# A better way to improve team performance…

## CONTENT

- Job-specific frameworks developed from real-world experience
- Written by experts in their field
- Easily understood by novice and experts
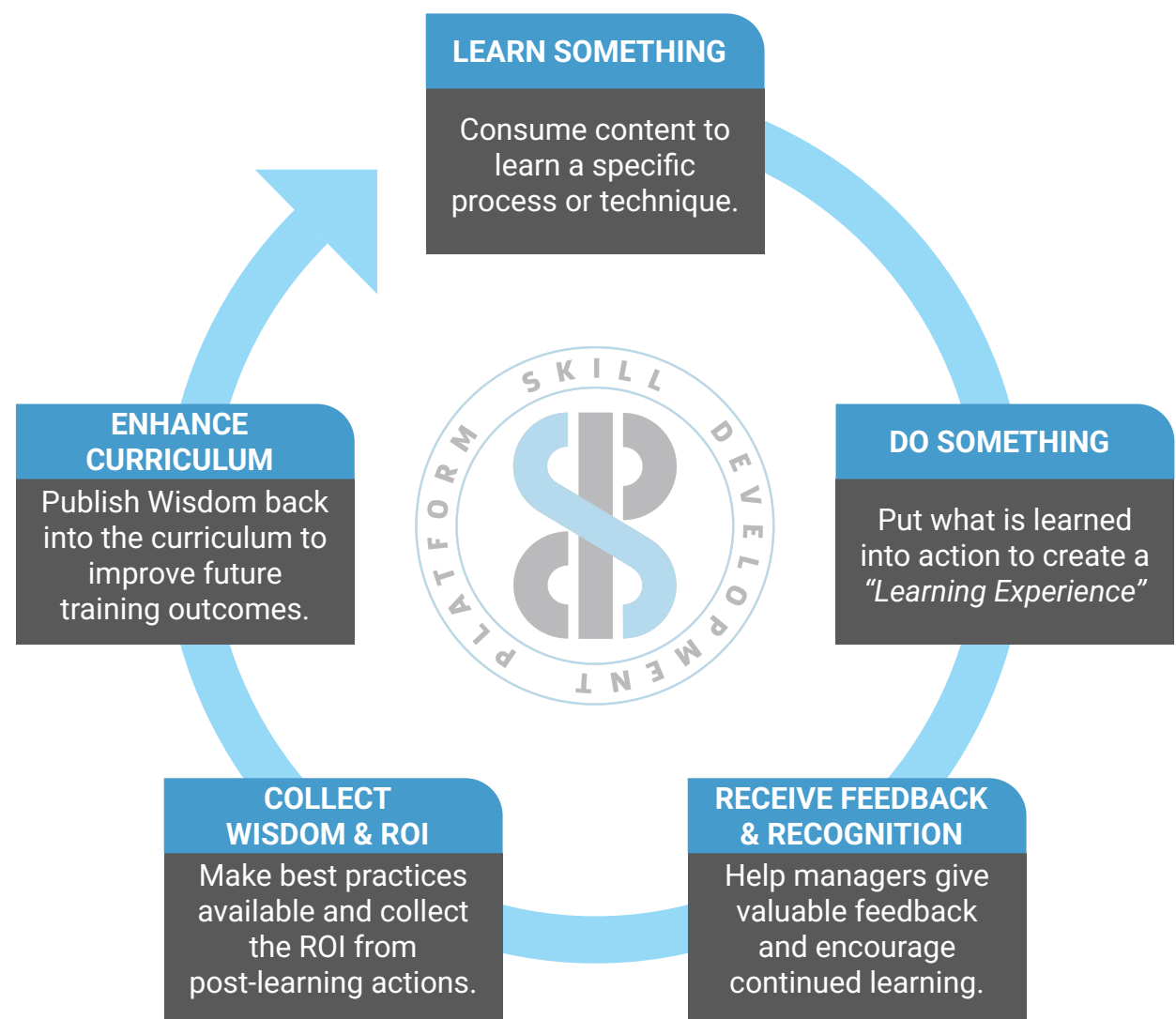- Inclusive of critical soft skills required

**+**

## ACTION

- Certified for ongoing action not just exams
- Collection of best practices from actions
- Ability to augment the curriculum with what was learned
- Capture ROI data to show improvement

*"We use PS Principles because <u>training</u> is a waste of money if it doesn't change how people do their job."*

- **Mike Parsons - SVP Professional Services - Insight**

PS Principles™

# Training is wasted if it doesn't result in a change in behavior...



**LEARN SOMETHING**
Consume content to learn a specific process or technique.

**DO SOMETHING**
Put what is learned into action to create a *"Learning Experience"*

**RECEIVE FEEDBACK & RECOGNITION**
Help managers give valuable feedback and encourage continued learning.

**COLLECT WISDOM & ROI**
Make best practices available and collect the ROI from post-learning actions.

**ENHANCE CURRICULUM**
Publish Wisdom back into the curriculum to improve future training outcomes.

**Project Consultants**
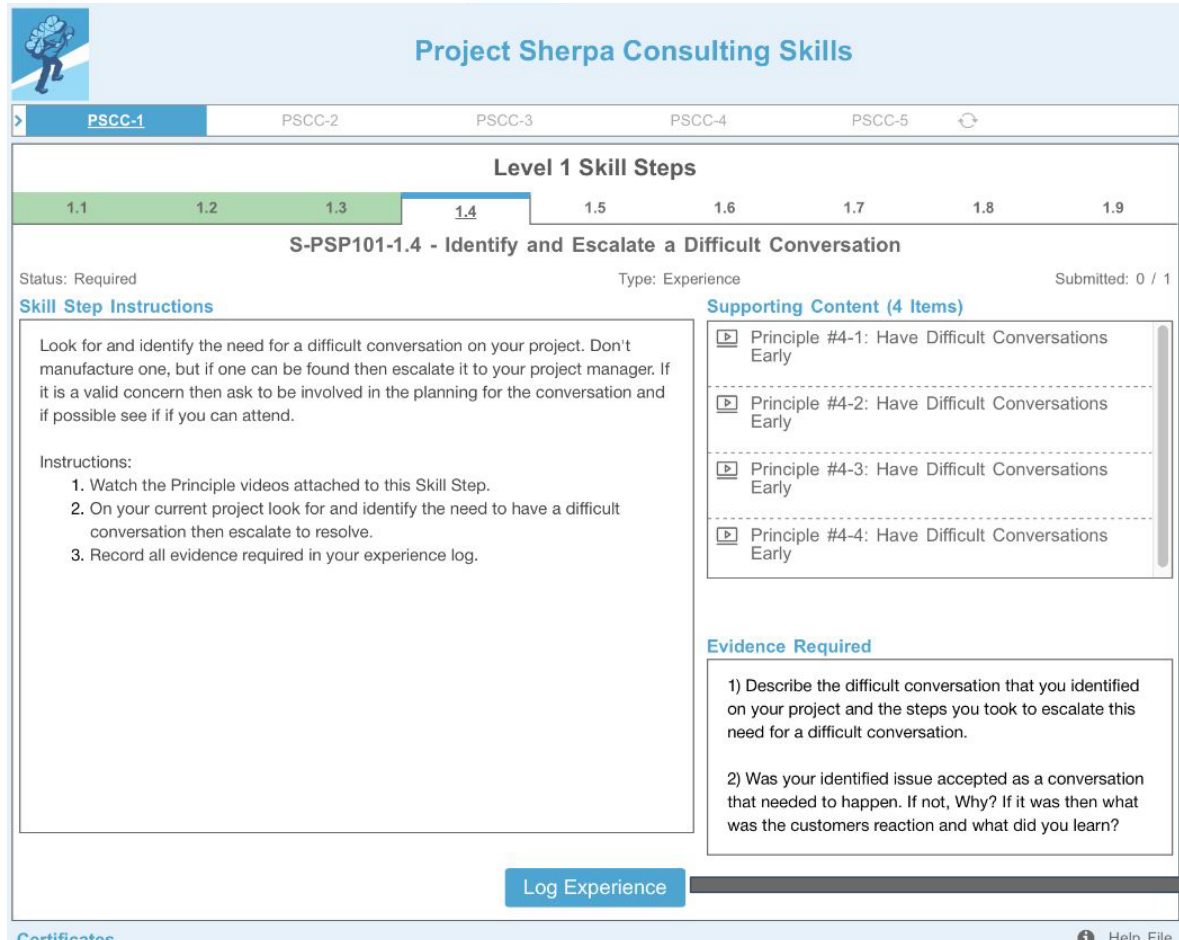
**Project Managers**

**Support Services**

**Customer Sucess**

**General Soft Skills**
(for Offshore, Other Service Representatives)
Coming 2026

**Custom Built Skills**
Build your own technical and non-technical skills

# Learn + Do + Reflect = Skill Development



- ➢ We provide evidence-based certification
- ➢ Experience is collected and approved by managers, audited by PS Principles
- ➢ 50,000+ field-based actions completed
- ➢ 30,000+ hours of **"saved"** rework
- ➢ More than 1,000 escalations **"avoided"**

# Personalized Coaching in Seconds

We pre-write each piece of manager guidance based on the experience provided.

Managers complete 1:1 reviews in minutes and provide personalized coaching in seconds for EVERY employee



## 1:1 Manager Review

W8safe, Jenny

W8safe, Jenny

Send Email

| Date Submitted | Engagement | Reviewed |
|---|---|---|
| Sep-09-22 | 7 | |

**Engagement Score**

**7**

**Why not +1 more?**

Lots of work creating a little bit of frustration.

-- JohnSafe Pora Sep 9, 2022 10:43 am:
Let's look at how we can reduce the workload by utilizing the spare resources we have

*Inquire and assist in re-engagement.*

**Add Comment>>**

Provide feedback to

**Recent Activity** Click to Review

| S-CSP101-2.4 Aug-20-22 Approved | Success Plan I |
| S-CSP101-2.3 Aug-20-22 Returned | Risk Mitigation |
| S-CSP101-2.2 Aug-20-22 Approved | Playbook I |
| S-CSP101-2.1 Aug-20-22 Returned | Customer Health Score |
| S-CSP101-1.10 Aug-18-22 | Contract Review I |

**5 Year Vision**

Would like to learn how to manage a professional services team.

**12 Month Goal**

Be team lead within architecture team.

**This Learner's Activity Trend**

2
1
0
Jul

Mark as Revi

## Approval Inbox

**Direct Reports**

Nw **W8Safe, No1**

  **Project Sherpa Consulting Skills**

  Level: 1. Competency
  Card: 1. Adapt via SOW

**Project Sherpa Consulting Skills**
**S-PSP101-1.1 Adapt via SOW**

**Status:** Submitted
**Submitted:** Jun 24, 2022 3:39 pm
**Logs Required:** 1 (this one)

**Instructions**

1. Watch the videos attached to this Skill Step. After watching the videos, complete the following action.
2. Read an SOW or similar project defining document for a project you are currently staffed to.
   a. If the project is yet to kickoff, what questions do you have for the sales team that might help you prepare for kickoff?
   b. If your project is in progress, does your SOW still reflect what you see

**Evidence Required**

To complete this step record the outcome of your effort as an Experience Log. How was your experience with this process? Did it help you get a better idea of the project environment in which you are working? What else could have been done to improve this process?

**Employee Experience**

When I put this into practice it kind of worked, but also didn't. The customer got upset about me telling them this on the phone. I'm not sure if I should have gone on site for this kind of a discussion so would appreciate any feedback you might have.

**Approvers Response**       **Cycle: 1**  History (click)

Approver Comments...

☐ add as pre-written response
*enclose variable text with |pipes| for future reference*

**Approve**    **Return**

**Coaching Guidance**                Pre-written (1)

1. Ensure the participant accurately identified leverage within the SOW.

2. While reviewing this skill step remember that resolution of any misalignments identified is important, so it may be worth reaching out to ensure that whatever was identified, was eventually resolved.

**Send to SME**

🏆 **Give Recognition**
**IT'S BEEN A LONG TIME!**

# Capture & Reuse Wisdom Automatically

| Wisdom Automatically Captured | Publish _Your_ Wisdom back into the Content |
|---|---|
| Wisdom collected from experiences, articles and best practices is instantly made a available through AI inquiry. | Augment the standard training so that it becomes company-specific for future learners.. |

# Monitor Learning at Scale



**Admin**

**Managers**

**Learners**

- Identify who is engaged in learning

- Identify those needing help

- Track each user across all skills

- Set target completion dates

- **Collect / Adjust ROI from Recognitions**

# We can change how teams deliver customer-facing projects…

| COMPANY | CONTACT | TEAM SIZE / INDUSTRY | QUOTE |
|---|---|---|---|
| smartsheet | Kevin Stanley<br>Director - Consulting<br>North America<br>kevin.stanley@smartsheet.com | 80 / Enterprise Software<br>*Professional Services* | *"This course has probably been the most valuable course I have taken during my career. The experience and value I have gotten from this course probably would have taken me years to gather myself."* |
| VESON NAUTICAL | Jesse Dilanni<br>SVP Professional Services and Customer Care<br>jdiianni@veson.com | 120 / Voyage Management<br>*Professional Services*<br>*Support Services* | *"Veson, we have transformed our Professional Services team to become a competitive differentiator that is capable of leading the customer from the end of the sales cycle through to their introduction to customer success."* |
| Insight | Chuck Archer<br>Director - Services Program Management<br>chuck.archer@insight.com | 800 / Microsoft Solutions<br>*Professional Services*<br>*Support Services* | *"I have seen firsthand the improvement brought about by using the PS Principles frameworks. Our chances of success have greatly improve with better expectation management, adherence to accountabilities and the ability to leverage resources more effectively."* |
| Schneider Electric | Kristine Baugh<br>Global Education Leader<br>kris.baugh@se.com | 300 / Management Software<br>*Professional Services* | *"Completing the skill cards really pushes us to apply the new learnings and use the tools – so this is indeed very good and motivating! I see the skills already applied in real cases!"* |
| Kinaxis | David Kelly<br>EVP Professional Services<br>david.kelly@kinaxis.com | 400 / Supply Chain Logistics<br>*Professional Services* | *"Our team's approach to customer projects has changed. Our team is more prepared to identify and escalate the decisions that are dragging projects off course and deal with them proactively. This is saving us money and customer satisfaction."* |

## 95% of Consultants say we *CHANGED* the way they deliver their service!

PS Principles™

# Case Study (Professional Services & Support Services)

**Program Data**

- **Learners**: 111
  - Professional Services
  - Support Services
- **Started:** 2020
- **Completed Steps**: 2,500
- **ROI:** More than $800,000 in Saved Rework & Escalations in 3 Years

**Executive Summary from Jesse D'Ianni**

**SVP Worldwide Services & Support  - jdianni@veson.com**

*Team Culture*
- Cornerstone of our "Ways of Working" training program
- Changed the way we speak about consulting
- Rapidly onboard new hires with content & action

*Escalations*
- Drastic reduction in reactive escalations
- We now have total command of engagements

*Billable Utilization*
- Non-billable rework has reduced to almost zero (3 years)

*Operations*
- SOW Best Practices increased our deal size by changing how we position the value of professional services

**PS Principles**™

## Thank You

Please let us know if you have any questions.

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