



SmartWisdom®

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Manage Knowledge, Control Events, Influence People, Achieve Results

‘Big Four’ Survey:

The Client and Colleague Experience

June 2008

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SMARTWISDOM EVALUATION

Twelve ‘Big Four’ SmartWisdom users were interviewed and asked how SmartWisdom (SW) helped with either their client or colleague experience.

FOUR QUESTIONS

Everyone was asked the same four questions:

How does SW help you...

- 1) Add value to clients or colleagues?**
 - 2) Think in the mindset of clients or colleagues?**
 - 3) Share and collaborate?**
 - 4) Invest in relationships with your clients or colleagues?**
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TWELVE PARTICIPANTS

The level of experience in using SW ranged from approximately ten months to three years. The participants who took part in the survey were:

- Project Manager
- Manager
- Manager
- Senior Business Development Manager
- Department Head
- Department Head
- Senior Manager (Zurich)
- Strategy
- Business Relationship Manager
- Project Manager (Global)
- Manager (Central Eastern Europe)
- Business Development Manager

OVERVIEW

At first glance, SW appears merely to be a different way of taking notes and planning. In fact – and as independent scientific study has proved – SmartWisdom is an effective *knowledge management* tool for practical, day-to-day business tasks: The better one is able to manage knowledge, the easier it is to control events, influence people and achieve results. How this relates to Client and Colleague Experience – and specifics on **how SW has helped users** – is highlighted in this summary of the 12 interviews.

Add more value

- Take control of and deal with challenging meetings / interviews
- Ensure conversations are more structured
- Bring people back on track
- Better understand the bigger picture
- See more patterns in conversations
- Challenge more effectively and constructively what has been said
- Clarify and confirm what is being discussed
- Give immediate feedback and display a clear understanding during the meeting / interview itself

Think in the mindset

- Focus longer and listen better
- Analyse more effectively what is being said *as* it is being said
- Allow conversations to flow at the client's pace, yet still remain in control
- Spot the keywords a client uses – and use their language
- Identify salient points
- Ask the questions that help people think through and further about what they are actually saying, and its implications

Improve sharing and collaboration

- Be more in the moment and maintain better eye contact
- Make conversations more fluid
- Distil complex issues into their underlying – and simpler – logic
- Achieve superior recall of information and find historic information faster
- Write up minutes / notes in 50% less time
- Share information faster after meetings
- Create clearer and more concise summaries
- Ensure information is more complete and better structured

Invest in relationships

- Be – and appear – more innovative, creative, perceptive, confident...
- Master an easy-to-use method for building rapport
- Make the initial connection more relaxed
- Open conversational dialogues that are not business related
- Encourage the attention, natural curiosity and genuine interest of a client
- Differentiate yourself from others, and be better remembered
- Impress clients – particularly your recall of earlier conversations
- Increase confidence and trust with your understanding of client business

Q1 - How does SW help you add value to clients or colleagues

Participant 1: Historically I would write reams. At the end of a meeting I would sometimes excuse myself while I paused for a few minutes before giving feedback. At other times I would go away, figure out what had been covered, summarise it and then go back to the client. With SW I am now able to give immediate feedback, display that I have clearly understood what has just been discussed and have captured all the actions. This feedback is definitely more concise as well.

SW helps me to be disciplined, better organised and to write more succinctly. I find it assists me to plan an agenda, add to it and makes it easier to capture information. This means meetings run more smoothly, are faster – and therefore do not waste my client's time. It is also clear that the meeting has been well prepared for and thought through. As all my information is now kept in one book and most meetings fit onto one sheet of A4, it is easier to refer back to previous notes during a meeting.

Participant 2: I do a lot of coaching and SW enhances my ability to be there in the moment. It enhances active listening, the capture of my clients' thoughts and the challenging of what has been said throughout the whole of a coaching session. Having all my notes on one page (which is not possible with linear notes) makes a big difference. The SW format gives me a quick reference point, everything is very clear and it completely reminds me of the meeting, the conversations and action points. As my coaching style is reflective, SW enables me to work more effectively and to provide feedback more during a meeting because the information can be so easily referenced.

Participant 3: There was one specific instance at the end of a meeting two colleagues I had been working with started to discuss between themselves a new project they were about to start work on. I had been at a conference a few days earlier, which had key information relating to the work they were about to undertake. As I talked to them I flicked through my SmartWisdom file to the relevant information and was able to give them specific statistics and further contact information. They were grateful for the information and impressed with how I had managed to find the information so quickly. As a result of my interjection, the project is more likely to be effective as they are developing a solution which will take into account the research findings of Harvard University.

Personally, this has strengthened my relationship with my clients as they see my knowledge in a broader context than Centra.

Where I get the chance to use the planning technique before a meeting I find the conversations are more focused and robust. Sometimes SW also helps me to consider options that may not have arisen otherwise.

Participant 4: My role is all about facilitation, helping people to do and see things differently. SW helps me to take an overview of what is being said, stand back and see what the key issues are. I work with people who like detail and specifics. I need to challenge them as to whether we are doing something for the sake of doing it – or: is there a commercial imperative.

Q1 - How does SW help you add value to clients or colleagues? (cont)

Participant 4: (cont) Above all SW helps me to see the key trends, themes and what has been missed. It also helps when working with clients who have many issues going on simultaneously. SW makes it easier to capture their stream of thoughts, look at the cause and effects, help them think through their issues, the options available and the ramifications.

Participant 5: During meetings I find it much easier to identify the key words and key headings compared with traditional linear note-taking. With the recap at the end, it is clear that I have been able to pick up on what they were saying and this was commented on by one client.

Participant 6: My meeting notes are now very fast to go through. They are easier to skim and find relevant information, and this can be done during a meeting without interrupting the flow. This is also helped because I combine using SmartWisdom with using a Tablet PC. There was an example when I was with a colleague and a supplier. The supplier claimed we had agreed to do certain things that we hadn't. I was able to support my colleague by finding the relevant meeting and information very quickly and recalling exactly what had been said there and then.

I suffer from Dyslexia, which can be triggered when under pressure. Linear note-taking used to be a nightmare. When I was recording conversations there was a tendency to switch off, concentrate more on the writing and miss out on the conversation itself. Sometime the notes would be fine; at other times they would be incomprehensible and I might lose up to half of what I had written. SmartWisdom definitely makes note-taking easier for me – I find it works as my brain works. It also helps me recall information using the prompts. I wish I had this at university – it would have made life so much easier.

Participant 7: The biggest advantage for me is that SW helps with listening, it forces me to think through issues and allows me to make connections. It is more enjoyable to use, as I feel I am partaking more. SW is also really good for documenting everything, including those things that may not get typed up, such as short conversations and phone calls.

Participant 8: The overarching benefit of SW is that it helps to synthesise and bring clarity to information in meetings and when doing research from multiple sources.

Prior to a meeting, the SW planner is very quick for identifying what needs to be covered and when. It helps me to think through things in depth, to think wider and give my thoughts a logical structure.

There was one particular occasion where I was working with a client on a very sensitive turnaround. We attended a meeting with a lawyer who was representing the other party. Almost straight away the lawyer started speaking very fast, jumping around, saying there were a number of issues to cover and not covering them.

Q1 - How does SW help you add value to clients or colleagues? (cont)

Participant 8: (cont) He was deliberately trying to muddy the water and use his knowledge as power. After about 10 minutes of this my client was getting increasingly disorientated and frustrated. Because we had used SW to plan through the meeting beforehand – and I had used it throughout the ten minutes of this lawyer talking nonstop – I was able to come in, deconstruct what he had said and clearly point out to him the misinformation and contradictions in what he was saying. This immediately brought clarity to the meeting, and the lawyer was forced to engage and have a conversation with us as equals. The client was impressed.

Participant 9: Quite often in meetings with clients the conversation wanders off the main topic and goes off on tangents. On one particular occasion the client lost track of the main topic of the discussion, but with SW not only had I been able to keep track and manage the flow of information, which was steering in different directions, I was also able to clearly recount what had been covered so far and bring the client back on track. This would have been very difficult if I had been using linear note-taking.

The meeting planning technique within SW is extremely useful. I use it regularly to prepare for meetings in a smart efficient manner. As the information is broken down clearly and everything is kept on one page, it is very easy to see where I am in the conversation and mentally tick off the topics for discussion and what has already been covered.

Participant 10: Using the documentation technique allows me to listen and record information far better than before. This means that I am better able to respond to what colleagues are saying and there is greater potential to spot questions or ideas that may not have been considered otherwise.

Participant 11: SW helps me to see the patterns in what people are saying. There is more time to analyse the information and it is easier to pick-up on questions during the meeting itself.

There was one workshop where I was keen not to go down a traditional route of a series of PowerPoint presentations. I used the SW planner to quickly gather my thoughts, break down the complexity, identify alternatives and pre-empt issues. It was very fast to do. The result was a process improvement workshop and the feedback afterwards was that it had been much more useful than usual workshops, and people had learnt new skills.

Participant 12: SW saves time and effort. Conversations are more structured and the meetings more focused. With the way SW structures notes it is easier to see how information links together and to identify further links.

In meetings, particularly those with partners, it is easy for me to clarify and confirm what has been said and the actions. I feel they appreciate this. It helps me to deliver what is wanted and needed by the stakeholders.

Q2 - How does SW help you think in the mindset of clients or colleagues?

Participant 1: I am not sure it does directly. However, what SW does do is allow me to spend more time listening rather than trying to capture everything said and writing spurious notes that had to be analysed afterwards. This extra time allows me to focus more, analyse what is being said as it is being said and to spend more time asking what the issues are and finding out where they are coming from.

Participant 2: SW encourages me to plan and I find it the best way to prepare for both coaching and meetings. SW makes it very easy to plan in advance and although I could have an agenda, SW forces me to think through things more logically and sequentially. It puts information in a format that appeals to the structured mindset of many of my clients, which is important; it also makes it much easier to facilitate the meeting.

Participant 3: The combination of the planning and note-taking technique increases my ability to question. When using SW, the information recorded is more structured and logical than linear note-taking, making it easier to refer back to notes when consulting with a client. I can use the client's language, increasing their confidence in my understanding of their business. It definitely helps to ensure – everyone is on the same page.

Participant 4: It highlights the key words that a client is using and repeating. Because SW requires me to process the information more, this enables me to be more analytical about what I am hearing. It also helps to keep conversations going. I can let the client flow with their conversation, knowing that when it is appropriate I can go back and cover the points I want to cover. This means the meeting is not running to my agenda but more to their agenda.

Participant 5: I often have to write up my notes, and because everything is on the same page, it is easier to have a high-level view, the information is a lot clearer and the story is much easier to follow.

Participant 6: As I am not recording sentences, it means that I have to record less and am able to listen more.

Participant 7: For myself, SW doesn't help me to get into their mindset. What it does do though is to help me identify the salient points and free my mind to use that information. It also frees my mind from concerns that I may have missed something. Because everything is on one page, SW helps to show me what has been covered and what is still outstanding. With linear note-taking, I don't have the same level of control, there is a tendency to cognitively switch off and it can end up being a bit like taking notes at university.

Participant 8: By dint of using SW, it forces me to engage with what is being talked about, to think it through and ask questions. It allows me to see patterns as the meeting unfolds and expand on what is being said. Because everything is on one page, it is easy to see what is covered, what the key issues are and what needs to be clarified.

Q2 - How does SW help you think in the mindset of clients or colleagues? (Cont)

Participant 9: The SW method helps to prompt more questions within meetings, and ideas are captured naturally as the conversation extends. This makes meetings more engaging and conversation more fluent in a natural way.

Participant 10: The method of recording information means that I listen far more effectively, allowing me to better understand where the clients are coming from.

Participant 11: I find using SW for recording conversations brilliant. Because my notes are less wordy, this allows me to really listen properly.

Participant 12: Overall it is the greater clarification and transparency. It is easier to help people to think further about the information they are giving me and what is being discussed. I use the SW question, 'what is this all about', to constantly ask myself about what is being said.

Q3 - How does SW help you share and collaborate?

Participant 1: I believe that listening is a key skill when sharing and collaborating. SW gives more time to listen. After the meeting it definitely speeds up the writing of notes and facilitates the making of a clear and concise summary.

Participant 2: A core skill for coaching is active listening – also being in the moment, sensitive to body and verbal language and maintaining eye contact. SW enables me to do these better. The dialogue is much stronger and the interaction comes across as seamless and not disjointed. It is easier to share what I am hearing in terms of what they are saying, their issues and problems. With linear note-taking there is a loss of eye contact, it slows me down and it is hard to write, listen and analyse at the same time. The SW notes are a great record for follow-ups both during and post meeting.

Participant 3: I find it very quick to go back to previous notes, find the information I am after and share it without a break in the conversation.

Participant 4: My recall is much more factual and the SW notes are much more concise and a good basis to work from. My linear notes used to be too long and waffly. I find it is very quick to write up the SW notes, typically a one-hour meeting takes me about 20 minutes to write up. Before, I wouldn't have written them up. It would have taken up too much time and seemed just too difficult to try and disseminate what had been said and put it all together in a logical format. Colleagues have noticed that I do now write up notes from meetings. These notes help when going back to see a client again, as we have more background information and are building the relationship more on a relationship block as opposed to a technical block.

Participant 5: The planning system enables a more flexible approach to a conversation. You can deal with things as they naturally arise without interrupting the flow and it is easier to see what questions have been covered and what needs to be done.

I have been involved in a number of interviews that require two stages. I would be involved with someone from recruitment on the first interview and would then hand over to the relevant manager for the second interview. Using SW I found it very easy to quickly turn around the information and give a comprehensive and detailed briefing of any concerns and issues to make sure there were no surprises. The managers were then up to speed and were comfortable moving forwards with the next stage.

I notice that using SW there is a smoother flow in conversations. With someone using traditional note-taking there can be a broken conversation. The interviewer will ask a question, listen and then record. With SW it is much faster with fewer breaks because you are able to question and listen as you write.

Participant 6: I either pass information on verbally or written up as notes. SW is much easier to use for this and the recall is better. Compared with linear notes, there is a noticeable difference. I think it is because of the active process of listening for salient points.

Q3 - How does SW help you share and collaborate? (cont)

Participant 7: After a meeting, because my notes and understanding are more complete, these help me to better structure and share my thoughts. I have also used it a few times with others for facilitation. It is more exhaustive and helps people think through ideas.

Participant 8: The SW telephone system has been particularly useful in my day-to-day activities. The system helps me plan a call and capture the salient points in the conversation. All the information I need, including the name, phone number, organisation, conversation plan and response are all in one place, which makes it easy to use and return to for reference.

SW makes it easy to highlight important points as one goes along. The information is captured in a clear and quick-to-find format, which makes summaries in meetings and writing minutes afterwards more efficient.

Participant 9: The way the book is laid out means that I can scan my notes easily to find relevant information. The information needs less filtering, my recall is better and often it is possible to remember the actual meeting itself in detail. The turnaround time on minutes and notes is faster too, and if for any reason I can't do my notes immediately after a meeting, the recall is still good over time.

Participant 10: Preparation time for gathering thoughts is shorter. SW planning helps to make complex issues simpler, the information is more distilled and logical and it is easier to see alternatives. Giving feedback post meetings is faster and more succinct.

Participant 11: Quite often it is appropriate that only one of the team members attends a meeting. So there are many instances where I have to update my team as to what has been said and the actions. I find SW very useful. The information is at my fingertips, the feedback is very structured and I can quickly describe what is relevant. With linear notes there isn't the structure, the information jumps around from one topic to another and one doesn't always get all the key points and actions.

Q4 - How does SW help you invest in relationships with your clients or Colleagues?

Participant 1: My clients are internal, and in a funny sort of way SW did help as people would watch me using it and then ask what I was doing, and the conversation was relationship building. Being seen to use SW was also positive because IT were seen to be doing something different and innovative.

Participant 2: I work with a lot of people, and building trust is very important. SW enables me to better deal with this high volume of clients. I might meet six people in a day, and SW helps me to stay in the moment, which helps me build relationships of a higher quality. I can invest more in an individual because it is so easy to refer back and see what they have raised, their concerns and issues. When I meet someone for the second time they are often amazed as to how much I am able to play back to them from the previous meeting. I think SW helps me to show that I have a genuine interest in my clients and their development.

Participant 3: Same as point 1:

Participant 4: I think it can be good as an icebreaker, though I have had some negative comments. I had one instance where I was working with one senior client (who tends to be a bit abrupt anyway) who thought I was doodling. He stopped the conversation and asked what I was doing. I explained about SW and in the end he thought it quite interesting.

Participant 5: During meetings and interviews I am able to pay more attention and there is greater eye contact, which gives the appearance of greater interest.

Participant 6: SW helps me to engage more, and the conversation is less likely to dry up and have awkward silences. Where I have got something, it helps me to drill down. It is easier for me to see when everything is complete and say that I have got all the points. I think it is also easier for the person opposite to see that everything is complete as well. SW looks more professional – rather than trying to thumb through five sheets of paper, everything is on one sheet. It is certainly a talking point and helps to break down barriers. I also believe it earns some kudos. People are interested in how and whether it works or not. I think our industry is seen to be a bit dull at times, and using something like SW seems quite creative. I believe there is a positive association, though I recognise it would be quite difficult to measure the actual benefits.

Participant 7: In an oblique way the SW weekly planning system helps because it is a good way of scheduling time for others. SW stimulates a lot of curiosity and interest and there is a perception that it is all rather clever.

Participant 8: SW is an icebreaker in meetings where individuals that have not been exposed to the method comment on the template, note taking and how it works. This allows a dialogue with a client or colleague to open, which is non-business related and helps to start to build a rapport with them. Quite often people ask how SW works, and I give them a quick overview of the system, the benefits and my experience of using it. They tend to be impressed at how the planning system, meeting notes and phone calls are all combined together in one notebook.

Q4 - How does SW help you invest in relationships with your clients or Colleagues?

Participant 9: Sometimes they want to see how easy it is to recall information, so I choose a page at random and can immediately tell them what the meeting was about, the flow of the conversation and the actions out of the meeting. The ease at how the information is recalled has received positive comments on a number of occasions.

Participant 10: Strangely enough, although it is a small thing it can sometimes help to build rapport. It is a nice icebreaker when you meet people as they are always curious about the book and note-taking technique. So in situations where I am meeting new people and it might have been awkward to strike up an initial conversation, using SmartWisdom often helps to make that initial connection easier and more relaxed. People also remember you for using it as well, they are genuinely interested and often ask how it is going.

Participant 11: When responding or giving feedback it is easier to use the client's own words and the reaction to this can be very powerful. It is also clearer when there is ambiguity, where or who the source of that confusion is (historically, I might have suspected it was myself, especially if I hadn't really understood the conversation in the first place).

I think SW really comes into its own when you need to have that difficult conversation, particularly when you are dealing with people's emotions and vested interests. I found being able to summarise the concerns around the table and recount them during several stages of a tough change programme was really seen as a bonus. Even the most harden cynic was pleased that I had listened to them and understood their issues.

Participant 12: SW raises a lot of interest. People see that I can go back and easily recreate what has been talked about, and I am often asked about it. I describe SW's biggest benefits as the ability to easily clarify and confirm what is being said. I think this could also be useful back home in Russia to help structure and explore what is being said in meetings.