



White Papers

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The Michaels & Associates Sales Process

Part of our commitment to clients is to model our behavior during the sales process to exactly the same standards we expect of our consultants throughout the project lifecycle.

In other words, we speak openly and directly with our clients, explaining every nuance and implication of potential actions that we foresee. Our clients' interests take precedence to any sales agenda; as a result, our sales personnel receive commissions based on successful completion of client agreed-upon project benchmarks. We put our money where our commitments are.

Our client transactions begin and continue at the client's pace. We meet with our clients and listen, to learn their concerns. We ask questions similar to the ones listed below:

- What is the company organization and culture?
- What is the role and responsibility of our client?
- What is the definition of the potential project? What are the goals?
- What are the desired outcomes, results and deliverables of the project?
- Who is the target audience? Is the end product for the client's employees or customers?
- How many learners will be affected? What are their roles and responsibilities?

We will also ask simple "housekeeping" questions to help us determine the following factors:

- Project timetable
- Resource constraints (access to employees, computer systems and other logistics)
- Budget constraints
- Geographic challenges (large audience, all over the world? Or, small, intimate groups?)
- Payment processes

In our experience, clients do not undertake documentation or training projects unless there is one or more challenge they want to address. They have foreseen certain obstacles to success, and it is our responsibility to uncover those concerns and as many obstacles as we can. We will ask questions similar to the following:

- What is the driving force behind the project?
- Why did the client decide to outsource the project?
- What is the extent or limit to upper management support to the project?
- What are the foreseeable risks?



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All these questions have answers that will have extensive implications. Any consultant can ask appropriate questions. The truly superior Michaels & Associates consultant will explore the answers and question them to discover their implications:

- What happens to the client contact and/or company and/or employees if this project does not happen or if it fails?
- What happens if upper management throws little or no weight behind the project?
- What happens if this project succeeds beyond expectations?

From this interview process, we summarize a high-level proposal for the client and for the project. We present this proposal, usually in person. Our goal is to include only the items in a proposal that we have already discussed with the client. This enables the client to internally sell the proposal and the project.

In the proposal, we present the following information:

- A clear and concise definition of the project as we understand it.
- Our recommendations for the project, and how the recommendations meet the client/project needs and implications. We seek to set the project on a “success track”, the Direct Performance Path[®], and our solutions reflect that intent.
- A ballpark estimate to complete the project. We also state that detailed estimates cannot be given without detailed analysis. If the proposal is accepted, this estimate is refined after the project begins and we discover and document any new information resulting from a needs analysis.
- A table presenting costs that offer the client low, medium and higher value options.



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Next Steps

After the proposal is accepted, most clients opt to have Michaels & Associates conduct a needs analysis. This research results in a deliverable called a Findings Report. The Findings Report presents an unbiased view of the current situation for the client, along with recommended solutions. It also contains detailed estimates. Because the report sometimes uncovers new data and leads to additional requests, the estimates may be refined before our design and development phases.

Even client subject matter experts (SMEs) underestimate how much data they have to contribute, and this data can expand the scope of a project significantly. Throughout the project, we use an internal procedure to alert our clients of implications that are the result of additional requests or expanding data. This procedure spells out the costs of additional development requests. We let our clients decide whether to expand the scope of the project.

In all ways, through our sales and consulting processes, Michaels & Associates believes in modeling ethical behavior with our clients.

Michaels & Associates opened for business in 1998, and since then, we've been on a mission: make employees more effective in their jobs and ensure that these jobs are aligned with management directives. Yes, it's a challenge, but we continue to exceed our customers' expectations by offering fully-customized services:

- Training & documentation needs analysis & assessment
- Training design & development
- Training delivery & facilitation
- Technical writing & documentation design & development


Who benefits from these services? Our clients, from small software groups to retail financial giants, know they do. We have worked in the medical, homebuilding, finance, automotive, telecommunications, electronics, software, aerospace and travel industries, just to name a few. Regardless of the "who," our "what" remains constant: the best possible solution at the lowest possible cost. We form a true partnership with our clients so we can get to know their needs and execute their objectives quickly and expertly.

Our consultant family is as unique as our client base. We are composed of people with skills across nearly all tools, techniques, and approaches. Many of us have earned industry recognition, and Michaels & Associates has won Society for Technical Communications (STC) awards for instructional materials, documentation and e-learning. We want to provide the best solutions for our clients, so we pride ourselves in having the best people in the industry on our team.

Learn how Michaels & Associates will help you achieve your goals.

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