



PS Principles™

Rapid Development of Professional Service Skills



Consulting

Project Management

Support Services

PS Management

Services Selling

Customer Success

A better way to improve team performance...

HITACHI
Inspire the Next

kinaxis

VESON
NAUTICAL

Insight.

riskconnect

PLEX

splunk>

Gainsight

smartsheet

Ironclad

GE VERNOVA

Schneider
Electric

Alkami

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



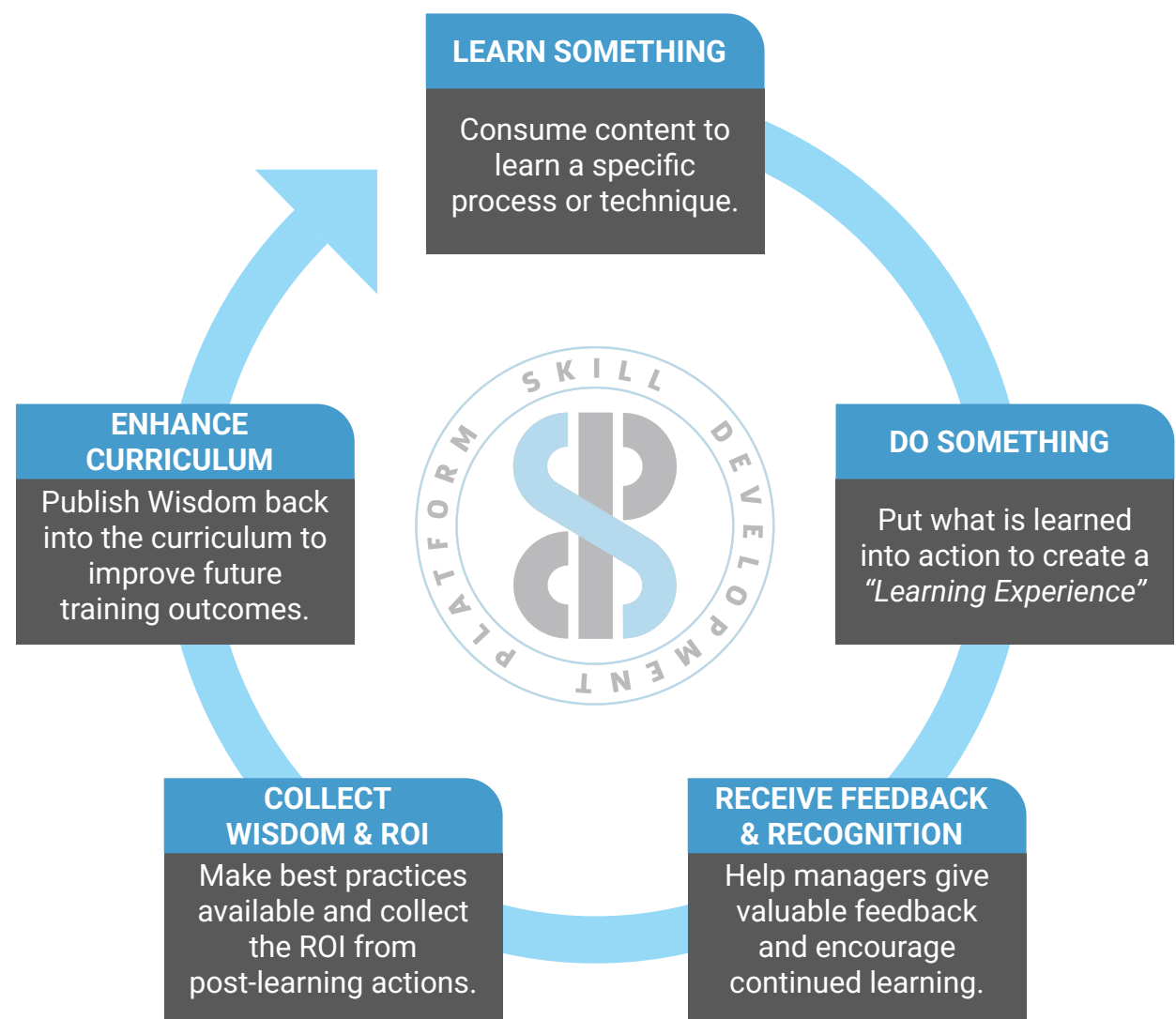
ACTION

- 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 training is a waste of money if it doesn’t change how people do their job.”

- Mike Parsons - SVP Professional Services - Insight

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



Project Consultants

Project Managers

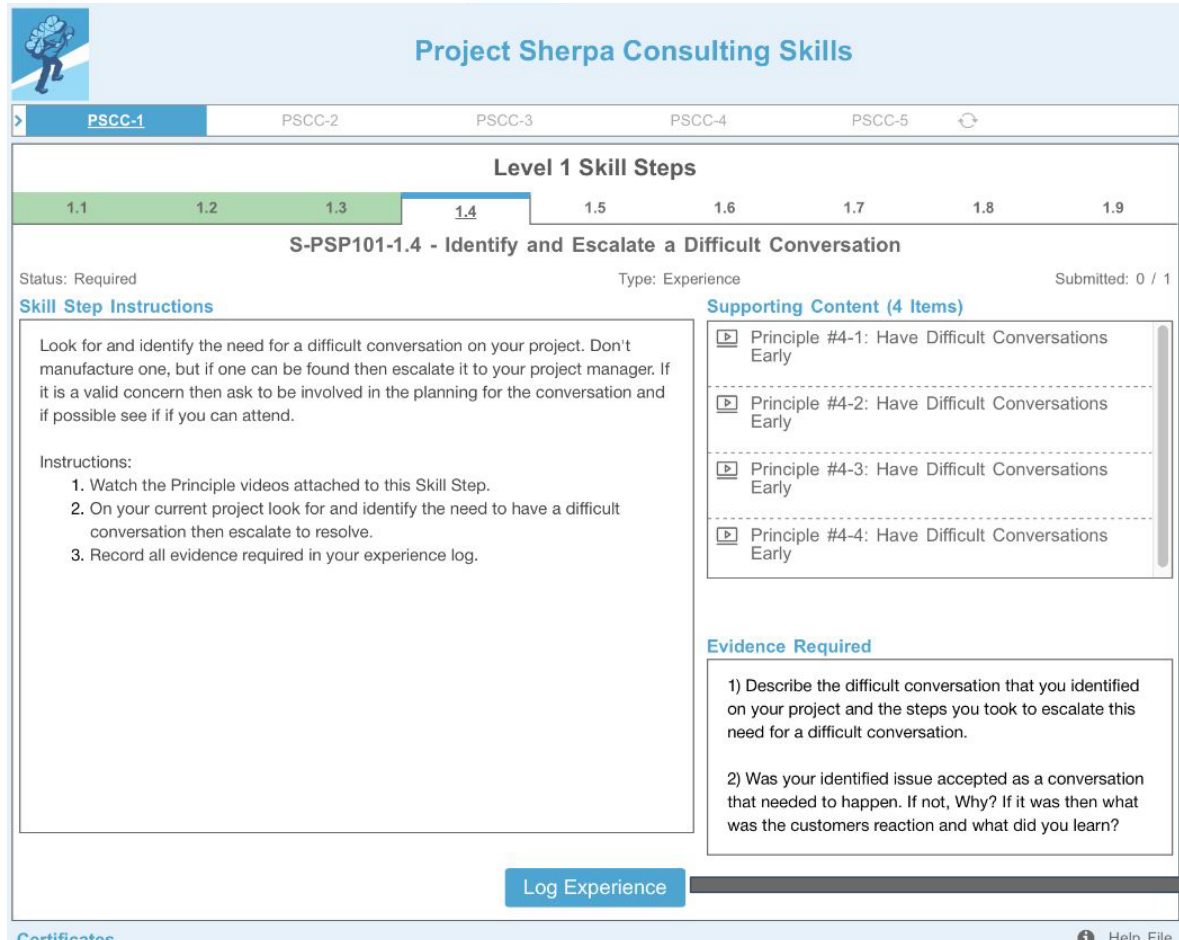
Support Services

Customer Success

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



Project Sherpa Consulting Skills

PSCC-1 PSCC-2 PSCC-3 PSCC-4 PSCC-5

Level 1 Skill Steps

1.1 1.2 1.3 **1.4** 1.5 1.6 1.7 1.8 1.9

S-PSP101-1.4 - Identify and Escalate a Difficult Conversation

Status: Required Type: Experience Submitted: 0 / 1

Skill Step Instructions

Look for and identify the need for a difficult conversation on your project. Don't manufacture one, but if one can be found then escalate it to your project manager. If it is a valid concern then ask to be involved in the planning for the conversation and if possible see if you can attend.

Instructions:

1. Watch the Principle videos attached to this Skill Step.
2. On your current project look for and identify the need to have a difficult conversation then escalate to resolve.
3. Record all evidence required in your experience log.

Supporting Content (4 Items)

- Principle #4-1: Have Difficult Conversations Early
- Principle #4-2: Have Difficult Conversations Early
- Principle #4-3: Have Difficult Conversations Early
- Principle #4-4: Have Difficult Conversations Early

Evidence Required

- 1) Describe the difficult conversation that you identified on your project and the steps you took to escalate this need for a difficult conversation.
- 2) Was your identified issue accepted as a conversation that needed to happen. If not, Why? If it was then what was the customers reaction and what did you learn?

Log Experience

- 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"**



Record Your Experience

378 / 1,500 char max. (min. 100 chars) Approving Manager: Shane Anastasi

In reading the SOW for my project I found that the customer has completely changed the direction of the project from its initial intent. They are now asking us to work with groups that have a far more complicated process than what was discussed in the SOW. I have raised this to my project manager and she is going to raise this with the customer at the next stakeholder review.

In the context of the program, was this experience of value? ☐ Yes ☐ No

Submit Experience Log for Review



Personalized Coaching in Seconds

W8safe, Jenny

1:1 Manager Review

W8safe, Jenny

Send Email

Date Submitted	Engagement	Reviewed
Sep-09-22	7	<input type="checkbox"/>

Engagement Score

7

Inquire and assist in re-engagement.

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

Add Comment>>

Provide feedback to

Recent Activity Click to Review

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

This Learner's Activity Trend

2
1
0
Jul

5 Year Vision

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

12 Month Goal

Be team lead within architecture team.

Mark as Reviewed

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

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

Wisdom collected from experiences, articles and best practices is instantly made available through AI inquiry.

Publish Your Wisdom back into the Content

Augment the standard training so that it becomes company-specific for future learners..

Consulting Skills

PSCC-4 PSCC-5

Steps

1.6 1.7 1.8 1.9

Customer Expectation

Type: Experience Submitted: 1 / 1

Supporting Content (3 Items)

- ▶ Principle #3-1: Manage Expectations
- ▶ Principle #3-2: Manage Expectations
- ▶ Principle #3-3: Manage Expectations

Summarize Our Collective Experience...

Evidence Required

Smart ASK Clear

Here are the key lessons learned from effectively resetting customer expectations:

- **Early Identification**:** It is crucial to identify misaligned expectations as early as possible. This helps in preventing escalation and sets a proactive tone for resolution. Address ambiguities in terminology and deliverables during initial discussions to avoid later confusion.
- **Clear Communication**:** Miscommunications often lead to misaligned expectations. Clear, concise, and frequent communication, particularly regarding scope changes and limitations, is vital. Use structured methods such as Statements of Work (SOW) for formal agreements and ensure all parties understand them.
- **Root Cause Analysis**:** Understand how misaligned expectations were created, whether due to marketing materials, assumptions from past experiences, or miscommunications during initial discussions.
- **Taking Ownership and Offering Solutions**:** Acknowledge gaps and offer solutions such as phased implementation plans, alternative methods, or custom

Project Sherpa Consulting Skills

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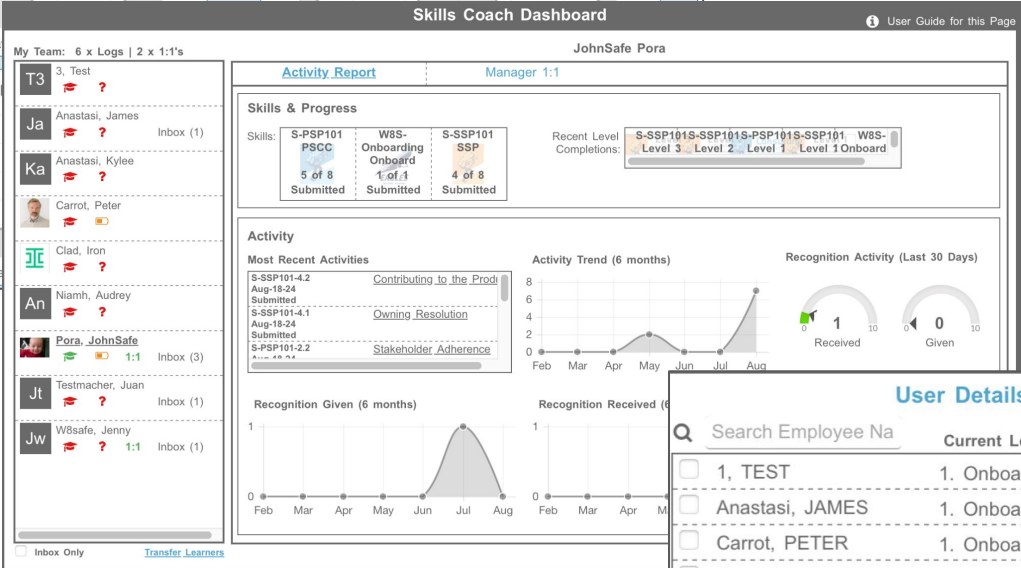
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- ▶ Principle #4-4: Have Difficult Conversations Early

Evidence Required

Monitor Learning at Scale



Admin



Managers




User Details (5 displayed)

Search Employee Na	Current Level	1	2	3	4	5	6	7	8	9	10	11	12	13	Last Step	Last Log	Target	Award
<input type="checkbox"/> 1, TEST	1. Onboarding	N	N	N	N	N	N	N	N	N					None	None	🎯	-
<input type="checkbox"/> Anastasi, JAMES	1. Onboarding	A	N	N	N	N	N	N	N	N					Aug-18-22	Aug-17-22	🎯	-
<input type="checkbox"/> Carrot, PETER	1. Onboarding	A	A	A	A	S	S	A	S						Aug-31-22	Aug-20-22	🎯	-
<input type="checkbox"/> Pora, JOHNSAFE	2. Competency	N	N	N	N	N	N	A							Aug-18-22	Aug-20-22	🎯	-
<input type="checkbox"/> W8safe, JENNY	1. Onboarding	N	N	N	N	N	N	N	N						Aug-01-22	Aug-01-22	🎯	-

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
	Kevin Stanley Director - Consulting North America kevin.stanley@smartsheet.com	80 / Enterprise Software <i>Professional Services</i>	<i>"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."</i>
	Jesse Dilanni SVP Professional Services and Customer Care jdilanni@veson.com	120 / Voyage Management <i>Professional Services</i> <i>Support Services</i>	<i>"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."</i>
	Chuck Archer Director - Services Program Management chuck.archer@insight.com	800 / Microsoft Solutions <i>Professional Services</i> <i>Support Services</i>	<i>"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."</i>
	Kristine Baugh Global Education Leader kris.baugh@se.com	300 / Management Software <i>Professional Services</i>	<i>"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!"</i>
	David Kelly EVP Professional Services david.kelly@kinaxis.com	400 / Supply Chain Logistics <i>Professional Services</i>	<i>"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."</i>

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

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

Please let us know if you have any questions.



PS Principles™

Thank You

PS Principles

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