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How to work with Consultants

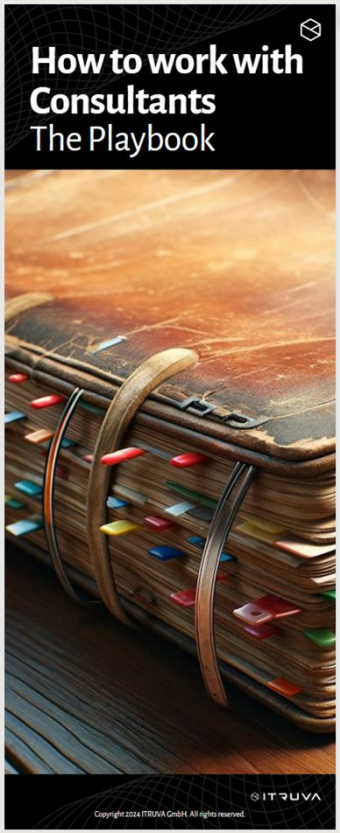
The Playbook

Working effectively with consultants can transform complex challenges into innovative solutions and significant business advancements.

Especially in a large transformation initiative such as an S4/HANA implementation, collaboration, working efficiently and effectively towards a common goal, is crucial.

By adhering the following guidelines, you can build a strong foundation for successful collaboration that drives mutual growth and achievement.

This playbook aims to **ensure a structured, transparent, and productive working relationship with consultants, maximizing the benefits for your projects and your organization.**



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6 Key Principles to guide you in effectively engaging and collaborating with consultants to **maximize the value of their expertise and support**

1 Clear Objectives



2 Roles & Responsibilities



3 Open Communication



4 Active Collaboration



5 Feedback & Adaption



6 Knowledge Transfer



By following these **principles**, you can enhance project outcomes and achieve your business goals more efficiently.

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1 Define Clear Objectives

- **Clarity of Goals**: Before engaging with consultants, clearly define what you aim to achieve. This includes specific project outcomes, milestones, and deliverables. Clearly highlight the contractual agreement and its impact on day-to-day project work.
- **Share Vision**: Ensure that consultants understand not just the task at hand but also the larger business objectives and how their work fits into your strategic vision.

C-Level commitment and sponsorship communication on strategic guidelines

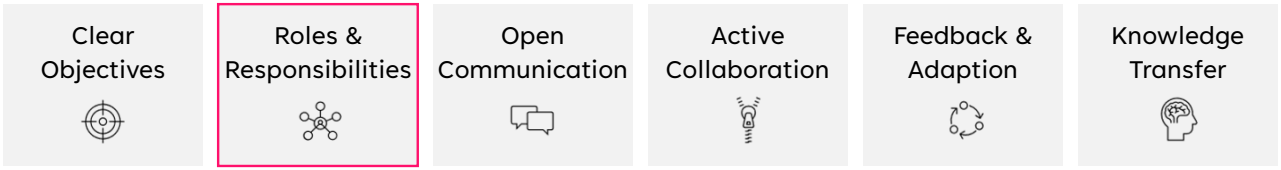
Clear Objectives	Roles & Responsibilities	Open Communication	Active Collaboration	Feedback & Adaption	Knowledge Transfer
					

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2 Establish Roles and Responsibilities

- **Clear Roles**: Define and communicate everyone's roles and responsibilities from the outset to prevent overlaps and ensure accountability. Establish a RACI (responsible, accountable, consulted, informed) matrix to refer and visualize the mutual agreement.
- **Respect Expertise**: Acknowledge the consultants' expertise and let them lead in their areas of specialization while maintaining oversight.

Make sure that everyone understands their role and the impact of the contractual and financial agreement on the project approach



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3 Foster Open Communication

- **Regular Updates:** Set a cadence for regular meetings and updates. This could be daily, weekly, or bi-weekly depending on the project's intensity.
- **Transparent Sharing:** Encourage an environment where both successes and challenges can be shared openly. Focus on honest feedback and naming the 'elefant in the room' mentality without blaming or condemning. Focus on solutions and not on finding the culprit.

Communication is paramount

Clear Objectives	Roles & Responsibilities	Open Communication	Active Collaboration	Feedback & Adaption	Knowledge Transfer
					

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4 Engage in Active Collaboration

- **Work as Partners:** Treat consultants as partners rather than vendors. Involve them in decision-making processes and strategy discussions. Assume everyone is trying to help and deliver a great job in their day-to-day work.
- **Leverage Tools:** Utilize collaboration tools that facilitate sharing documents, timelines, and feedback efficiently and securely. Establish tools right from the start to take advantage of learning effects and avoid costly and time-consuming changes due to problems later on.

Respect your partner who is rowing in the same boat

Clear Objectives	Roles & Responsibilities	Open Communication	Active Collaboration	Feedback & Adaption	Knowledge Transfer
					

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5 Provide Feedback and Adapt

- **Constructive Feedback:** Offer timely and constructive feedback. Be specific about what is working and what is not. Name the “elephant in the room” and eat it up calmly – peace by peace.
- **Flexibility:** Be open to adjusting strategies based on consultant insights and changing project dynamics. Ask consultants openly for advice, experience and know-how from similar projects and listen to them - after all, that’s what you’re paying them for.

Name the elephant in the room



Clear Objectives	Roles & Responsibilities	Open Communication	Active Collaboration	**Feedback & Adaption**	Knowledge Transfer

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6 Plan for Knowledge Transfer

- **Documentation:** Ensure that consultants document their processes and insights gained throughout the project.
- **Training Sessions:** Schedule training sessions where consultants can transfer knowledge to your team, ensuring sustainability after the project ends.
- **Post-Project Reviews:** Conduct meetings to discuss what went well and what could be improved. Both the internal team and consultants should participate.
- **Continuous Improvement:** Use learnings from each project to refine future engagements and internal processes.

Document and review not only at the end of your initiative to be able to create and ensure the desired quality and the adequate format

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Follow the 3 steps approach when implementing the playbook, customize the scope to your needs

Non-exhaustive illustration

Preparation Phase	Execution Phase	Closure Phase
Review the project scope and objectives with the entire team	Engage in regular check-ins and status updates	Conduct a final review and approve all deliverables
Establish communication protocols and tools	Adjust roles and responsibilities as needed based on project evolution	Organize a knowledge transfer session
Confirm project timelines and milestones	Ensure that consultants have the resources and support they need	Gather feedback from both teams to assess the collaboration

Celebrate the results and the successfully achieved milestones, socializing within the team is still an important success factor for any initiative.



Facilitate a workshop with the entire team **prior the actual project** work starts.

Build a strong foundation for successful collaboration that drives mutual growth and achievement.

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Unlock Your Project's Potential with ITRUVA

As you embark on your next journey, don't leave your success to chance. Join leading organizations who choose ITRUVA to elevate their projects from good to extraordinary.

Whether you're at the inception of a new project or navigating through ongoing challenges, our expert coaching, dynamic workshop facilitation, and steadfast program and project management support are here to guide you every step of the way.

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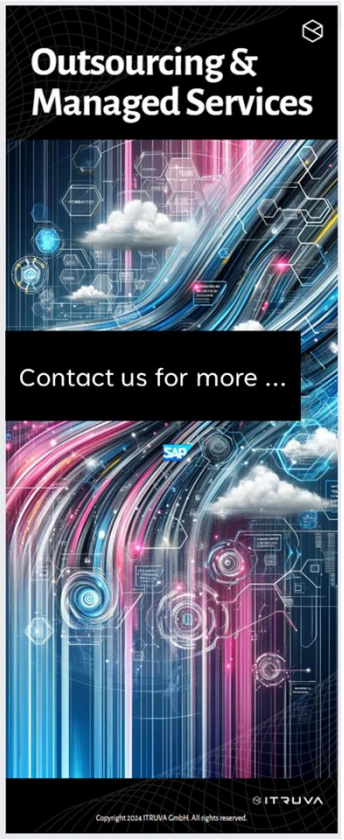
Take Action now!

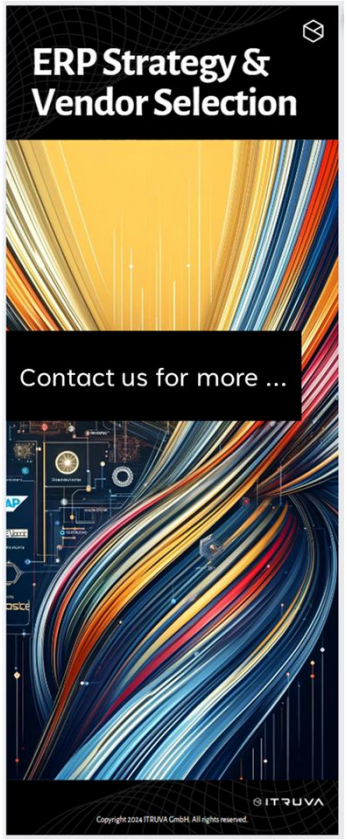
Enhance your team's capabilities, streamline your processes, and achieve outstanding results.

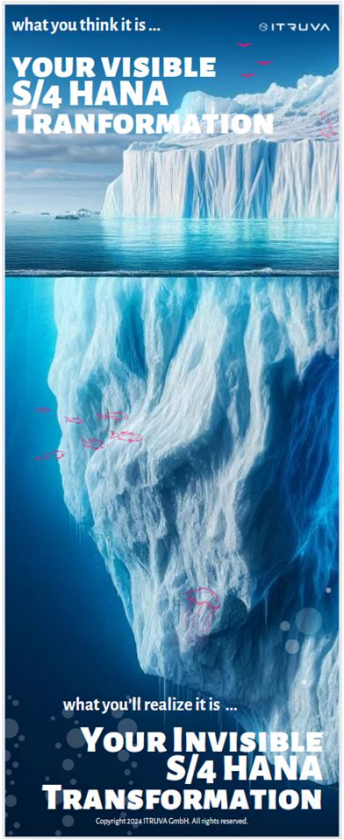
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ITRUVA GmbH
Otto-Heilmann-Str. 17
DE – 82031 Grünwald

value@itruva.com
+49 155 6660 4350
www.itruva.com | www.itruva.de

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