

3. Develop agreements with clients






Importance






The impact of mastering these competencies is that you:

- Calculate projects' costs accurately.
- Plan project tasks, timing, and resource requirements accurately.
- Anticipate potential problems and put preventive and contingent actions in place.
- Meet or exceed client expectations for a project.
- Complete tasks (or project) on time.

Supporting competencies and tasks

These tasks contribute to mastery of the supporting competencies (in bold). Put a check mark next to each task or subtask within the supporting competency as you complete it:

3a	Clarify client expectations regarding a project
<input type="checkbox"/>	Ask questions to learn about the client's situation, purpose of the assignment, performance issues to address, and priorities
<input type="checkbox"/>	Determine client's commitment and capacity to support the program in an FCS setting 
<input type="checkbox"/>	Agree on the official language of the project and translation requirements
<input type="checkbox"/>	Determine key values that the client wants to convey or reinforce in the program
<input type="checkbox"/>	Ask questions to identify underlying concerns that might affect the program
<input type="checkbox"/>	Summarize and restate client expectations to ensure agreement
<input type="checkbox"/>	Determine how the client plans to decide which participants qualify to participate in the program
<input type="checkbox"/>	Determine appropriateness of monetary incentives for participants  
<input type="checkbox"/>	Determine confidentiality requirements
<input type="checkbox"/>	Confirm contract terms and conditions 
<input type="checkbox"/>	Determine the most appropriate methods for monetary transactions 
<input type="checkbox"/>	Determine client knowledge of the design and development process required to produce the work
<input type="checkbox"/>	Determine measures of success
3b	Gather information about previous similar projects
<input type="checkbox"/>	Assess client willingness and ability to share prior information with you
<input type="checkbox"/>	Investigate past experiences with the client, sponsor, and stakeholders
<input type="checkbox"/>	Investigate the process and outcomes of prior projects of similar type and scope
<input type="checkbox"/>	Investigate the reliability of information provided on prior projects
3c	Clarify roles of client, participants, other stakeholders, and performance and learning professional(s)
<input type="checkbox"/>	Identify whom to involve and the nature of their involvement
<input type="checkbox"/>	Identify available local or international resources (for example, trainers, designers, consultants, business learning specialists)

- ▶ Identify accountabilities for the client, participants, and other stakeholders (for example, who is responsible, accountable, supporting, consulted, informed)
- ▶ Identify who is responsible for researching, organizing, and paying for:
 - Catering, venue and equipment requirements 
 - Safety of participants and providers, including travel, venue and transport, and insurance and emergency services  
 - Establishment of social networks to reinforce learning and enhance the impact of the program
- ▶ Clarify who makes project decisions and how (for example, consensus, unilateral, change control process)
- ▶ Identify your role on the project, how you interact with others, and how your role affects upstream and downstream processes
- ▶ Identify communication protocols within your organization as well as in the client organization (for example, hierarchical or decentralized communication between project team members)
 - Discuss appropriate/available communications channels for the program  
- ▶ Refer to other experts as necessary to supplement your own knowledge or source other areas of expertise (for example, change management, recruiting, human resources, organization development)

- 3d Negotiate assumptions and deliverables, as well as level of quality, timing, and cost**
- ▶ Define project scope based on competencies in the assessing and designing categories
 - ▶ Determine how the client wants to prioritize trade-offs among cost, time, and quality
 - ▶ Set protocol for scope changes
 - ▶ Plan purpose and timing of meetings
 - ▶ Determine how the client would like to receive communication on status of the project
 - ▶ Determine acceptance criteria at each stage of the deliverables
 - ▶ List assumptions that affect project scheduling, deliverables and costs

Key outputs and assessment criteria

Mastering these competencies typically involves the following outputs. The assessment criteria indicate what would make the output appear to be high in quality.

KEY OUTPUTS	ASSESSMENT CRITERIA
Verbal and written agreements with clients	Client expectations reflected
	Stakeholders and roles identified
	Assumptions, deliverables, timing, and costs identified
Project plans	Plan makes best use of organization resources
	Project cost estimates are accurate
	Dates, dependencies, resources, durations, and costs identified
	Schedule is articulated
Professional credibility	Professional credibility is acknowledged by clients and other stakeholders