Put energy management into practice
ENGAGING WITH CLIENTS

Resource Efficient Management of Energy (REME)

Engaging with Clients

Looking into

- Typical challenges
- Reflect on role as advisor

Reflecting on common challenges in reaching out to companies

Plenary Discussion

1. What are common challenges in reaching out to factory teams?

2. What are the possible reasons?
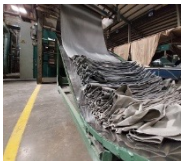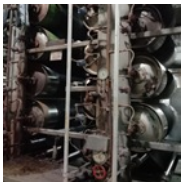
3. How did you deal with such situations/challenges?

Time: 15 min

Reflecting on good practices in reaching out to companies

In two groups:

- Group 1: What are the characteristics of a good consultant?

- Group 2: What are the characteristics of a good trainer?

Time: 15 min

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The consulting/advisory process

Source: www.consultingskills.com

Knowing your role

Being aware of our different roles

Non-Directive
Facilitator
Helps clients help themselves
Process helper

Directive
Expert
Helps clients by providing expert answers
Content helper

| Observer/ Clarifier	Process Facilitator	Problem Solving Partner	Process Resource	Educator, Trainer	Technical Expert	Advocate	Regulator, Enforcer
Observes, gives feedback, raises questions, and helps reframe concerns.	Provides process suggestions to help client(s) find their own best answer.	As equal partner, participates in the problem solving process from beginning to end.	Frames issues, gathers data and suggests new options	Helps client(s) develop new knowledge and skill	Provides expert information and solutions to client(s).	Actively promotes best technical solutions to client(s).	Protects the integrity of the system in the area of content expertise.

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Knowing your client

Who is your client („Buyer model")

Typical Client Group	Working Client(s)	Sponsor, Economic, or Financial Client(s)	End User Client(s)	Indirect or Stakeholder Client(s)	Coach Client(s)	Other Clients or Stakeholders
Description	Work directly with you Often on your project team *Represent* the sponsor client	Approve your proposals Release money Give the organizational "go ahead" The "real" client	Will use your recommendations on the job Will live with the results day-to-day	Have to be involved because your project needs their approval from a policy or technical perspective	Help you to succeed in their client system	Various others who have a stake in your proposal, e.g., your profession, professional group or government agencies
Typical Key Concerns (of Client Group)	Will this project succeed? Will I look good as a result of this project?	Are these proposals organizationally sound? Are these proposals financially sound?	Will this really work in the trenches? Do I have to change? Will I lose something? Do I like the change?	Do these changes fit policy? Are these changes technically sound? What problems can we see with these changes?	How can I help you succeed? How can you reciprocate in the future?	Do these changes fit with our definition of success?
Typical Benefits Desired (from Client's' point-of-view)	Clean project guidelines Won't take too much time Career enhancement Project is successful - on time and on budget	Bottom line Cost / Benefit Fits with the organizational strategy Politically easy to sell to more senior management or stakeholders	It works It's easier Makes my job more fun Career enhancement	Fits policy Fits technological strategy	Enjoy working with you Networking Future considerations	Fits our policies and strategies

Understanding Client's Needs


Clarifying client´s needs: Guiding questions
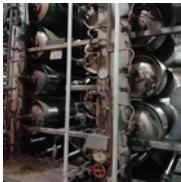
- What do you want at the end of the project?

- Why do you want this?

- How will you know you have what you want?

- How will it look/feel/sound when your organization has this?

- What other assistance will/does your organization have to reach this goal?

- What has stopped you/your organization doing this until now?

Planning first client visit
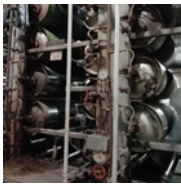
Sequence of meeting	Have available…
Start off with an introduction of yourself, explaining the general purpose of the visit	
Make a preliminary presentation of energy management and its possible benefits for the company	Handouts, brochure
Get permission to take a look at the company using the EnMS Maturity Matrix tool. Explain that this tool allows the company to get a quick idea of the present situation of its energy management.	EnMS Maturity Matrix Tool, CbD 10 Best Practices Tool (or similar)
Suggest that the management, production manager, EHS or Utilities-in-charge and you separately fill the questionnaire	Have 3 - 4 extra copies of the Maturity Matrix tool readily available
Conduct walk-through visit and gather information to answer the quick scan questions	
Meet after the walk-through to review the results **Present your finding** **Compare your findings with the answers entered by the company representatives** **Encourage a reflection on the findings** **Explain how the EnMS/EE program can address shortcomings identified**	In case you have a notebook computer with you, enter the findings into the spider-web diagram
Decide on the next steps **Conclude meeting**	Prepare minutes and share with company

Other issues to clarify in advance

- Main contact person in the company
- Support needed from the company during the service delivery
  - Technicians required
  - Working space
  - Accessibility
- Preliminary data requirements
  - Data logs
  - Test reports
- Announcement of scope, boundaries, and responsibilities
- Top management availability
- …

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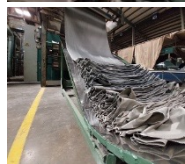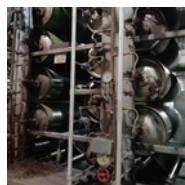
Remember the Change Formula

Key factors influencing the willingness to change in your company

- **C** is change
- **D**issatisfaction with current situation (D)
- **V**ision of what is possible (V)
- **F**irst concrete steps that can be taken towards the vision (F)
- **R**esistance to change (R)

Change will take place when

$$C = D \times V \times F > R$$

Gleicher Formula (Dannemiller version)

Putting the client into the driver`s seat

Example „Dialogue of Sustainability"

- Step 1: Constitution of factory-level Change Management Teams (CMT)
- Step 2: Development of baseline
- Step 3: Development of action plan using six step methodology

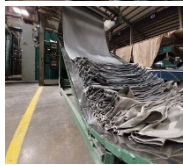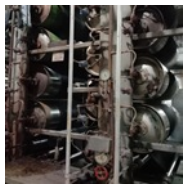|	
1- Identify Problems	• Statement round, checklists, meta-plan method, idea generation from workers
2- Cause Analysis	• Fishbone diagram / Pareto principle
3- Goal Analysis	• Flow chart
4- Find solutions	• Brainstorming • Best practice
5- Agree on solution	• Voting by dots
6- Action Plan	• Creating action plan

- Step 4: Schedule regular meetings of the CMT members

Ready to start?

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