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The Challenge



Summary:

Client: Pinsent Mason

Sector: Law

Organisation Size: 430 partners + 3000 advisers

Services Provided by Balance Global:

Creation of:

- Bespoke trainer PowerPoints and trainer guide / speaker notes
- Bespoke delegate coursebook and exercises

Learning Events:

- Deliver project planning academy courses.

The Brief

Pinsent Mason identified a business opportunity to maximise revenue through offering additional services to their existing client base. Frequently Pinsent Mason would be engaged to undertake legal activity because a client's project was not being delivered to requirements and / or on time. It would be necessary for the client to seek legal recourse against a supplier for their part in the failure to deliver.

One opportunity identified was to provide training and consultancy services to clients at the commencement of project work, that could potentially reduce the likelihood of client's projects failing and / or ending in litigation activities. The ultimate goal was to establish an entity called the 'Planning Academy'.

- Balance Global were invited in to specifically look at the arena of develop and deliver training interventions for project planning.

Primary Challenges

- **Economic** – clients can be reluctant to pay for training that does not lead to an accredited qualification. Therefore, a close eye would need to be maintained on the ultimate cost that could be realistically charged for attendance on a non-accredited course.
- **Technical** – Pinsent Mason are experts in legal matters but not in the arena of project delivery. Pinsent Mason needed to establish credibility in a new arena of services.
- **Social** – Pinsent Mason's client base spans diverse industries and potential delegates were not envisaged to have any existing knowledge of any particular project management methodology. It was important that courseware delivered would be very jargon-free and accessible to all.

The Journey



Key personnel at Balance Global have practical ‘hands-on’ experience of planning and delivering projects across diverse industry sectors, in addition to being an ATO (Approved Training Organisation). The ATO status means that we have access to the syllabus and core materials for many best practice guidance’s and are experienced in constructing training materials appropriate for the target audience. Two of the accredited courses we referenced were the accredited ‘Project Planning and Control’ guidance and the PRINCE2’s product-based planning technique.

To supplement assigned Balance Global internal personnel, a planning expert from NASA was brought into the team to add even more credibility and gravitas to the service offering.

Once the team was established, a week was spent initially brainstorming the course structure, contents, and class exercises. Balance Global sought to include not just theory, but many examples of lessons learnt to provide added value and more depth to the materials.

Balance Global then spent a couple of weeks further developing an initial release of 2 sets of materials, one to be run over 2 days, and another to run over 5 days, giving Pinsent Mason and their clients a choice.

A pilot course was run to test the materials on internal Pinsent Mason personnel and provide them with the required knowledge to start marketing the new service.

After the pilot course was completed feedback was gathered and incorporated into a second release of the training materials for broader commercial use by Pinsent Mason.

Balance Global delivered the course to an additional couple of cohorts before Pinsent Mason decided they were sufficiently experienced to deliver future courses using their own internal staff.

Outputs, Outcomes & Benefits



Outputs

The following were delivered on time: -

- 2 variants of the courseware (2-day and 5-day options).
- High quality delegate course materials (delegate coursebook, trainer materials with speaker notes / trainer guide and course exercise hand-outs)
- Delivery of pilot course – 8 delegates attended the full 5-day course.
- Feedback incorporated into release 2 of course materials.
- 2 further (5-day external client) cohorts were delivered by Balance Global personnel.

Outcomes

The Pilot course enabled key Pinsent Personnel to refine and market the new service offering. Refined materials used of additional cohorts enabled initial client feedback to be incorporated in marketing activities and provided a 'story to tell'.

Benefits

Pinsent Mason achieved the following:

- A new high-quality service offering.
- Credibility in a new arena that was not beforehand part of their core business.
- Sufficient materials, experience, and credibility to be able to launch the planning academy.