

Axon Incorporated



*Message Driven Visual Communication*

# THE BUSINESS CASE FOR SOLO

*A Management Perspective*

SOLO™  
VISUAL COMMUNICATION

## EXECUTIVE SUMMARY

Client communications are central to a consulting firm's success. They shape client perceptions of the quality of the firm's thinking. They influence clients to adopt or question the team's recommendations. And they account for about 25% of total project cost - a substantial bottom-line factor.

Communications within the team are also central. Problem-solving must be well managed and efficient so that client buy-in can be effectively moved forward.

The Solo system supports both kinds of communication, and provides a superior solution to the complex report production requirements in today's consulting practice. Developed by a former McKinsey & Company consultant, Solo is anchored in the principles of effective project management: It helps the team move from initial hypothesis generation to problem solving that confirms hypotheses, and it enables the team to inform the client continuously as the thinking develops.

Solo's primary view is the storyboard. It focuses the team from the beginning on the project storyline. It also keeps data gathering and analysis on target by constantly emphasizing the connection between analysis and conclusions; teams using Solo develop many fewer extraneous exhibits.

To support the storyboard, Solo contains a deep library of consulting graphics that can express most quantitative, conceptual, or textual messages. Using the library, consultants are able to generate their own presentation over the course of the project, mostly on a point-and-click basis. And because Solo builds in format support, it automatically applies the firm's visual standards across offices - which communicates unified, rather than fragmented, thinking to the client.

Net net, Solo represents a strategic vs. a technology decision. And the bottom-line impact is compelling. Solo reduces direct project cost by 6% to 10% and likely saves at least as much in indirect costs by accelerating client buy-in and reducing unnecessary data gathering. This document explains how the Solo system delivers these productivity leaps and concludes with an analysis of its bottom-line economic benefits.

## THE BUSINESS CASE FOR SOLO

Every experienced management consultant understands that a successful project should embody a seamless flow of problem solving and communication.

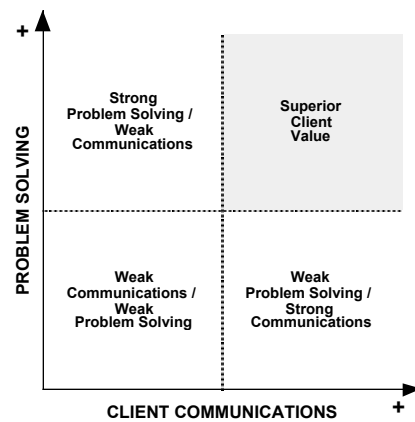
But, in the real world, there is often an expensive and telling discontinuity between problem-solving and client communication. The consequences are significant and reflected in the firm's performance: Our work and client studies have shown that the client communications process accounts for about 25% of total project cost - a core bottom-line factor.

Even more costly is the potential impact of weak or confused client presentations on a firm's image and potential for follow-on projects. Although they recognize client communications as a core activity, few consulting firms feel they are managing the process well.

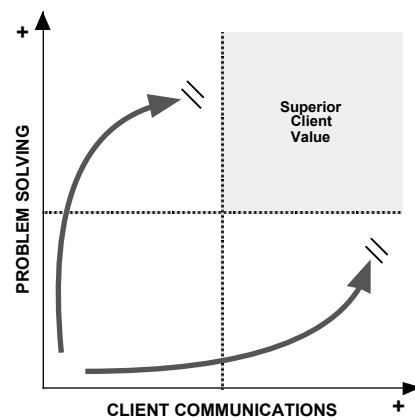
This is what we have observed about the underlying causes of the discontinuity:

In an effort to bring an assignment in on budget, project managers often fail to structure the problem-solving process up front. Instead of framing hypotheses for the team to test, they launch the team straight into analysis. Junior consultants and researchers, armed with laptops and presentation software, industriously produce charts that display findings. And then, during the week before a presentation, the project manager struggles to pull together the communication, develop the messages, and order the data and insights into a compelling, coherent, fact-based argument that will move the client to action, or fully inform him of the progress to date.

*Creating meaningful client change is a function of combining problem solving and client communications skills...*



*However, what often happens is an expensive discontinuity between problem solving and client communications, or an aggressive communications effort that is weak in substance*



Paradoxically, the manager often finds he has both too much and too little information. Too much in that large amounts of the data and analysis do not support the essential story line. Too little in that support for key arguments is missing.

During the last week, costs mount rapidly and stress is high. Worse, the resulting presentation is rarely as good as the team hoped it would be - and that is a concern for the whole firm. The bar for consulting performance is constantly being raised, and you seldom get judgment of superior quality at the last minute.

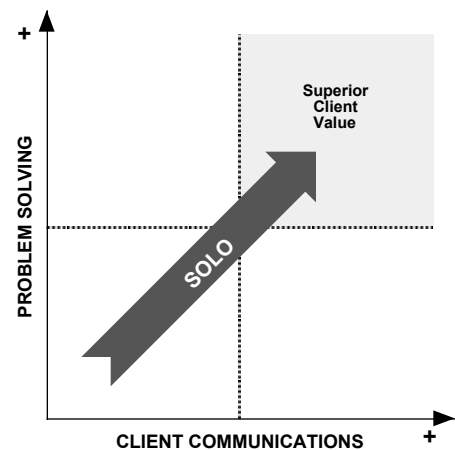
The problems of discontinuity are exaggerated by the complex operating environments of large consulting firms. Project teams are often working to develop their argument in different cities and across time zones. Project managers are riding herd on not one presentation development process but three or four, and the possibilities for confusion are myriad. Moreover, if those different locations also use different presentation formats, the final report's appearance alone can communicate a fragmented, disorganized approach to problem solving that will make the client question the recommendations.

These challenges, and the inability of general-purpose presentation software to meet them, sparked the development of the Solo system by a former McKinsey & Co. consultant and a senior report production specialist.

The result: Solo delivers breakthrough productivity in lifecycle client communications costs - providing a payback period of less than three months - and ensures high-quality visual communications. Here's how:

- Solo gives project managers a storyboarding tool that focuses the problem-solving effort on hypothesis generation and testing from the beginning. It forces more thinking up front.

*Solo solves the discontinuity problem by providing a single environment that combines problem solving and client communications processes into a single, focused effort.*



- Solo forces junior consultants and researchers to articulate the “so what” of each piece of analysis as they document it, and provides a Visual Vocabulary™ that translates conclusions into powerful and persuasive images. Exhibits are anchored in insights, not unconnected data.
- Solo continuously creates a current version of the presentation - combining new and annotated slides coming from a distributed team working across geography and time zones - available at all times to team members.
- Solo incorporates and manages proprietary firm formats, at whatever level of detail desired, so that client-ready exhibits are automatically produced and consultants are not distracted by design, layout, and customization concerns.

These benefits have already improved the quality and reduced the stress and expense of both problem-solving and client communications in large, international consulting firms.

## KEEPING PROJECTS ON TRACK AND WITHIN BUDGET

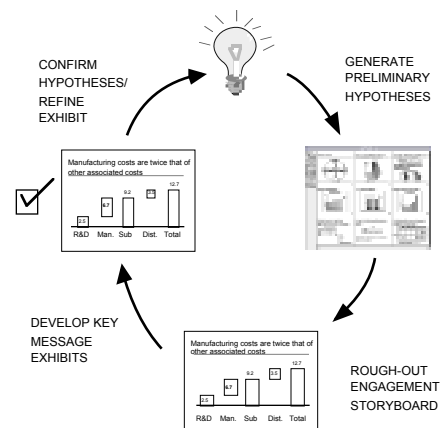
Solo's storyboarding feature encourages the up-front thinking that is key to both problem-solving and communication - both within the team and with the client, throughout the engagement.

When the project manager uses it early to lay out preliminary hypotheses and explain to the team the types of analyses needed to support each one, each team member understands his or her mission and can communicate it to the client personnel involved. Having proved one hypothesis satisfactorily, analysts can move on to the next. If the data contradicts a hypothesis, junior consultants can take it immediately to the team leader for guidance. This optimizes the team's productivity.

As the engagement progresses, hypotheses are refined. The storyboard forces the team to focus continually on the big picture: How is the analysis adding up at any point in time against the problem the client has asked us to solve? With this aid, gaps are identified soon enough to fill them with high-quality analysis - while unnecessary analysis is avoided, because it has no place in the story.

The payoff, although actually continuous, is most visible when it is time to write the report. Having begun with a storyline and mapped out the analyses to support it, the team has been writing the presentation from the beginning. The logic is all there; it has been refined over the months of work; all that's needed is fine tuning. If different team members are presenting their work, they already know how their analyses fit together to solve the problem because they have been thinking that way all along.

*Having begun with a storyline and mapped out the analyses to support it, the team has been writing the presentation from the beginning. . .*



## TRANSLATING ANALYSIS INTO PERSUASIVE IMAGES

Each member of a team that uses Solo carries the whole draft presentation with him or her from the beginning, and the mission of junior consultants and researchers on the project is to develop the data and visuals that support each message in the storyboard. Thus, data are always informed by judgment; there is no place to present findings without articulating their consequences for the client's situation.

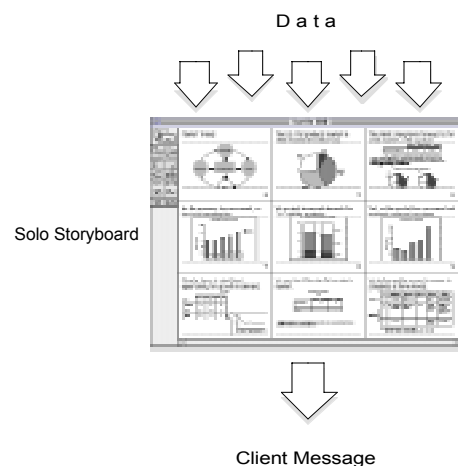
This avoids the classic consulting presentation problem where a set of findings, observations, or seemingly-related data is presented outside the context of a coherent argument.

Moreover, the Solo visual library provides the consultant with a broad array of usable and useful consulting chart forms. These charts include not only the standard options for presenting narrative or quantitative conclusions but also "concept" charts, which consultants often use to visualize stages of a process, interacting or interdependent forces, logic trees, etc.

The team that designed these charts came out of a major international consulting firm, and the current library incorporates literally tens of years of senior consulting and visual communications effort. As a result, Solo offers your teams a set of great-looking "likely candidates" for virtually every message they need to visualize.

Of course, your firm may have proprietary knowledge or proprietary frameworks that your own graphic design group has visualized. Solo enables you to capture this intellectual capital in a powerful, high-precision graphics environment, organize it within the Visual Vocabulary™, and disseminate it efficiently throughout your firm. Like the standard Solo

*Solo provides a focusing mechanism to transform data into message...*



exhibits, your proprietary charts will always communicate quality.

Each of Solo's chart templates has been proofed by a senior design expert for legibility and clarity. This allows consultants to focus on the message, not the format - another force for consultant productivity. Anyone who has struggled with typefaces, chart shadings, boxes or clip art understands how much time such cosmetic concerns can eat up. Consultants feel productive when they are designing visuals, but their effort is misplaced. They should be thinking about the problem and the solution, not the chart form.

## CREATING A SINGLE-TEAM SOFTWARE ENVIRONMENT

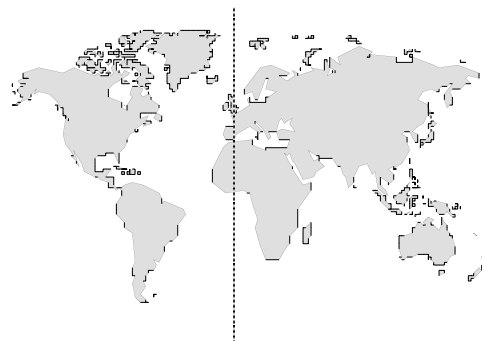
Solo helps keep a distributed team on track with automated report integration capabilities that automatically compile the most current version of a report, regardless of the geographical location of the contributors.

Each exhibit carries a unique serial number, and each iteration receives a global (GMT) time stamp. Assuming that the team has the necessary electronic linkages, Solo sorts through all iterations and provides each consultant or report production specialist with the “state of the presentation” each time they open the file. The project manager never has to wait for the most recent draft of the report, and when it's ready the production department can start printing as soon as they receive the order.

The slide-specific serial number and global time stamp also help solve such classic last-minute production problems as the loss of exhibits, the use of outdated versions of exhibits, and the frustrating inability to “see” the whole presentation. Solo's “smart assembly” capability combines the independent work of several team members - instantly.

And for client leave-behinds, presentations done in Solo can be exported to standard software packages such as PowerPoint, Persuasion, and Freelance.

Solo works interchangeably on Macs and PCs. Both the Macintosh and Windows versions of Solo use the same software code base. This ensures that all new versions of Solo are 100% compatible between platforms. The technical architecture of Solo is also elegant - taking up less than 12 MB of disk space, and producing compact presentation sizes - increasingly significant in today's world of electronic document transfers.



Solo GMT

## ENSURING THE FIRM'S "VISUAL SIGNATURE" - GLOBALLY

Client reports carry the image of a consulting firm. They are its "visual signature", and they should always by their appearance reinforce the clarity and coherence of the problem-solving effort.

However, hasty report production - which sometimes includes the creation of ad-hoc formats for an entire presentation (or worse, for individual slides) - often weakens a firm's signature. Errors and inconsistencies create an impression of fragmented thinking, which at best distracts and at worst confuses, making even an elegant solution seem mediocre.

The Solo system helps ensure a consistent firmwide look. Formatting operates naturally as a background supporting process, relieving the pressure (and temptation) to invent new formats constantly.

Solo formats communicate coherent, focused messages that are easy to absorb, and Solo's architecture allows each firm to decide how much standardization is enough. Some firms choose to control each type of exhibit closely. Others standardize formatting at the frame or overall layout level.

Once the choice is made, Solo manages the formats "under the hood", so that what is designed once can be executed many times, automatically. Consultants and report specialists are free to concentrate on content.

The result is a consistent visual format, regardless of who develops the exhibit. And, as firm formats evolve, or new exhibit types are created, adding those formats to Solo is simple. Thus, Solo maintains and strengthens a firm's visual signature over time.

## SOLO DELIVERS COMPELLING BOTTOM-LINE ECONOMICS

The cost of client communications has both visible and not-so-visible components. The visible, or direct costs primarily reflect the time of consultants who create and edit reports and the time of report production specialists who support the consultants. The less visible, or indirect costs involve the time it takes to achieve client buy-in once the communication is presented. Solo leverages both.

### DIRECT COSTS

Our experience and client studies have shown that the direct costs of client communications account for about 25% of total project cost.

Our client experience has shown that Solo creates a 25% productivity increase among both consultants and report production specialists in the communications phase of a project. Moreover, some studies have shown a 50% to 100% increase in report production productivity. As the accompanying table shows, this equates to a payback period of less than three months. By cutting the direct costs of client communications, Solo provides total project cost savings in the 6% to 10% range.

### INDIRECT COSTS

But that is only the beginning, because Solo also attacks the costs that surround the actual report production process. The most obvious of these are the time spent on last minute course corrections, or eleventh-hour crunches to generate the data required for key exhibits, or multiple (and stressful) report revisions as the team shuffles and reshuffles pages and rewrites leads to develop a compelling story-line the night before the presentation. Such costs can equal or exceed the direct costs of developing client communications.

### Solo Payback Analysis (direct costs only)

	Consultant	Graphic Artist	Assistants
Annual Salary	\$125,000	\$35,000	\$35,000
Report Production Time	25%	80%	25%
Productivity Increase	25%	25%	25%
Annual Savings	\$7,813	\$7,000	\$2,188
Savings/Month	\$651	\$583	\$182
Time To Payback	1.5 mos.	1.7 mos.	5.4 mos.
Combined Time To Payback			< 3 mos.
Office-level payback: 100 consultants, 20 secretaries and 5 graphic artists Total Annual Savings = \$859,860 Equivalent to 10.5% reduction of annual salary cost assumes per copy cost of Solo at \$1,000)			

But behind these costs is another element that every consulting firm is working to minimize: the time it takes to gain agreement from the client, and permission to move forward with implementation or follow-on work.

Every firm suffers to some extent from the misplaced energy syndrome: “There’s never enough time to do it right, but there’s always time to do it over”. “Doing it right” in client communications means a continuous effort to ensure client buy-in.

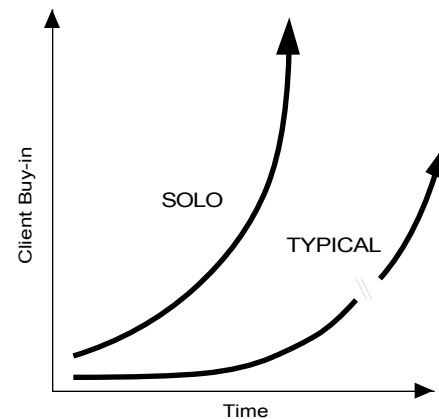
Why should the effort be continuous? Because clients often need time to digest information. When a team delivers its recommendations - together with their possible surprising or upsetting analytical support - all at once at the end of a project (or major stage), they risk creating unpleasant surprises.

The need to dot the i’s, cross the t’s, follow up on questions, and convince reluctant clients of the validity of data or analysis after the presentation or recommendations can extend the length of a project and reduce client satisfaction.

Solo can help teams avoid these problems by generating continuous, incremental client briefings that are professional and conclusion-oriented, thus continuously demonstrating both the analytic ability and judgment of the team. A well put together exhibit simply carries more weight than a sketch, and such briefings can bring the client’s thinking along step-by-step.

This approach is particularly well suited to teams that mix both firm and client staff. And it demonstrates on a daily basis the productivity of the project.

*SOLO facilitates earlier client buy-in by making it easy for consultants to share insights continuously*



Moreover, on the day of the final presentation, a client who has been briefed along the way is far more likely both to accept your key points readily and be interested in moving forward with your recommendations, next steps, or follow-on work.

Client momentum is a powerful force, and Solo can help you create it. That could affect your bottom-line too - and not just by reducing costs.

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If you would like to discuss how Solo might contribute to your bottom-line economics, please call Susan Rhame at (203) 662-8713.

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