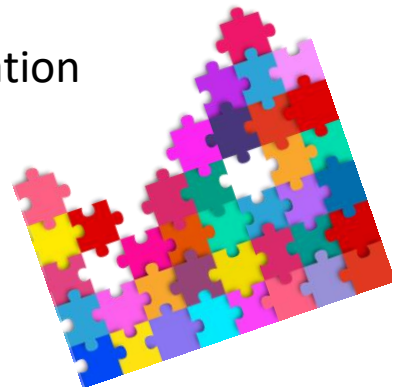
Solving the issues

- Open communication:
Listen and share
- Open candid feedback –
what's great and what's
not so great.



Solving the issues

- Engage in problem-solving: Collaboration
 - Acknowledge issues
 - Determine cause
 - Brainstorm solutions
 - Agree way forward
 - Evaluate



Important: Involve client throughout

If there's a break-down



- Make efforts to repair/ heal the relationship
- Discuss honestly
- Let the client know that they/ the project matter
- Don't take it personally
- Take responsibility as needed
- Learn and grow from the experience.

Solving the issues

Speed of resolution results in higher client resolution and retention: 83% of customers agree that they feel more loyal to brands that respond and resolve their complaints. ([Khoros.com](https://www.khoros.com)).



Building strong long-term relationships



End of project is not end of relationship

- Get feedback and testimonials;
- Stay in touch: e-mails, calls – appropriate frequency;
- Share newsletter/ Blog/ Events – keep it relevant;
- Maintain your network as you seek new connections.



Case study – Co-operative Bank

- NFS strategy in collaboration with IFC.
- 2018-2020: 4 ToTs, TOAs and MSME Training content. 95 trainers, Over 1000 MSMES trained.
- High trust and high liaison through all stages.
- Brainstorming and synergy.
- **Results:** Well-rated business clinics across the country. High value added to client.
- **Client feedback:** Understood and strongly supported.





“Go beyond merely communicating to connecting with people”

Jerry Bruckner – Attorney & Author

Resources

- GLC Guide to training:
<https://www.growlearnconnect.org/guide-training>
- **Handout:** Summary tips for each stage.



Let's connect!

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A close-up photograph of a blue marker writing the words "thank you" in a cursive script on a white surface. The marker is positioned at the end of the word "you".