

Table of Contents

1. The Challenge.....	1
1.1 HSBC’s Need for Consulting Excellence	1
1.2 The Partnership – HSBC & LFGSM.....	2
1.3 Defining Business Impact.....	3
2. The Commitment	4
2.1 Learning Needs Analysis.....	4
2.2 Reaching Agreement and Moving Forward	5
2.3 Project Planning	6
3. The L&D Initiative.....	7
3.1 Defining the Learning Approach	7
3.2 Managing the Partnership to Ensure Success.....	9
4. The Impact	9
4.1 Indicators of Impact	9
4.2 Changes and Business Results Derived from the Program	10
4.3 Looking Ahead – Continuous Improvement	11
Appendices:.....	13

1. The Challenge

1.1 HSBC’s Need for Consulting Excellence

HSBC Group, headquartered in London, is one of the world’s largest banking and financial services organizations, with assets of \$2.4 billion (as of 31 December 2009) and serving customers worldwide from around 8,000 offices in 88 countries and territories. HSBC -- North America consists of the company’s U.S. and Canada operations, and is one of the ten largest bank holding companies in the United States, serving customers in the following key areas: personal financial services, credit cards, specialty insurance products, commercial banking, private banking, and global banking and markets. The Bank’s strategy is based on its differentiating combination of global scale and local presence – as captured in its marketing tagline “the world’s local bank” – and effective management of its Information Technology Infrastructure is critical to its ability to successfully deliver on its brand promise, achieve global scale, and adapt the network and systems to meet constantly changing customer, market, and regulatory demands. The IT and shared services function, titled HSBC Technology Services (HTS), comprises approximately one-third of HSBC’s global workforce, and is tasked with meeting the needs of business stakeholders as they seek to respond nimbly and progressively to the marketplace.

North America Learning serves the learning needs of the HTS organization through a unique catalog of courses that seeks to balance the technology-specific professional development needs of the workforce with a solid grounding in business acumen, relationship management, and consulting expertise.

In 2001, the HTS organization adopted its current shared services model, whereby IT services are sold to the business, and the HTS organization is fiscally accountable for cost coverage and budget adherence. This new approach to the management of the IT function placed a premium on client satisfaction, and on the ability of IT leaders and project managers to successfully discover and address the needs of the business. By 2007, client satisfaction scores were closely monitored across the organization as a measure of successful partnership with business stakeholders. Figure 1.1 (below) shows the trend of client satisfaction results in late 2006. While the trends for each major line of business indicate steady improvement, a need was identified to further strengthen the organization’s consulting competency. In an effort to drive for better results in this area, the North America Chief Technology Services Officer and the Managing Director of Business Systems reached out to North America Learning to discuss a solution.

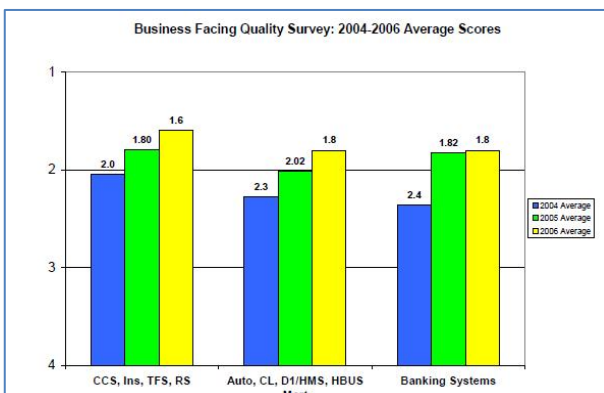


Figure 1.1 – HTS Client Satisfaction Trending (2004-2006)
 Scores on a scale of 1 (high satisfaction) to 5 (low satisfaction)

1.2 The Partnership – HSBC & LFGSM

In March, 2007, Lake Forest Graduate School of Management (LFGSM) was approached by HTS leadership and members of HSBC’s North America Learning organization to collaborate on an approach aimed at taking their IT professionals to the next level. It was HSBC’s intention at that time to send 80% of their senior manager-director IT level employees through an Advanced Consulting Skills program. Why? To be able to add greater value to the businesses that they support, create greater consistency throughout IT, and improve communications with business stakeholders.

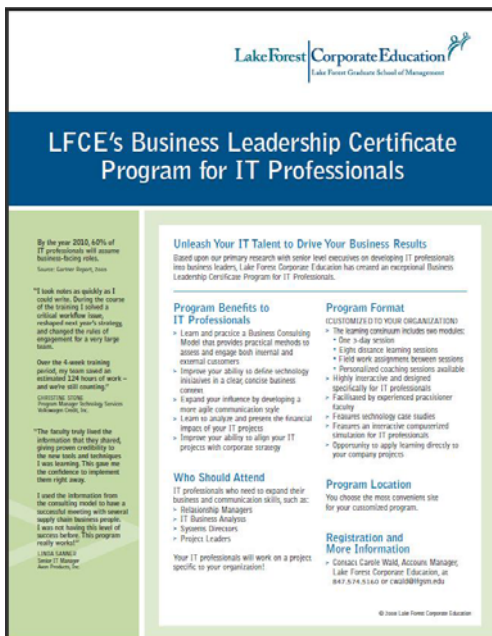


Figure 1.2 – Lake Forest Corporate Education (LFCE) certificate program for IT professionals, aimed at enhancing the balance between deep functional expertise and strategic collaboration.

LFGSM’s Lake Forest Corporate Education division (LFCE) specializes in meeting the business needs of functional experts. LFCE’s corporate education practice consists of research on an area of functional expertise, leading to the creation of a white paper and the development of a certificate program based on the paper which is then offered to professionals in that function. LFCE’s initial foray in this specialty addressed the needs of IT professionals, resulting in the development of an IT management certificate program and two expert seminars in 20xx. Subsequently, LFCE offers open enrollment IT certificate programs 2-3 times per year.

On the basis of its existing practice in IT management development, HSBC chose LFGSM as its partner for this important initiative. Note: To avoid confusion, LFGSM will be used for both Lake Forest Graduate School of Management and for the Lake Forest Corporate Education division.

1.3 Defining Business Impact

At the onset of the collaboration between HSBC and LFGSM, it was recognized that this learning effort must yield a positive business impact that could be measured against existing goals and success metrics. As noted above, these included client satisfaction survey results. Additionally, there was a strategic eye toward a major global initiative titled “One HSBC”, which was to consolidate and standardize business operating models and support system infrastructures across the organization worldwide. Implementation of One HSBC systems was to be a key driver of transformational change, and would require that the HTS organization be able to consult effectively in order to balance local business needs with globally aligned strategic imperatives.

Additionally, the success of the shared services model that HTS had implemented earlier in the decade required an ongoing demonstration of added value to the business. Likewise, other parts of the North America organization, including HR and Learning, were planning to move to a shared services approach. HTS’ ongoing success and continuous improvement would set the stage for this organizational transformation to take place within other global functions.

Key stakeholders in the project included HTS executives and staff, North America Learning, and, secondarily, every department that interacted with HTS (literally the whole bank). These customer stakeholders would benefit from the enhanced capabilities of focused IT professionals who were proactive and true business partners, balancing strategic understanding and foresight with technical expertise.

An advisory group was formed with six senior IT professionals to better understand: the current level of consulting capability, the perception of HTS by the business, and essential program goals. (See Appendix: Advisory Group). This group identified the desired business impacts of the Advanced Consulting Skills course, which were to take HTS to the next level by:

- Adding value to the business
- Building stronger, more consistent relationships with clients/business units
- Improving communication and responsiveness with the business
- Viewing IT partners as consultants to the business who can make work less complex and transactions cheaper
- Understanding business requirements and project change requests better in order to explain impact in terms of time, resources, and costs

2. The Commitment

2.1 Learning Needs Analysis

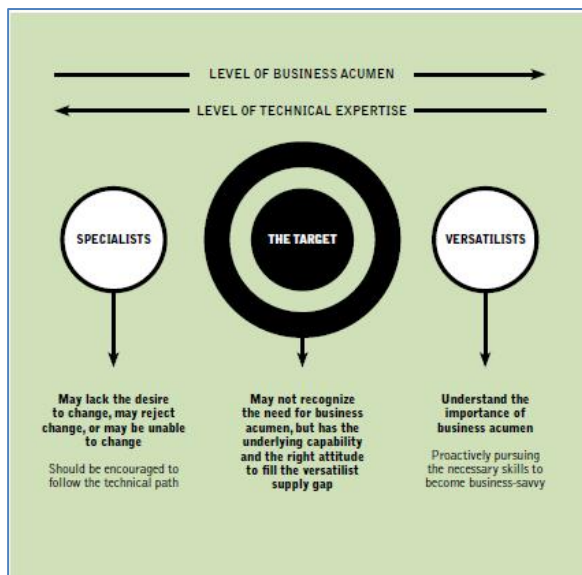
Once the advisory group defined the challenge at a high level, a detailed needs analysis was undertaken jointly by LFGSM and HSBC North America Learning. The benefits of the LFGSM-HSBC collaboration quickly became clear, as LFGSM was able to leverage their extensive research and specialty in understanding the business needs of functional experts, especially IT professionals. The advisory group was able to affirm that the HTS staff learning needs were consistent with many of the learning gaps outlined in the LFGSM white paper, including:

- Interpersonal and Communication Skills
- Negotiation Skills
- Finance Skills
- Strategic Thinking Skills
- Project Management Skills

Figure 2.1, below, illustrates the balance between specialization and versatility that LFGSM’s research identified as a target opportunity for the IT professional. This target was an accurate reflection of HSBC’s learning need.

The next step in the analysis was for someone from HSBC to attend the LFGSM IT Leadership Certificate program to identify what parts of the program were needed for HSBC. After attending the 5-day

program, three topics were specifically identified as the most important for HSBC’s IT professionals:



- Understanding Strategy
- Negotiating Effectively
- Internal Consulting Skills

The identification of these key topic areas allowed the advisory group to proceed with identification of specific places where the course materials could be tailored to fit HSBC’s cultural context.

2.2 Reaching Agreement and Moving Forward

The initial needs assessment completed by the HSBC advisory group and LFGSM resulted in a clear view as to the program deliverables, and measures of success. From here, both organizations were ready to clearly define the terms of the collaboration, and begin the work of designing, developing, and delivering the program. The goals of the agreement between HSBC and LFGSM were as follows:

- HSBC wants to advance the business relationship skills of its senior IT leaders and project management professionals in the area of understanding strategy, negotiating effectively, and advancing internal consulting skills.
- HSBC wants educational programs that are customized to HSBC, offered regionally if needed, and aligned directly to its global Capability Framework, incorporating the TDF communication tool¹.

To ensure that HSBC's selected IT professionals advance their business interface skills, LFGSM recommended a program with the following features and commitments:

- LFGSM will design and deliver a 3-day program that teaches strategy, negotiation/influencing and internal consulting skills to selected N and D band IT professionals (senior manager level).
- LFGSM will build from the current content already designed by LFGSM
- HSBC will identify people to serve on an advisory group to work with LFGSM to review and have input into the program design and delivery. This process ensures greater relevancy of the curriculum and support of the program.
- The program will be piloted in Chicago but be prepared in a way that it can be delivered at a location of HSBC choice (nationally or internationally). The program will be tailored to HSBC using relevant scenarios, assignments, problem solving, and reinforcement measures directly applicable to HSBC.

In order to maximize the program's benefits while maintaining appropriate fiscal responsibility, HSBC and LFGSM agreed the program would leverage content from the LFGSM Certificate Program for IT Professionals. This would help to contain design costs, with the majority of the design effort focusing on tailoring of course materials to match HSBC's specific organizational needs and examples.

Additionally, it was agreed that

- LFGSM faculty would travel to HSBC locations to meet the needs of HSBC IT professionals and save the expense of bringing them into HSBC headquarters or LFGSM's campus.
- Once the final recommended changes were made after the pilot, LFGSM would complete any additional updates at no charge.

¹ TDF is a perceptual styles tool and training program that is widely used within HSBC to enhance interpersonal communication.

- After the pilot program, new contracts were developed for the years 2008-2009 and 2009-2010. Creative thinking allowed LFGSM to continue to deliver the program for less by 1) having HSBC commit to a number of dates and 2) having HSBC take care of the printing of materials and 3) reducing one faculty on out of town assignments, thus lowering overall travel costs.
- This type of partnership allowed HSBC to continue offering the program during periods of greater focus on expense management, while lowering costs for both parties.

In order to ensure that the LFGSM team had what it needed to complete the design work, HSBC provided access to online courses in its HTS Learning Management System, access to TDF training content, and strategic updates and communication from the North America Chief Information Officer. The agreement between HSBC and LFGSM also ensured that a project team of committed individuals from both institutions would meet on a weekly basis to ensure that all aspects of the design and development effort remained on track.

2.3 Project Planning

In order to ensure project control and completion, a high level project plan was developed at the outset, responsibilities assigned, and updated every week (see appendix: HSBC-LFGSM Project Plan). Key deliverables included the following three major areas:

- 1) Overall program planning (advisory group meetings, faculty review and selection)
- 2) Design and development process including reviews of high level design, curriculum design, prework, handouts and walk through (see appendix: LFGSM Curriculum Development Process)
- 3) Logistics and communication including pretest and posttests, marketing and communication, keynote speakers, and travel arrangements.

Throughout the project effort, LFGSM maintained primary responsibility for managing and updating the plan. This ensured that a single plan of record was in place, and could successfully guide the collaborative efforts of all team members.

3. The L&D Initiative

3.1 Defining the Learning Approach

After major content areas were identified, LFGSM worked with HSBC to assign faculty members, based on subject matter expertise. Faculty members were chosen because of their experience in applying the subject matter to their daily work. This approach ensured that HSBC received the benefits of this practical expertise. It also allowed for faculty to be an integral part of the design methodology from the start.

Objectives for the course were identified in the areas of Strategy, Negotiation Skills, and Internal Consulting. Each module was designed to meet specific purposes as follows:

- The **Strategy** module seeks to demystify the concept of strategy as an “ivory tower” exercise, and bring it to a more practical understanding of how the work participants do integrates into HSBC strategy. The content of the module also includes strategic tools and frameworks, and aims to foster an appreciation for the challenges of communicating a strategic vision across the organization. Throughout, practice opportunities are offered to solidify understanding and practice the development and communication of strategic imperatives.
- The **Negotiations** module explores the fundamentals of negotiations, including key variables of negotiation, overcoming obstacles, and understanding (and avoiding) positional bargaining. Notably, the module also emphasizes ways to retain the relationship while negotiating, interweaving concepts from the TDF course on perceptual styles. The ultimate aim of this module is to integrate successful negotiations into an over-arching consultative approach that results in win-win results.
- The **Business Consulting** module integrates the concepts of strategy and negotiation into a cohesive, 5-step model for internal consultation, focusing on essential communication and relationship management skills. The emphasis is on a clear, collaborative definition of needs, and a discussion and practice using the critical business consulting skills that are interdependent with technical consulting skills.

While these three modules would each be taught by different instructors, and could be managed as independent subjects, a need was clearly identified to ensure that these topics were highly integrated with each other in the following ways:

- Faculty reviewed each others’ high level design and materials,

- Faculty attended each others' sessions to learn first-hand what was covered and discussed, and to better integrate across the program, and
- Faculty regularly spoke with one another after programs, and if needed, during the program to meet the needs of each class.

The learning methodology included many techniques, beginning with assigned pre-work readings. HSBC management took an active role in emphasizing the criticality of the course, and the importance of completing all pre-work assignments prior to class attendance. As a result, faculty commented that the high level of preparedness among the participants allowed the class to move into more robust content quickly and confidently.

During the three-day instructor-led session, participants engaged in:

- Lecture and discussion (to introduce new content and material)
- Case studies (to see how the subject matter has been incorporated)
- Project work (to apply learning directly to current projects)
- Role playing (to practice skills and feel more comfortable using them)
- Exercises (to both introduce and practice new skills)
- Brainstorming (to learn how to apply new skills to existing work)

Classes were held in LFGSM or HSBC classrooms, set up to maximize collaboration. Classrooms at both organizations are state of the art, and HSBC's North American headquarters facility features green technology aimed at making all aspects of work (including training) more environmentally responsible.

In order to ensure a cohesive course that flows from one day to the next, each faculty member leaves flipcharts on the wall from discussions, allowing review and integration of content during subsequent days. In addition, all three instructors have sat in on each others' program so are able to refer to content and learning outcomes from each others' facilitation. This ensures that the learning from each topic is fully integrated.

During the first year, in-class evaluations and extensive debriefs after the conclusion of each class provided immediate feedback on the program. This information was used to improve curriculum. Results of initial in-class evaluations are included in the appendix: Evaluation Data. As the program continued, content was continually reviewed and modified to best meet the needs of HSBC's participants, and to integrate updated information on HSBC's strategy and internal best practices.

3.2 Managing the Partnership to Ensure Success

In the beginning, project plans identified specific goals, roles, actions, dates, and responsibilities (see appendix: HSBC-LFGSM Project Plan). Once the program became part of HSBC's business-as-usual curriculum, a standard course implementation template was developed, describing tasks and timing to ensure successful course delivery. In subsequent years, LFCE and HSBC continued to meet to review the effectiveness of the course delivery, and recommend and implement any changes for the future.

As the North America Learning organization experienced significant change in its structure and coordination of this program, LFGSM and HSBC continued to meet to ensure a successful transition of knowledge about the program, and to improve upon existing processes, communications, and workflow.

4. The Impact

4.1 Indicators of Impact

In order to ascertain the program's level of success, it was essential that both LFGSM and HSBC North America Learning revisit the business' key challenges, which were to enhance client satisfaction, to more effectively institutionalize the shared services model, and to prepare for future enterprise-wide IT initiatives, such as One HSBC.

From a learning perspective, there was also a need to measure participant satisfaction and ensure that the class delivery continued to be effective. Taken together, these indicators illustrate the great extent to which the collaboration between HSBC and LFGSM met HSBC's business and learning goals.

In 2007, feedback from participants was highly positive, as indicated by the following results:

- The session was well designed: **4.41/5.0**
- This program was valuable and I would recommend it to others at HSBC: **4.57/5.0**.
- The faculty used effective presentation and facilitation skills: **4.70/5.0**

For complete evaluation metrics see Appendix: Evaluation Data.

It is important to note that this level of success has continued throughout subsequent programs.

Participant comments were generally quite positive, and expressed an enthusiasm for the relevance of the course content to daily responsibilities:

- “The practical workshops gave us an opportunity to apply the teaching. I am coming away with some new tools in my “tool kit” that will help me to manage up and accomplish my stated objectives.”
- “Nice step up from other consulting courses offered. Subject matter relevant—especially with our focus on relationship management. Great instructors. Nice use of break outs to keep people interested and drive the message home.”
- “Good and realistic examples. Instructors took the time to learn HSBC & provide real examples.”

Additionally, the HTS leadership team continued to track progress against client satisfaction goals, and saw improvement continue as the program was introduced within the senior manager population.

Figure 3.1 illustrates this ongoing trend of improvement:

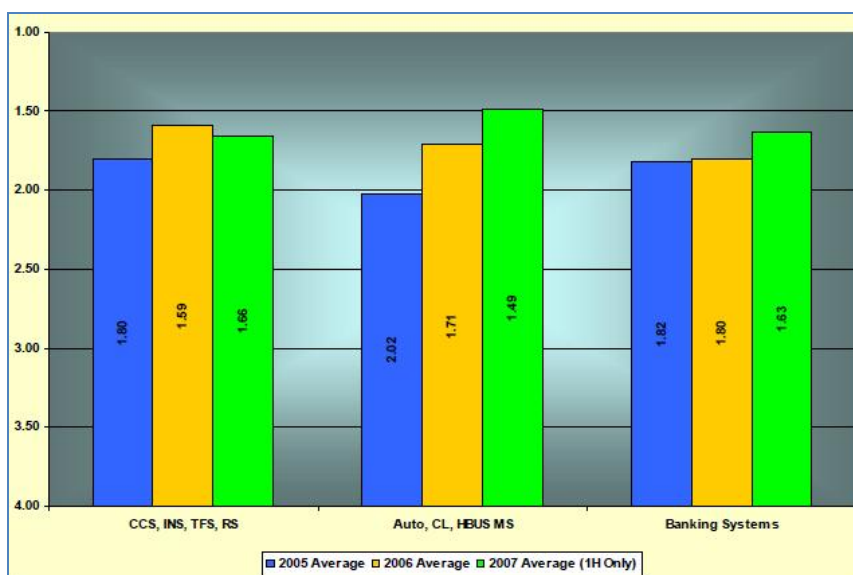


Figure 3.1 – Client Satisfaction Trending, including 2007 results.

Scores on a scale of 1 (high satisfaction) to 5 (low satisfaction)

4.2 Changes and Business Results Derived from the Program

The increase in the HTS organization’s consulting expertise was identified as an added value to business partner relationships, and allowed the full institutionalization of the shared services model to be completed. Additionally, the organization developed needed skill-sets that have become essential to the ongoing implementation of several high-profile strategic imperatives, including One HSBC and implementation of global system platforms for HR and Project Management.

Senior leadership within the HTS organization has expressed their satisfaction with the course, and it continues to be an integral part of the leadership curriculum for IT professionals. As HSBC moves forward in partnership with LFGSM, strong positive feedback continues to lead to new opportunities that will bring this course to additional audiences across North America, and around the world.

4.3 Looking Ahead – Continuous Improvement

As a direct result of participant feedback and ongoing faculty review, the course content has continued to be examined and updated to ensure alignment with HSBC’s stated business practices and goals. Specifically, enhancements to each of the three course modules have included:

- **Strategy:** Changed the seminar from broad corporate strategy discussions (scenarios for the future, Porter's Five Forces that bound the HSBC industry environment, etc.) to more focus on strategy execution: given evolving corporate priorities (emphasis on a global perspective, importance of Asia, etc.), how do you know your initiatives are effectively aligned with those of your business partners, and what are your critical priorities to support HSBC? What emerges is often that within and across groups there is confusion as to roles and responsibilities. The course focus is on giving participants tools and techniques to develop their own or their group's strategic direction to support corporate requirements. The key question is: “what should you be focusing on for greatest strategic value to the corporation?” shifting from passive to active involvement for attendees.
- **Negotiation:** Focused more on the issues that participants kept asking about, including how to boost performance and effectiveness within current budgets, how to open lines of communication, and how to maintain effective negotiation practices in the face of shifting priorities.
- **Consulting skills:** People left the program with a stronger sense of ownership and need for educating their business partners about the role, expectations and working relationship with IT. The cases situations that come up most often include business partners who have trouble “seeing the forest through the trees” and need guidance to understand the benefits of balancing organization-specific solutions and enterprise wide system solutions that create consistency internally and with their customers, and the need for IT to act as a partner in supporting the business’ growth objectives.

The course is driving cultural change at HSBC by demonstrating HSBC’s expectation that IT professionals provide both application expertise and leadership. As noted above, the successes in the HTS organization as a result of this program have caused others within the global Learning function to take notice, and opportunities to expand the utilization of the course in other functional areas and geographic regions are being actively explored.

As the LFGSM-HSBC collaboration continues, we look for other ways to advance the learning that has begun with Advanced Consulting Skills. A key example of this is the creation of a global blended learning program that further strengthens the proactive internal consulting skills of all IT professionals globally in the organization. We look forward to continuing this success story by implementing new programs and approaches that will provide positive, measurable impact for HSBC's IT and business stakeholders.

In sum, a true partnership continues to exist between HSBC and LFGSM that ensures the highest level of program delivery, content which is continually updated as conditions change, and a focus on helping participants strengthen their new skills and build upon them. Together, we are pleased to provide the organization with such an impactful program. This commitment has been sustained for four year without respect to program leadership changes – an indication that the program has been embraced by the organization. We are pleased to continue to carry the torch and keep the program, and other joint initiatives, relevant and practical.



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Appendices:

Advisory Group

LFGSM Curriculum Development Process

HSBC/LFGSM Project Plan

Evaluation Data

Advisory Group

Curriculum Advisory Group Description

Description

The Curriculum Advisory Group is a time limited task force that exists to provide input and recommendations to LFCE for curriculum design and delivery.

Goals and Responsibilities of Advisory Group

- To serve as a time efficient forum for advisory representation of key stakeholders so that training can be designed to achieve desired performance changes
- To provide input and feedback from representatives of the actual participants and their managers in order customize the curriculum to make it relevant to HSBC audiences, situations and challenges.

HSBC Membership

A total of 4-6 representatives

LFCE Membership

Selected LFCE team members will lead sessions and send out draft curriculum to receive and respond to suggestions and feedback

Duration

Typically 4 weeks prior to first time program delivery and 2 weeks after first program as well as agreed upon intervals during delivery of ongoing curriculum

Format

One-two meetings (one hour each) before program and one meeting after each first time of program (those not available may conference in via phone)

1. Curriculum, outcomes, content, relevancy and teaching approaches
2. "Curriculum Walk-through" prior to first delivery
3. Curriculum evaluation and input for any needed changes

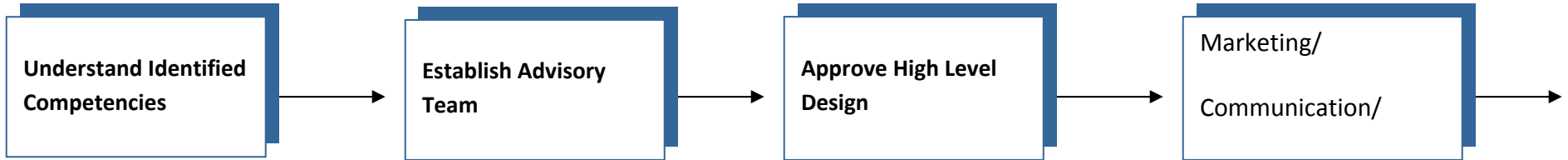
E-mail (with response time of 48 hours)

- To get examples for application to HSBC
- Review significant curriculum changes and provide any needed feedback

Estimated Time Commitment

- Review of curriculum (one hour meeting/call per first time program)
- Curriculum “walk through” before first program
- Estimated 15 minutes to review changes or scenarios via email
- Evaluation meeting/call (estimated one hour) after first time program
- Other input if needed as mutually agreed upon

LFISM Curriculum Development Process



Purpose: Collect data about competencies and organizational goals in achieving them

Assess infrastructure that will support educational intervention to build/strengthen competencies

Outcome: Gather information to determine competencies and their intended effect on employees, organization, customers, and stockholders

Purpose: Confirm performance needed/desired
Build curriculum ownership process to align with other interventions to accomplish competencies

Outcome: Identify performance outcomes for training program

Keep learning targeted to specific knowledge, attitude, skill, or habit changes

Purpose: Develop an overall curriculum design based on core competencies and performance needed
Identify and approve faculty

Outcome: Approve program design tailored to client business and culture

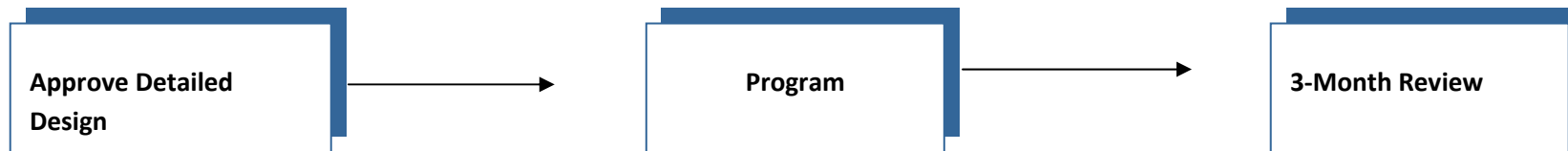
Faculty approved that meets client needs

Marketing/
Communication/

Purpose: Generate enthusiasm and support for training
Identify company roles in program
Determine training methodology and metrics for evaluation

Outcome: Communication strategy
Appropriate training methodology

Identify factors to be measured



Purpose: Approve curriculum

Outcome: Curriculum tailored to client's needs

Purpose: Walk-through, pilot, and program delivery

Outcome: Meet performance outcomes

Purpose: Link learning to performance
Measure results

Outcome: Return on learning investment
Identification of future development needs

HSBC/LFGSM Project Plan

**HSBC IT CERTIFICATE
HIGH LEVEL PROJECT PLAN**

FOR PROGRAM DELIVERY DATE: May-August, 2007

Task Number	Task Name	Member Responsible	Start Date	Due Date	Status	Notes
Overall Program Planning						
1	Identify Advisory Group/Determine program dates/Conduct Advisory group meeting/Sign SOW and Consulting Agreement/Reserve Rooms	LFCE/HSBC	DONE	DONE		
2	Discuss project plan/style of working/project management/status meetings	Howard/Ron	3/14/07	3/14/07		
3	Develop follow-up questions for Advisory Group	Howard/Erica	3/16/07	3/16/07		
4	Talk with TDF	Howard	3/9/07	3/16/07		
5	Send bios of potential faculty	Howard	3/14/07	3/16/07		
6	Interview and approve faculty	Ron/Steve/ Howard	3/16/07	4/4/07		
7	Second Advisory Group meeting	All	4/23/07	4/25/07		
8	Other HSBC information/integration	Howard/Ron/ Steve	3/1/07	Ongoing		

Task Number	Task Name	Member Responsible	Start Date	Due Date	Status	Notes
Design and Development						
9	Create High Level Design topic 1	Faculty/Howard	4/4/07	4/11/07		
10	Create HLD topic 2	Faculty/Howard	4/4/07	4/11/07		
11	Create HLD topic 3	Faculty/Howard	4/4/07	4/11/07		
12	Approve High Level Designs	Ron/Steve	4/11/07	4/13/07		
13	Develop prework, cases, manual	Faculty/Howard	4/13/07	4/27/07		
14	Develop evaluation, pretest, communication plan	Howard/Ron	4/13/07	4/27/07		
15	Walk-through and approve materials	All	4/30/07	5/3/07		
16	Print production	LFCE	5/14/07	5/18/07		
17	Revisions, evaluation, Review	Steve/Ron/ Howard	5/29/07	5/31/07		
Logistics and Communication						
18	Discuss ROLI	Steve/Ron/ Howard	4/24/07	4/27/07		
19	Develop pre-test	Howard/Ron	4/24/07	4/27/07		
20	Develop post-test	Howard/Ron	5/18/07	5/31/07		
21	Order food	Ron/Jen	5/14/07	5/18/07		

Task Number	Task Name	Member Responsible	Start Date	Due Date	Status	Notes
22	Get participant list for nametags and certificates	Ron/Steve	4/4/07	5/14/07		Need as soon as possible
23	Determine, secure kickoff speaker	Ron/Howard	5/1/07	5/3/07		
24	Communication/Marketing plan	Ron/Howard	4/13/07	4/27/07		
25	Plan final evaluation/ROLI	Ron/Steve/ Howard	5/18/07	5/31/07		
26	Travel arrangements for Buffalo	Ron/Howard	5/18/07	6/1/07		

Evaluation Data

HSBC

HTSN Advanced Consulting Skills Workshop

Workshop Evaluation Results

Course	May 2007	June 2007	July 2007	August 2007	Average
Strongly Disagree = 1					
Strongly Agree = 5					
1. This session was well designed (pace and content)	4.03	4.7	4.19	3.92	4.21
2. As a result of this session, I have a greater understanding of strategic thinking.	4.00	4.65	4.06	3.96	4.17
3. As a result of this session, I am able to do a SWOT analysis.	3.96	4.7	4.25	4.21	4.28
4. As a result of this session, I am able to identify Key Success Factors for an HSBC business group.	3.92	4.55	3.75	4.09	4.08
5. As a result of this session, I know the importance of innovation for HSBC and can use some creative problem solving techniques.	4.11	4.3	4.44	4.54	4.35
6. <i>Phil Corse</i> used effective presentation and facilitation skills.	4.38	4.7	4.75	4.46	4.57
DAY TWO - CONSULTING					
7. I know the five phases of the business consulting model.	4.07	4.75	4.44	4.33	4.40
8. I can apply the business consulting model with my internal clients.	4.11	4.65	4.31	4.33	4.35
9. I can accomplish key actions and operating procedures at appropriate stages of the business consulting process.	4.00	4.74	4.44	3.88	4.27
10. I can recognize, manage and overcome barriers encountered during the business consulting process.	4.03	4.70	4.19	4.25	4.29

Course	May 2007	June 2007	July 2007	August 2007	Average
Strongly Disagree = 1					
Strongly Agree = 5					
11. This session was well designed (pace, time, and involvement, etc.).	4.19	4.85	4.63	4.25	4.48
12. <i>Erica Nelson</i> used effective presentation and facilitation skills.	4.61	4.90	4.81	4.63	4.74
DAY THREE – NEGOTIATIONS					
13. As a result of this session, I know and can prepare for the 3 crucial variables of negotiation.	4.26	4.63	4.38	4.17	4.36
14. As a result of this session, I know and can use the 5 steps of preparation.	4.26	4.79	4.44	4.29	4.45
15. As a result of this session, I am able to identify my BATNA in a negotiation.	4.12	4.37	4.19	4.21	4.22
16. As a result of this session, learning to recognize the tricks and ploys others use will help me to negotiate more effectively.	4.40	4.47	4.44	4.08	4.35
17. This session was well designed (pace, time, and involvement, etc.).	4.46	4.68	4.75	4.25	4.54
18. Steve Moroni used effective presentation and facilitation skills.	4.84	4.79	4.94	4.63	4.80
OVERALL					
19. This program was valuable, and I would recommend it to others at HSBC.	4.23	4.90	4.69	4.46	4.57
20. The Hotel was appropriate and adequate for this workshop (location, rooms, food, overall service).	3.81	4.22	4.09	4.57	4.17
21. The transportation options for arriving at the airport were clear and easy to use.	3.40	4.25	4.3	4.25	4.05
22. The Lake Forest Graduate School of Management staff was available, professional, and responsive to my needs.	4.44	4.65	4.87	4.13	4.52
23. The meals during the workshop provided an adequate variety, amount, and were tasty.	4.03	4.35	3.94	3.92	4.06

Course	May 2007	June 2007	July 2007	August 2007	Average
Strongly Disagree = 1					
Strongly Agree = 5					
24. The e-mailed pre-work packet was of help in planning for this workshop (timely, informative, clear and precise).	3.80	3.95	4.19	3.96	3.98