CHAPTER 5
BUILDING SUSTAINABLE RELATIONSHIPS

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Stakeholders

Complex organisations have a wide range of stakeholders with an interest in their progress. Whatever academic enterprise initiatives you undertake will have an impact upon individual stakeholder interests. Figure 27 analyses the various stakeholder constituencies in relation to knowledge exchange, and examines their roles and desires.

Figure 27: Analysis of knowledge exchange stakeholders

	Stakeholders	Desire
Funders	Higher Education Funding Council for England	High levels of successful completions
Funders	Research Councils and Charities	New knowledge successfully used
Learners	Undergraduate	Professional skills leading towards employment
Learners	Post Graduate	Leadership skills and career progression
Learners	Research	Job experience of a career in academia
Learners	Part time	Personal and professional development
Learners	Mature	Personal and professional development
Learners	Non-award bearing	Personal and professional development
Learners	Full time	Learning to live and work independently
Learners	Traditional	Learning to live and work independently
Learners	Domestic	Learning to live and work independently
Learners	Overseas	An immersive cultural experience
Learners	Alumni	Beneficial relationship with a reputable institution
Colleagues	Governors	A reputable institution, soundly financed
Colleagues	Executive	A reputable institution, soundly financed
Colleagues	Deans/Heads of School/ Heads of Department	Consistently improving performance, within budget
Colleagues	Principal Investigators	Generating work of international significance
Colleagues	Peers	Interesting work that wins recognition
Colleagues	Your Team / Administration	Delivering commitments effectively and efficiently
Colleagues	Services (eg Registry, Quality, ICT, Finance, Personnel, Knowledge Exchange Office,	Delivering commitments effectively and efficiently
Colleagues	Facilities (e.g. Accommodation, Security, Cleaning, Catering, Grounds)	Delivering commitments effectively and efficiently
	Employers (Private, Public and Charitable sectors)	Capable employees with high potential. New ideas, expertise and technologies.
	Local Community	Growing prosperity without too much disturbance
	National and International Media	Scandal, disharmony or ground-breaking discoveries
	Local Media	Success stories
	Trades Unions/Students Union	Fair dealing in a national context
	Suppliers/Creditors	Sustainable business partnership
	Competitors	Low quality, high cost, poor service, failure to innovate

This deliberately jaundiced analysis is designed to get you thinking about the different stakeholders. Your own views may differ widely from those stated above, as will everyone's as we will always approach the challenge of stakeholder analysis from our own unique perspective. Now the question becomes "How do we reconcile a large number of different priorities without losing the essence of our initiative?" For this we can use the Power/Interest Matrix (Gardner, et al, 1986) model in Figure 28.

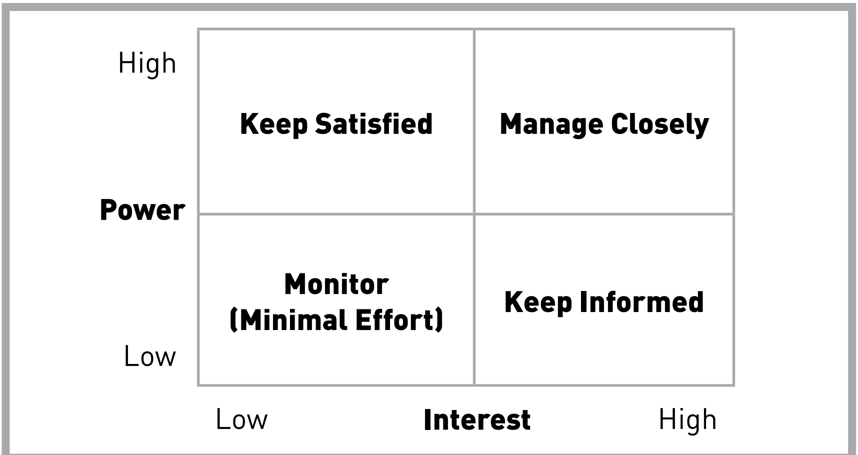

Figure 28: Power/Interest Matrix (Gardner, et al., 1986)

To understand how this model works in practice, you need to ask yourself the following questions: "What interest does this stakeholder have in what I do on a daily/weekly/monthly/annual* (*select as applicable) basis?" putting the stakeholder at the appropriate stage of the horizontal axis. Repeat the question for the Power axis and this will help you to place the stakeholder in the appropriate box of the matrix. Figure 29 provides an example matrix drawn from the assumptions in Figure 27 from a monthly perspective:

Power / **Interest**	Low	High
High	**Keep Satisfied** Funders	**Manage Closely** Colleagues, Employers, Competitors
Low	**Monitor (Minimal Effort)** Media, Unions, Suppliers/Creditors	**Keep Informed** Learners, Local Community

Figure 29: Power/Interest Matrix (Gardner, et al., 1986) – worked example

How to avoid working for free

When working with commercial clients for the first time, many academics experience the feeling that they are expected to work for free to prove themselves before the client will consider fee-paying work. This is not true. Although commercial clients may not appreciate being presented with a list of chargeable services at first meeting, before the relationship has developed to the stage where it can deliver value for both parties, they do expect to pay a reasonable fee at some point. Nevertheless, it can feel distasteful talking to a client about money and can greatly affect your performance as you are trying to juggle multiple responsibilities and are reluctant to over-commit yourself to a client you don't know. Here are some tips:

Ask questions (don't jump to give answers).
At this point it helps to think like your family doctor. If you visited your local GP and just asked for a course of antibiotics, it is unlikely that he will comply by dutifully completing a prescription and handing

it over. Instead, he or she will ask you questions that relate to your medical history, that of your family, your lifestyle, and details of the pain you are suffering. By putting these clues together he or she can determine a proper diagnosis rather than allowing you – who may be unqualified to do so – to determine your own course of treatment. A similar consultative process takes place when you work with a commercial client. The client approaches you, the expert, for your help in order to take away some pain in their organisation. You should not rush to deliver precisely what the client requests without knowing enough to inform this decision. Otherwise, you are endorsing a course of action that may be wholly inappropriate and possibly counter-productive. Subsequently, when the client comes to evaluate the effectiveness of the course of action you sanctioned, they will attribute its failure to your lack of skill.

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Build demand (investigate the scope and scale of the problem). By asking questions of the client prior to recommending a course of action, you are also making the client aware of the range of support you can offer. They may not previously have been aware of this so by conducting research into the problem, you are reinforcing your credentials and sowing the seeds for potential future work.

Give qualified consultancy (without knowing the full story).
The client may not appreciate an extended quiz before you determine whether you can help them. It bodes well for the future relationship if the client is prepared to answer even a few questions,

impatience could interfere with a successful completion of the project

as this indicates that they may be prepared to consider the advice that you give them. Clients who will not entertain questions and simply want you to quote may be troublesome, as their impatience could interfere with a successful completion of the project – and this will reflect badly on you. To retain the client's interest, you could consider giving some qualified advice and tips of the things you could do to help them that may lead to a successful resolution to their problem. Skillfully used, this tactic can tempt the client into answering more of your questions as a happy resolution begins to be revealed to them, if only they could give you more information.

Arrange to meet for a formal discussion.
Chance conversations at events or by telephone do not give a full opportunity to understand the client. Body language is a crucial component as the words that they use are augmented as a message by gestures, posture and facial expressions which will either reinforce or contradict what they are saying. Observe the client's body language when you are speaking, in order to gauge their approval or disapproval. Responding to this additional information will help you to reach a mutually beneficial result.

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Chance conversations at events or by telephone do not give a full opportunity to understand the client. Body language is a crucial component as the words that they use are augmented as a message by gestures, posture and facial expressions which will either reinforce or contradict what they are saying. Observe the client's

body language when you are speaking, in order to gauge their approval or disapproval. Responding to this additional information will help you to reach a mutually beneficial result.

Meet for a formal discussion.

This allows dedicated time for you both to discuss the challenge. Both parties will automatically understand that the discussion is now on a value-for-money footing, where both parties will invest resources (typically time and money) to resolve the client's problem.

Provide a sample service programme.

When asking questions to diagnose the problem, you are taking the client through a world of possibilities. It will help them greatly if you could provide a sample of the type of work you could undertake. This helps the client to envisage how you will work together and what value you will add. This needs to be no more detailed than one or two pages to help frame the client's expectations. It may even be a case study of a previous successful project.

Propose a pilot.

If you've never previously worked with a client, you should be cautious until you understand their working style. Does the client pay their bills on time? Do they give you clear and timely information to aid your progress? Are they easy to get hold of to answer ad hoc queries? Do they have clear authority to lead the initiative in their organisation? Answering "no" to any of these questions can lead to a stressful working relationship. Assuming that the client is impressed with how you have approached the problem and is willing to engage you to undertake the work, you should begin with a low-cost pilot phase for two reasons:

- If the client is not right for you, or you are not right for the client, then both parties can find out quickly and dissolve the relationship with comparatively little loss.

- A smaller, less costly, project is easier to get approved than a long and expensive engagement. By making a success of the pilot you are in a good position to expand the work you do for the client.

do they give you clear and timely information to aid your progress?

Building a client base

At this point it is worth examining the key attributes of successful sales people:

- **Commitment –** get used to 'no' as you'll hear more of those than 'yes'
- **Healthy ego –** not 'over the top' and not a 'shrinking violet' either
- **Listening skills –** you have two ears and one mouth so use them in that proportion
- **Sense of humour –** the self-deprecating sort is best as you can only offend yourself
- **Enthusiasm –** if you can't get excited about what you do, why should the client?
- **Product knowledge –** must be second to none as you are pitching yourself as an expert

These skills will help you to win enough trust to persuade a potential client to give you a trial order.

Winning credibility via a pilot

Even if you think the pilot programme went well and was delivered to plan and within budget, take time to sit down with the client to identify what went well. This is not seeking an appreciative pat on the back, but is more about hearing – in the client's words – the benefits they felt that they had received from working with you. You may be surprised to learn of the unexpected benefits that did, or could have, accrued. It is good practice to encourage the client to talk about how the engagement could be improved. Be careful not to apportion the blame for what went wrong – you are undertaking this reflection activity as a partnership. Areas for improvement typically include communication, responsiveness, accuracy and team working. Don't be discouraged if this is a rather long list, as it will take time for the styles of both parties to synchronise and operate at their full potential.

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After winning that first order from a client, provided that it went well and both you and the client wish to continue working together, your thoughts will turn to translating that success into a broader growth of your activities. It is your objective, through a series of highly successful projects, to build the relationship in line with Figure 30.

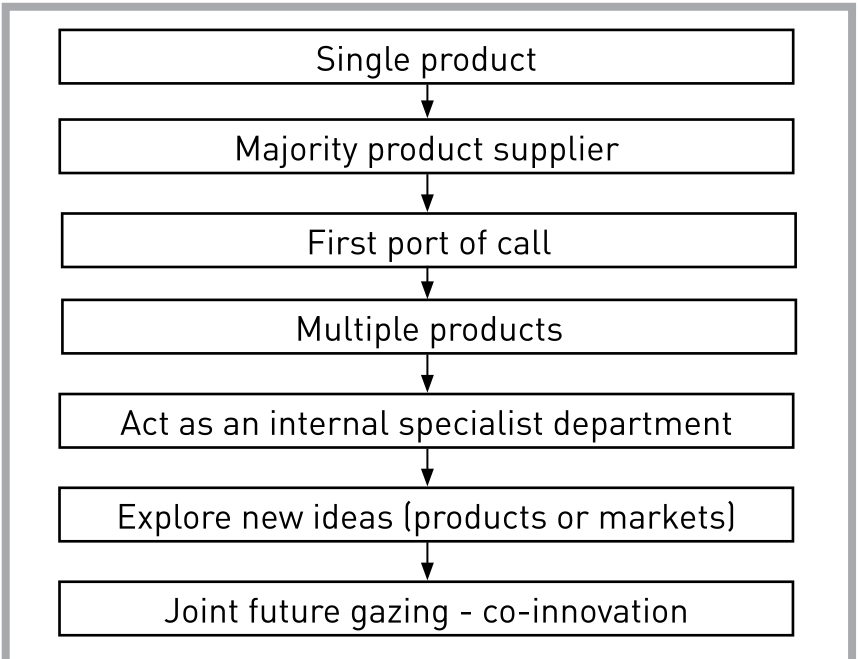

Figure 30: How relationships grow

Ask for a testimony and referrals

Don't wait until the engagement has ended to ask for these.The client knows that you are both in business to generate benefits for your organisations. This is rarely achieved through an exclusive relationship, as there may be insufficient demand or an inherent trading risk.

No supplier should ever rely solely on the goodwill of just one customer. Circumstances change and in this scenario, the changing needs or circumstances of the client might be terminal for the dependant supplier. You could ask the client to contribute to a case study about your work together, or provide a quotation for your promotional material. Referrals need to be dealt with more sensitively. If you have jointly developed a commercially-sensitive capability, the last thing the client will want is for it to be shared with their competitors, who would represent the most obvious choice to you as they are likely to have similar needs. Instead, look for opportunities across the client organisation or within their network of business relationships.

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Probe for deeper needs and explore cross disciplinary needs

Now that a trading relationship has been established you are in a good position to explore further opportunities. Do not be too hasty or too greedy as you will need to secure your relationship with your existing contact, and begin to build relationships with other contacts. Taken patiently, this exercise will build the reputation of your institution for high quality and wide-ranging provision. It is your job to ensure that products supplied by your colleagues are provided to a consistently high quality. The danger is that quite naturally, as your colleagues have been 'fed' this work rather than having 'hunted' for it themselves, they may not be as diligent or responsive to client requests as you have been. With your new client insight, you can successfully manage your colleagues – both academic and support staff – to exceed your client's expectations in a way that also benefits the institution.

your client might wish
to conduct joint promotion
to be seen as a beacon for good practice

Joint promotion of your initiative
In the event that your initiative is ground-breaking in nature and represents an approach to a common problem in the sector, your client might wish to conduct joint promotion to be seen as a beacon for good practice. This improves their reputation amongst their clients and improves their competitive position. It will also improve your profile as other organisations in the sector, or in related sectors, seek to benefit from your expertise. This can be done through case studies, press releases and other public relations activities such as events, conferences and showcases.

Making contact and meeting for the first time

Having identified your potential client, you will want to do your research. This may include a visit to their store/outlet/website, in a 'mystery shopper' capacity. Background information could also be accessed by requesting generic information (eg product brochure, annual report). This exhaustive process is not required for all clients, but should certainly be considered for large and complex organisations which might have multiple needs. Next, you should call the organisation to confirm the details on your database (including key contact). If you can reach the key contact, ask if you can send introductory information. This leaves a professional image and increases the chances that your letter of introduction will not be recycled along with the daily deluge of 'junk' mail.

Cold calling – a fictional case study

Bob is the Business Development officer for Western University. He has recently taken over the telephone sales work from another member of staff who is on long-term sickness leave. His new role requires him to contact customers from the database who have not bought any courses or consultancy for more than six months. His objective is to find out why they have not bought recently, and offer a new range of courses in the hope of generating more sales. Bob's manager, Alison, overheard one of his telephone calls that went like this:

"Hi, Mr Jenkins? This is er, Bob from the university you've used in the past. What have you been up to? We haven't heard much from you for ages. Oh, he's gone, has he? Listen, is business tough at the moment? Your predecessor used to send lots of people on our short courses but you don't seem to do so any longer. Why is this, if you don't mind me asking? Ah, well we were waiting for you to get in touch with us, not the other way round! OK, well maybe some other time perhaps, or I might drop in some time when I'm in your area and not too busy. We could, er, have a chat about our new courses. Good, thanks, bye."

a script should never
be used as it is manufactured,
insincere, and inflexible

You are probably now cringing with embarrassment at the lost opportunity. Here is a checklist for cold calls. It is not a script, as a script should never be used as it is manufactured, insincere, and inflexible and discourages listening on your part.

- Have I planned what I am going to say in advance? These are messages linked to benefits for the client.

- Have I researched as much information as I can about this prospect? This demonstrates the currency of your knowledge and helps you to ask informed and intelligent questions.

- Have I prepared my response to the 'gatekeeper'? Somebody will take seriously their role of 'protecting' the decision maker/budget holder from unsolicited sales calls. Again you need to focus on the benefits and your credibility.

- Have I got control of my voice? Smile – people can hear it. Warm up beforehand, as a croaky timid voice does not leave a good impression.

- Do I sound enthusiastic and professional in my approach? If you're not enthusiastic, why should they be?

- Am I ready to deal with objections? Expecting a 'no' will leave you well prepared. Be ready to politely ask 'why'. The client may need your product but you simply could have caught them at a bad time.

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key messages at this
point should be sufficient

- Have I provided enough information at this stage? Don't bombard the client with information. Two or three key messages at this point should be sufficient.

- Am I ready to speak logically and structure the conversation? Preparing using the position-problem-possibilities-proposal framework will help.

- Am I ready to ask for an appointment? Be ready with a couple of dates/times in the next two to three weeks. Offer one specific and one general appointment. For example, "How about Tuesday at 2pm or anytime on Thursday?" This gives the client room for manoeuvre and tells them that you are ready to do business.

Letter of introduction

Your first formal communication with a potential client needs to be brief, and deliver an impact that makes them take notice. Here are some guidelines.

Send it to the right person
The right person is the individual with the authority to fund – and has an awareness of – the problem to which you are proposing to provide a solution. There is a temptation to target the highest ranking officer of the organisation (the Chief Executive or Managing Director). In reality such individuals in larger organisations are disconnected from the day-to-day operational details. They will also be the main target for many speculative approaches and so may give your communication very little attention. As the decision-maker will differ between organisations, it is best to make a polite enquiry of the best-networked individual within it (normally in an administrative role such as secretarial, reception or switchboard)

as they will be at the social centre of the organisation and be part of many informal networks where workplace problems, and barriers to their resolution, are freely discussed. Once you have identified your target, it is worth asking to be connected them to do three things:

- Introduce yourself and your organisation
- Confirm that the problem you are seeking to assist with comes under their jurisdiction
- Get permission to send them a letter of introduction

the decision-maker will differ between organisations

You must not try to sell on the telephone at this point. You have too little information about the organisation and the individual. If you make a ham-fisted attempt at a sales pitch, you will be considered to be too pushy. On rare occasions, the timing of the call is so ideal that the client will make an immediate purchasing enquiry. Don't get carried away at this point. There is still a lot more that you need to know before you can get involved with confidence. If a client pushes for an answer, you are obliged to respond. Usually, these enquiries are price-based and do not give you the chance to gain a full understanding of the problem at a local level which will help you to propose the right solution. Give the client a ballpark figure (around 50 per cent higher than your standard daily rate) and state clearly that this is a provisional figure, and that a meeting would help you to identify ways to bring this down to a more appropriate level.

you should never
guarantee an improvement

Open with a benefits statement
This is your main ‘attention getter’ as it appeals directly to the need (ie to take away an organisational ‘pain’) and the urgency to buy. This framing statement – for example to help take advantage of opportunity ‘X’ to assist a revenue increase of 10 per cent or to address challenge ‘Y’ to secure a cost reduction of 10 per cent – will be returned to repeatedly when the client loses the importance of the discussion and is looking at it as just another purchasing decision. Remember, you should never guarantee an improvement. It is always dependent on implementation at the client’s end. You can only ever indicate ‘possible’ or ‘potential’ improvements of whatever percentage seems reasonable to you, based on previous experience.

Keep it short
One page should do it. A busy person will only skim read and may not get past the first paragraph, so make sure you communicate your key message sooner rather than later.

Outline what you do
Refer to your ‘lift’ pitch. Keep the language generic whilst avoiding vagueness, unless you are certain you are dealing with an expert audience and even then be careful with the use of jargon and acronyms.

Offer references
You may choose to attach a case study which will contain client endorsements. Nevertheless, openness in the introductory letter, by offering references, will communicate your trustworthiness and begin building a rapport with the target client.

Set out why you are better
Don't be shy but don't be overly boastful either. You should not make claims that you cannot support. If you have won awards or special recognition for your work, it should be mentioned but in a matter-of-fact manner. In reality, you are only as good as your next job.

Call to action
This is the purpose of the letter. You are trying to make something happen soon. What do you want the reader to do after they have read your letter? Call you for an appointment? Write with an enquiry? You may make a special limited time offer, maybe with a discount, for clients who respond within a certain time frame.

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what do you want
the reader to do
after they have read your letter?

Preparing for the first meeting

Assuming that your letter of introduction has been a success and you are invited to a meeting with the decision maker, here are some preparatory steps.

Find out what they do, for whom, and what specific benefits you can offer
Doing your homework about them and their sector will support your reputation as an expert and a potential business partner. Don't show off. The client will still prefer to consider that they have the edge in the commercial domain.

Try to anticipate current and future challenges in their market

Effective approaches to future challenges give organisations a competitive advantage as they can make better use of their resources.

Do it at their place

Seeing the quality of their premises (shiny and new or run down), the atmosphere (buzzing or lethargic) and the attitudes of their staff (dynamic and helpful or whiney and ignorant) will tell you a great deal about the organisation, its values and its ambitions for the future. You can show off your institution's facilities in due course. In the meantime, you could emphasise that meeting at the client's premises may be more convenient and will save precious time in a busy working day.

Building rapport

When you finally get face-to-face with a potential client, a positive first impression will set the tone for the meeting and the relationship.

Body language

According to Mehrabian (1971), the three communication elements of words, tone of voice and body language account for our liking – or disliking – the person who puts forward a message concerning their feelings. He estimated that words account for 7 per cent, tone of voice for 38 per cent and body language 55 per cent of the 'liking.' There are many books which deal with the intricacies of body language that cannot be covered here. Investment in such a book would no doubt improve the effectiveness of your face-to-face communication, so that the recipient remains open to you and the answers to their problems that you could bring.

Use their name
Lightly used this is friendly. Overused it could be patronising or indicate that you are nervous or inexperienced.

Empathy and understanding
Be sure that the client knows that you understand their challenges. This tells them that you have the necessary experience to help them. You may bring up a few examples, either anecdotally or in the form of case studies, which explain how you have helped other clients with similar issues. Overdone, it can seem like a counselling session.

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and body language 55 per cent of the 'liking.'

Listening and questioning skills
It is accepted that the person who is asking the questions is controlling the meeting. This does not have to be you, but in the event that the discussion is not flowing as freely or as openly as you would like, or moving in the direction that you would want, then you can employ open questions. These questions include the words 'what', when', 'where', 'how', 'who', 'why' and are designed to gain information. You could also ask closed questions (ie seeking a 'yes' or 'no' response) but this can work badly if there is a possibility you would get a 'no'.

‘No’ responses have a habit of gaining momentum in the client’s mind, when what we really want them to be saying is ‘yes!’ For example, you can ask a closed question using open words:

Closed question: ‘Have I got the order?’ or ‘Will you buy from me?’
Open alternative: ‘When can I start?’ or ‘With whom will I be working?’

what we really want
them to be saying is ‘yes!’

There is a certain presumption in the tone of the open question that forces the client to respond. They can accept your assumption that the relationship has progressed, or they can object. This reason for this objection will tease out the final concern in the client’s mind regarding the appropriateness of your proposal, which you can then deal with.

Focus on benefits

This focus will remind the client of your professionalism and that when the discussion turns to price, cost is relative to the benefits on offer.

Positive words

Words such as ‘but’ and ‘however’ break the rapport you have with a client. They are premature excuses for failure that will colour their expectations of your work. Consider the following statements:

“We have generated the preliminary data, but there is an unusual pattern that concerns me.”

or

“We have generated the preliminary data and there is an unusual pattern that intrigues me.”

“My preliminary assessment shows areas for improvement, however it is a big challenge to make the changes necessary in the timescale you indicated.”

or

“My preliminary assessment shows areas for improvement and we will prioritise with you to make the best use of the time you can spare.”

cost is relative
to the benefits on offer

In both cases, the message has been transformed from a negative and inactive approach to a positive and active one. This subtlety will not be lost on the client, even if only at a subconscious level.

Additional words that indicate a positive mindset in communications are:

Clean	Effective	Practical	Safe
Creative	Growth	Quality	Scientific
Durable	Independent	Ready	Successful
Economical	Innovative	Reliable	Tested
Efficient	New	Reputation	Valuable

Understanding client needs

Situation, Problem, Implication, Needs (SPIN) analysis helps us to gain a greater understanding of the challenges facing the client and the potential value of a solution. It can also be used to generate ideas, as any sensible client will not reasonably ignore the advice of experts who have been invited to help. Figure 31 shows the pro-forma SPIN analysis with Figures 32 and 34 showing fictional scenarios which do not represent real life business situations, which are to be used only for training purposes. The accompanying Figures 33 and 35 examine our options and prioritise action.

Date		Client	
	Question		
Situation	• Background • History • People • Previous experience of similar work		
Problem	• Products and services: range and quality • Market size, structure, trends • Segmentation and customers • Competition, pricing and positioning • Distribution and communication • Core competences/weaknesses		
Implication	• Financial health: revenue, costs, profitability • Market position • Innovation and leadership		
Needs Pay Off	• What's the potential deal? • Value matching (right price for the benefits the client will gain)		

Figure 31: SPIN analysis pro-forma

First we consider an example from the private sector; an analysis of the fictional engineering company, Lulworth Instruments.

Date	26th June 2011	Client	Jim Beddows, Manufacturing Director, Lulworth Instruments, Ilkeston.

Notes

Situation

Second generation family company traditionally focused on the marine industry, designing deep water drilling rigs for offshore oil and gas fields.

Established in 1952 by the client's father, Alfred Beddows, the company has declined in the last decade as technology (CAD/CAM and DesignPro) has made traditional design draughtsmens' skills redundant. Lulworth was sold to Endymion, Inc, on Alfred Beddows eventual retirement in 2001. Mr Beddows, Snr, chairs the board of Lulworth.

The current staff comprises 66 personnel. A team of 15 design engineers, a research team of three, prototype build and test team of 12, on-site test, installation and commissioning team of 23 and a management and administration team of 13.

Lulworth has little time for external consultants. The Beddows believe that their trade is problem-solving and baulk at hiring-in business and technical expertise. Endymion believes that the business has potential and is not willing to forego its £10,000,000 investment in Lulworth. The President of Endymion has instructed Jim to seek assistance from a university.

Problem

Products are bespoke to each individual situation. Lead times are long and require high levels of designing, test and improvement until the product is fit for purpose.

The oil and natural gas market is large and competitive. The key to success is to locate and explore potential concessions in remote and inhospitable locations to assess yield and accessibility, making a bid to secure the concession over competitors

The global market is worth £25 billion annually and is dominated by US suppliers with 55% share. The exploration industry is growing as oil producers seek to diversify away from Middle Eastern fields.

Exploration equipment is bought by small specialist drilling companies and the larger oil companies (eg Lukoil, Exxon, BP, Royal Dutch Shell) on a project basis.

This is a very risky business. Increasingly, oil companies are putting the onus on exploration parties to fund themselves with a commission being paid on exploitation. Benefits of a successful 'strike' can be phenomenal; losses on a dry well can be catastrophic. Many smaller companies are leaving the market because of this uncertainty.

Lulworth must decide whether it is time to leave its core market, which seems to be the only outlet for its dwindling expertise.

Implication

Lulworth's turnover was £10,000,000 in 2007 with a net profit of £3,000,000. The business has steadily declined over the last 4 years. The annual report for 2010 shows Lulworth's turnover had reduced to £6,000,000 with a net loss of £1,000,000.

Lulworth retains a reputation for the expertise of its team and the quality of its product. However, more cost-effective competitors are entering the market as they can respond to clients needs more effectively.

Needs Pay Off

Jim has asked for a proposal to deliver the following work over the next 12 months:

- Upgrade its manufacturing process to include rapid prototyping and lean manufacturing
- Explore alternative markets for Lulworth's expertise
- Develop the technical skills of designers, particularly around the use of digital aids

Figure 32: SPIN analysis example (Lulworth Instruments)

Carefully and creatively analysed, we can generate options and prioritise them using the client-centred criteria of importance (the difference that the solution needs to make) multiplied by urgency (how quickly it needs to be made).

Opportunity	Importance (3=high, 2=medium, 1-low)	Urgency (3=high, 2=medium, 1-low)	Priority (Importance x Urgency)
CAD/CAM and DesignPro training	2	2	4=4th
Access to state-of-the-art rapid equipment prototyping and lean manufacturing techniques	2	1	2=5th
Develop an investment-ready business proposal for Endymion	3	2	6=2nd
Assistance with outsourcing operations	1	1	1=6th
Development of design skills	3	2	6=2nd
Alternative markets study	3	3	9=1st

Figure 33: Option analysis for Lulworth Instruments case study

Date	7th July 2011	Client	Children and Parents Partnership (CPP).

Notes

Situation

CPP was formed as a charity in June 2003. Originally formed by a group of social workers and care providers, its goal was to provide meaningful work and learning opportunities for vulnerable adults, and much-needed respite for their carers (often close family members).

The organisation has a board of Trustees, chaired by Kuldip Singh, a prominent consultant psychologist based in the local NHS Trust, which comprises 12 members representing Social Services, care providers, parents and clients. Theresa Obiwumbe has been Chief Executive of CPP since October 2010 and was appointed with a brief to grow the income of the charity and provide a wider range of activities for service users and their carers/families. Theresa's background is in banking and she came to the charity after being made redundant from a national retail bank early in 2009. Despite this shortfall in professional experience in the sector, Theresa understands the needs of the client base well as her 17-year-old son, Michael, has a twin diagnosis of Asperger's Syndrome and Attention Deficit and Hyperactivity Disorder. Theresa chose the role after Michael was diagnosed with clinical depression, which manifested as challenging behaviour due to lack of stimulation.

Problem

CPP fulfils multiple roles as lobbying body, fundraiser on behalf of other smaller affiliated groups, and service provider. With the advent of the 'choice' agenda in Social Services, families are finding that using their allocated funding to source the right support for their children can be a confusing and stressful task. As a result of CPP's highly regarded activities, more families are asking for help. With this surge in funding, CPP has a number of challenges:

- How to manage, motivate and develop a growing band of volunteers which in 2008 numbered 23 and by early 2011 had grown to more than 200. These are highly valued helpers and Theresa needs to harness this enthusiasm to make a great impact for CPP
- The funding growth can buy additional services which are currently difficult to source, as supported living facilities are expensive to build and resource. Theresa needs to co-ordinate a fundraising campaign to raise money and attract partners willing to invest capital in building the necessary facilities which can then be paid for through revenue funding.
- CPP needs to broaden the scope of its offering to include day services, and leisure and health facilities for service users.
- There is a high incidence of mental illness amongst those who care for vulnerable adults. In order to keep this crucial 'army' of helpers mobilised, CPP needs to offer more help to carers.
- CPP's reputation has recently become national. As a result they have become the 'go to' organisation for similar organisations wanting to learn best practice. However, Theresa has recently been approached by a neighbouring council's Social Services department to interim manage a failing sister charity (Meadowview Mothers and Carers) with a view to taking over its commitments to the local community. Theresa is keen to help, but is already stretched to her limit.

Implication

CPP needs to decide how and where it will grow, or all efforts could otherwise lead to the collapse of the charity as public sector contributions are cut over the coming months. The window of opportunity is small. If Theresa can navigate this tricky time, she could transform a small, community charity into a regional – or even national – player. .

Needs Pay Off

Theresa has asked the Dean of Health, Professor Mike Seward, a friend since university days and also a Trustee of the charity, to see what the university can do to help.

Figure 34: SPIN analysis example (Children and Parents Partnership)

Opportunity	Importance (3=high, 2=medium, 1-low)	Urgency (3=high, 2=medium, 1-low)	Priority (Importance x Urgency)
Help with developing a fundraising strategy	3	2	6=3rd
Training in how to recruit and manage volunteers	2	2	4=5th
Training to work with learning difficulties and mental health problems	3	2	6=3rd
Developing appropriate business systems	3	3	9=1st
Study of services needed by service users with cost implications and potential partners identified	3	3	9=1st
Help with ensuring effective corporate governance	1	1	1=6th

Figure 35: Option analysis for Children and Parents Partnership case study