



Case Studies

Medea International Limited

Deloitte Austria

Pursuit Strategy Lead

The client

Inga Hebdon was a Senior Manager in Deloitte's Global Audit & Assurance Service Line and worked in the capacity of a Global Pursuit Strategist. During her employment she was tasked with supporting Deloitte Austria in its pursuit of three major upcoming audit tenders. The audit tenders were with the firm's most prestigious clients which are also some of the biggest corporations headquartered in Austria.

The challenge

All three tenders were more than a year out before the expected RFP release and whilst the consulting arm of the firm had overall good contacts into the client organisations, the auditors had very limited exposure to the relevant stakeholders. Teams and resources weren't built and agreed, a strategy wasn't set and general sense of urgency and understanding for early client engagement was missing. In addition there was a level of mistrust displayed by some audit partners.

The solution

Ongoing support for all three audit tenders in the form of strategic and operational pursuit leadership. This entailed facilitating workshops with partners and senior members of the firms as well as other international colleagues to establish the status quo of each pursuit, conduct competitor analyses and create and agree plans for value driven client engagements. Constantly monitored and challenged the progress made and redirected efforts if needed. Supported the teams' resource planning and execution plus developed and redefined the winning propositions over time. Further critical reviews of material created were conducted to ensure consistency with value proposition. In addition managed extra graphic design and knowledge management resources and directed the application of the agreed graphic designs. Coached throughout on pursuit methodology and best practices regarding impactful client engagements and prepared the teams for the delivery of their final client pitches.

The result

Deloitte Austria won two out of the three audit tenders with a combined revenue of over 10 million Euros whilst the third pursuit was qualified out without jeopardising the client relationships - in fact better and more relationships with that particular client organisation were established. The firm now has a blueprint for a successful pursuit process, the involved partners and other senior stakeholders of Deloitte Austria have improved their impact and communications skills.

"We have met Inga in a strategic pursuit situation being of utmost importance for our firm. Inga stepped in much quicker than expected and pushed us to go far beyond our initial limits. She was demanding when she had to be, precise when required, always hard working, and nice and charming in rainy times. The outcome of her work was excellent. We owe Inga a thick proposal book, a beautiful handout and a convincing verbal presentation. Great job. Thank you Inga."

Dr Gottfried Spitzer – CFO and Audit Partner Deloitte Austria

Deloitte Turkey

Pursuit Training

The client

As a Senior Manager at Deloitte Global, Inga Hebdon was working for the Global Audit & Assurance Service Line as a Global Pursuit Strategist. During her employment, the Audit & Assurance Service Line of Deloitte Turkey required the support of pursuit professionals from Deloitte Global to prepare for a surge of upcoming audit rotations in their market.

The challenge

Facing a surge in upcoming audit rotations in their market with the need to win new audit clients in order to sustain or even grow the service line. In addition the Turkish Member Firm had lack of resource and expertise in the area of bid/pursuit management, including an unsophisticated and reactive pursuit process.

The solution

The solution was a three-step program. The first step was support in form of coaching on client categorization, including sharing best practices from other member firms and providing tools to help with the task. Secondly key individuals of the firm were trained on a diagnostic tool to perform an RFP-Readiness Self-Assessment for each of the identified key client accounts. The third and final step was the design and facilitation of a full day interactive face-to-face training workshop in Istanbul for circa 50 of the firm's partners and directors, grouped according to sector expertise and relevant client accounts. The interactive training workshop covered following:

- Pursuit methodology and how early client engagement impacts the win rate
- Assess the opportunity and develop a winning strategy
- Resource planning
- Develop pursuit /bid plans

The result

The program led to operational readiness. Deloitte Turkey now had decided which client accounts they'd prioritize as potential audit clients and implemented a pursuit process for their Audit & Assurance Service Line. In addition a pursuit strategy was in place for each of their key client accounts, resource planning for the next six months was completed, roles and responsibilities agreed and assigned. The partners and directors also developed account, bid and client engagement plans during the workshop with committed actions to complete in the coming six months.

KPMG

Pursuit Diagnostic & Win Rate Improvement

The client

During her employment at KPMG, Inga Hebdon supported various tenders for consulting work at a British multinational electricity and gas utility company leading to diagnosing the effectiveness of the account team's pursuit process.

The challenge

The British multinational electricity and gas utility company was considered as a key account for the UK member firm with aggressive growth targets. The client organization had a demand for various advisory services and kept issuing RFPs allowing only very short turnaround times. The account team responded to nearly every tender but won very few of the engagements.

The solution

Supported the account team on multiple consulting opportunities for three months in the role of a Pursuit Leader, eg in the development of sales strategies and winning propositions in competitive global bid situations. Coached, challenged and advised partners and senior members continuously on valuable client engagement and delivered extensive pitch coaching. At the same time investigated the effectiveness of the account team's pursuit process as a whole and on tenders not directly supported. After three months of monitoring and investigating the account team's sales efforts, performed a gap analysis and created an action plan with specific recommendations of what to improve and how.

The result

The analysis of the account team's sales approach resulted in the team being more strategic in the opportunities they pursued and the implementation of a rigor bid/no-bid decision process. This not only increased the motivation and commitment of the team members to work on specific opportunities but increased the team's overall win rate to >50%.

Health Sector

Pitch Workshop

The client

Inga Hebdon delivered client billable work during her time at KPMG in form of a full day of pitch preparation with guidance on personal impact to a healthcare solutions provider.

The challenge

Client struggled to turn opportunities into wins and their communication skills were letting them down when they were required to pitch for major work. There was a feeling that they were far less compelling and failed to translate their solutions and services into their clients' language. In addition they knew that their way of presenting was outdated ("death by PowerPoint") but didn't know how to change.

The solution

Designed an interactive pitch workshop based on a specific tender situation the client was facing. The components of the workshop were:

- Teaching on what good looks like when it comes to pitch preparation
- Coaching impactful introductions and a powerful openings of a presentation
- Training participants on concepts of rigorous audience analysis and how to use the knowledge in their communication with the audience
- Practice delivery

The result

Significant improvements in the quality of the way they present and increased confidence in their ability to get their message across. In addition the client made big steps towards their readiness for their upcoming pitch as they created compelling messages tailored to the audience they would be facing, developed impactful personal introductions and came-up with a new narrative and top-line messaging for the entire pitch. The implementation of a pitch prep playbook was agreed.