# Prior Learning Assessment and Recognition (BMPF7109)

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**Word count: 8,244**

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# 1.0 Introduction

I will use Key Account Management (KAM) as the Learning Area for this submission, being the proposed subject area of my D.Prof research, currently, “How Key Account Managers (KAMgers) and senior sales people can increase their impact and effectiveness, for high performance, through adopting self-ordered and self-transforming mindsets in the post-Covid-19 and evolving digital business and Artificial Intelligence (AI) environment.”

I will demonstrate Learning Outcomes in the context of my recent consulting assignment, which needed effective application of KAM to successfully deliver my client’s required outcomes. I will also draw upon learnings and insights gained throughout my career using applied critical reflection (Brookfield, 2009, p.297) and single and double-loop reflective learning (Agyris and Schon, 1996).

I am currently bound by a formal confidentiality agreement, so will provide redacted Evidence, which I will refer to throughout the submission using code: Evidence Exhibit (number) (*EE (number))* in Section 8.0 Evidence of Prior Learning

***Note: when reading Section 6.0 Learning Area and Learning Objectives, please read the relevant EE for appropriate context and evidence.***

# 2.0 Professional Experience

The main themes of my career have been leadership of business growth through go-to-market, including marketing, sales, KAM, proposition development, digital transformation and creation of value for shareholders and members in complex organisations.

I am a self-employed management, business consultant, programme, project and general manager. The value I deliver depends on my clients’ requirements and needs. It is necessary for me to be agile, cross-disciplinary and adaptive in order to create and deliver value and therefore, not easy to pigeonhole myself within a specific career role. My formal qualifications are primarily in general management, marketing and project management.

# 3.0 Curriculum Vitae

*Commercial, insightful, people-oriented business leader, with a successful track record of business growth. Experienced in strategy, complex value proposition development and go-to-market for digital transformation. Strong and mature consultancy, key account, programme and project management capabilities.*

**EKFB JV – HS2 Tier 1**

**Programme Consultant (Consultancy via Agileeto for GPS Consulting)**
**Oct 19-Dec 2023** *Major Infrastructure project. Responsibilities: KAM and greenfield delivery of best of breed, technology, SaaS, IoT, big-data insight and AI performance solutions. Team: circa 65.*

- Pioneered the complex sale and delivery of a strategic data insight, digital-twin and AI capability producing £millions in efficiency and avoided costs, transforming key construction processes.
- Procured, implemented and ran a £42m programme of SaaS best-of-breed cloud-based technology applications.

**Finning Caterpillar**

**Business Development Director (Consultancy via Agileeto)** **Jul 17–Aug 19**

*Led KAM and business development, performance solutions proposition development, delivery and commercial negotiations for c.£60m+ solution. Team c.30.*

- Co-created Internet of Things (IOT) performance management solution, digitally transforming major construction earthworks, driving 30%+ productivity and efficiency gains. Led key account relationships and achieved multi-£m in complex sales.

**Onwave**

**Director - Business Growth (Consultancy via Agileeto)** **Feb 16–Mar 17**

*Led rapid growth of highly innovative telecoms network integrator. Won new major accounts.*

- Delivered growth in key accounts in the construction and utilities sectors of up to 30%.

**Agileeto**

**Director and Principal Consultant** **Oct 15-Present**

*Consultancy focusing on growth, business improvement and change by providing programme/project leadership, strategy, go-to-market, digital transformation and change.*

- Established and built relationships, leading to long-term client engagements.
- Created and delivered significant value for clients in telecoms, IT, digital technology, construction and software sectors.

**BT Global Services**

**Head of UK Utilities Sector** **Feb 13–June 15**

*Sales Leadership, Key Account Management and New Business Development. Led sector P&L, proposition and solutions, marketing, business development, key account management, sales into UK Energy, Utilities and Renewables. Team: 10, Virtual team: 100+.*

- Transformed the value proposition and re-launched the utilities business, building new key accounts and executive relationships across all sectors.
- Delivered: qualified pipeline c.£120m, revenues: £30m+ and £4m+ incremental in Yr.1, improved EBIT.

**Head of Key Account Marketing & Sales Enablement, UK Corporates** **May 10–Feb 13**

*Led: strategy, proposition, channel and account-based marketing and key account sales enablement.*

- Delivered strategic business unit go-to-market plans for three divisions driving combined solution and revenues of £3.2bn+, engaging salesforce of c.700.

**Global Head of Marketing & Sales Enablement - Outsourcing** **Nov 07–May 10**
*Led global outsourcing proposition, thought leadership and sales enablement in support of global/national Key Accounts.*

- Built proposition, account based marketing programme and sales enablement, content and tools used by 1800+ sales, supporting 200+ major bids with £1bn+ revenue generated.

**LogicaCMG**
**Global Marketing Director, Global Services Delivery**
**March 05–Oct 07**
*Reporting to Global Sales and Marketing Director, led marketing for global outsourcing business, responsible for global propositions, all aspects of marketing.*

- Led global vision, integrated marketing strategy and comms. programme, moving LogicaCMG to EMEA leadership position in IT outsourcing, in <18 months, delivering £400M+ revenue in Year 1.
- Managed key account relationships with market analysts and thought leadership organisations including business schools, consultancies and professional bodies.

**Marketing and Global Business Transformation Director** **Nov 04-Feb 05**
*Reported to Senior Director. Responsibility: leadership of UK Marketing and global workstream which transformed global go-to-market practices for key accounts. Created a function of 600+ people. in multiple countries.*

- Led work-stream to build global Business Creation. Delivered: 60% cost savings.

**Mercantile Building Society**
**General Manager, Executive Board Member** **Jul 03–Nov 04**
*Report: CEO. Responsible for Society's general management, strategy, marketing, sales channels, business partnerships and customer services. Team: 130.*

- Delivered business transformation increasing lending and savings by circa. 35% and 30% respectively and insurance revenues 15%.
- Key account management of business introducers, increasing lending business by circa. 40% of the Society's lending.

**Independent Consultant**
**Various Clients** **Feb 03–Jun 03**
*Self-employed interim role. Clients: Principality Building Society, Warwickshire College.*

**Gemini Consulting and Cap Gemini Ernst and Young**
**Senior Management Consultant – Financial Services** **Jan 01–Jan 03**
*Provided consulting, project management and technical financial services expertise to senior managers (blue-chip clients). Specialisms: Key Account Management, business strategy and transformation.*

**Staffordshire Building Society**
**Executive Manager (Strategy and Marketing)** **May 98–Jul 00**
*Reported to the CEO. Team: 25, personnel: 1600, branches: 52.*

**Coventry Building Society**
**Group Product Marketing Manager** **Oct 93–Apr 98**
*Reported to Deputy CEO, responsible for marketing and product management.*

**Education**

| | | |
|---|---|---|
| MBA General Management | Huddersfield Business School | 1994 |
| MSc Marketing Management | Nottingham Business School | 1998 |
| PG Diploma in Digital Marketing (L7) | Institute of Data and Marketing | 2015 |
| Graduate Diploma in Marketing | CIM (Manchester Business Schl) | 1997 |
| Praxis Practitioner (Project Management) | APMG | 2021 |
| Agile Project Management | APMG | 2021 |
| Scrum Foundation | APMG | 2021 |
| Certificate: IT Service Management | ITIL | 2006 |
| Banking Diploma (Associate) | Chartered Institute of Bankers | 1984 |

## 4.0 Job Description

I do not have a formal Job Description, as I work as a self-employed management consultant. My work is shaped by the challenges clients ask me to address.

I have prepared and briefly annotated a Job Description focusing on consulting, client management and KAM in the context of big data, insight, AI and digital technology. It has not been possible to annotate all aspects of the Job Description, due to word count restrictions.

**Job Title: Client Account Director and Principal Consultant**

**Role Overview:**

Extensive experience in providing direction to clients and key account leadership, within complex environments. Encompasses a broad range of knowledge areas including but not limited to, business transformation through go-to-market, Big Data, AI, IT and digital Technology.

Responsible for driving dynamic business value, problem solving and cultivating valuable commercial relationships with key clients and partners. Demands strategic thinking, problem solving, technical expertise, exceptional delivery, stakeholder management, influencing and communication skills.

**Main Responsibilities:**

**Strategic Account Planning:**

- Build a deep understanding of the client and client's industry, anticipating challenges, offering insights and creating value-adding solutions.
- Identify and develop new business opportunities, which align with consulting, technology and transformation solutions.
- Ensure account profitability and growth through focus on value creation and effective delivery and resource utilisation.

**Consultancy and Advisory:**

- Build knowledge of industry and technology trends and advise and influence clients on strategic and tactical needs, issues and opportunities.
- Co-create solutions and propositions.
- Lead and participate in client sessions, demonstrating thought leadership and relevant subject matter expertise.

***Annotation:*** *I held a strategic vision and used it as the motivation and rationale for pioneering and championing a concept or solution. I formed a clear vision of the transformational impact and benefits the chosen technologies could potentially deliver for my client. I applied previous learning by holding the vision and having the courage to champion the technology. Many times, I have proved the power of vision and of "starting with the end in mind" (Covey, 2005).*

**Co-create Value with Clients and Partners:**

- Lead the client through complex problem solving and definition of requirements.
- Collaborate with business and technical teams to define requirements and build tailored solutions that create and deliver value.
- Specifically provide guidance on digital transformation and the implementation and optimisation of Big Data, AI, IT and digital technology solutions.

***Annotation:*** *I used co-creation, both in terms of proposition and product development as well as in the context of problem solving. Co-creation resulted in me facilitating joint deep-dive sessions enabling the team to rapidly identify root causes, pain points, data and process inefficiencies which helped the client clearly define root-cause problems and ingest, clean and analyse over 360 data sources to understand data quality, duplication, gaps and conflicts.*

*I initiated collaboration sessions between the Consultants and Client's teams, to begin the process of refining data and re-defining processes. To ensure adoption of the systems by users, I deployed resources with specialism in nudge theory and behavioural economics to ensure users were fully involved throughout, had ownership and were fully trained prior to operational tools being made live.*

**Client Relationship Management:**

- Develop and nurture long-term, strategic relationships with clients.
- Act as the primary contact and advocate for clients within the organisation.

- Address and resolve client concerns promptly, maintaining high levels of satisfaction and continually demonstrate value creation.

***Annotation:*** *Trust and respect is essential to success, but is hard earned and easily damaged. Relationships need to be nurtured and built and must be based on an exchange of value. I planned and invested in my client relationships at all levels to become the client's trusted advisor. I placed value creation and the building of trust at the centre of my day to day work.*

**Leadership:**

- Champion value-adding concepts and influence clients at senior levels on strategic decision making and problem solving.
- Lead and mentor consulting and client teams, fostering a culture of high performance, knowledge sharing, a focus on value and continuous improvement.

**Annotation:** *I "assumed the position" as leader of this initiative and ensured that I was clear and confident about my goals and the path to achieving them. This led me to pioneer and drive the concept, keeping it alive when the business did not see the value. I recalled the power of leadership and the courage which at times it requires and went for it, believing I was operating for the benefit of my Client's business and the overall project.*

**Project Delivery:**

- Effectively scope projects and obtain the necessary budgets and resources.
- Deliver projects on time and to budget which deliver Clients' expected value.
- Oversee the project lifecycle, ensuring timely delivery and client satisfaction.
- Lead teams of consultants, monitor project progress, and mitigate potential risks.

**Growth, Commercial and Supplier Management:**

- Through complex selling and key account management builds strong client and partner relationships.
- Utilise procurement and commercial expertise to ensure value for the client and profitability for the consultancy.
- Where appropriate, act as the ambassador of the customer to the supplying organisation.

**Required Competencies:**

**Strategic Thinking, Influence and Leadership:**

- Demonstrate insightful understanding of the clients' industry, business, competitors and stakeholders needs.
- Produce and execute comprehensive strategic account plans aligned with client objectives.
- Influence, persuade and negotiate to optimise Client value and satisfaction.
- Demonstrate strong leadership in contract negotiations and oversee contract renewals

- Apply highly developed analytical and problem-solving abilities including creativity and innovation.

**Stakeholder Management:**

- Demonstrate highly effective engagement with key stakeholders at all levels.
- Display ability to build the trust of clients, and to maintain positive relationships
- Exhibit ability to create value, solve problems and manage conflicts to ensure effective delivery.
- Deeply collaborate with senior stakeholders at all levels and across all business functions to understand and address clients' unique needs and concerns.

***Annotation:*** *Effective stakeholder management is critical to success and I invested time and effort in planning for and engaging with stakeholders. I recognised the project was, in effect, a complex sale, with many stakeholders having the power to influence the decision group which consisted of board members and senior representatives of my client's client. I continually demonstrated progress and value and deliberately planned every next move and stakeholder engagement, and one-by-one, stakeholders increasingly gave their support. I ensured those who were unwilling to support were kept fully up to date, so did not feel alienated or rail-roaded. This helped to build confidence, clarity and trust in the technology, approach and my, and the team's capabilities.*

**Technical Proficiency:**

- Maintain deep insight into clients' businesses and critical challenges.
- Deploy expertise across all relevant knowledge disciplines including areas such as go-to-market, project leadership and big data and digital technology.
- Effectively communicate complex technical concepts to non-technical stakeholders.
- Apply strong analytical and problem-solving capabilities to address clients' challenges.

## 5.0 Overview of KAM

Cheverton (2008, p.30 as cited by Malhamaki, 2010), views KAM as: honing the quality of the customer relationship, so that understanding is enhanced and the true opportunity identified; creating competitive advantage and enhancing profitability by aligning available resources through leadership or facilitating relevant action based on the enhanced understanding. Woodburn and McDonald (2011, p.300) describe the role of KAM as: "Implementation: which involves deciding what should happen in an account and making sure it is delivered" which requires core skills of "expert in the customer, value developer and point of accountability" and "Facilitation" which involves "Developing Relationships that will enable the business strategy" and requires core skills of "boundary spanner, conduit and focal point of contact". Woodburn and McDonald (2011, pp.300-301) suggest KAMgers must keep these roles in balance "remembering that building relationships is pointless without a business purpose, but equally, that business strategies are unlikely to be realised unless the right network of relationships is in place".

McFarland and Dixon (2021, p.287), observe that those responsible for sales, which includes KAMgers, fulfil many roles and commonly experience stress. Peasley et al. (2020, p.66), suggest that over time, it can lead to burnout, unless effectively managed. Frequently the consequences are "lower levels of customer-oriented selling and lower sales performance" McFarland and Dixon (2021, p.298) and emotional exhaustion has detrimental impacts for the individual and employing organisation, whether the individual chooses to remain in employment or not (Edmondson, Matthews, and Ambrose, 2019, p.282). Through leading and acting as a KAMger, academic and professional learning and reflection, Ormston (2023, p.9) concluded that KAMgers: "appear to primarily learn through experience; are under continual pressure to deliver results, leaving little capacity for alternative forms of learning, including reflexivity; are generally under-developed in their ability to undertake deliberate, self-directed learning."

## 6.0 Learning Area and Learning Outcomes

**Learning Area:** Using Key Account Management, Relationship and Self-management skills, to pioneer, communicate and demonstrate the art of the possible in using data-driven decision making, situational intelligence and operational software, to solve complex problems and deliver measurable business value.

**Operational Context:** *My end client is a Tier 1 supplier with responsibility for constructing the longest section of High Speed Rail (HS2) (**EE1**). The project is complex, dynamic, highly data driven, requiring rigorous information management and decision making, significant coordination and leadership.*

*My brief required focus on a persistent problem area, with the goal of delivering £-multi-million financial efficiencies. This was a high profile, demanding consulting engagement and a complex sale.*

*As KAMger, I championed the concept of an Intelligent Operations Platform (IOP) prior to executive sponsorship, and led the sales engagement commercial and delivery phases (**EE2**). Stakeholder relationship management was complex, with over fifty senior stakeholders, a decision group of ten and joint delivery team of eighteen external software developers and consultants from Palantir and PwC (Consultants). As a consultant, I needed to strike a balance between championing and selling the technology, and providing balanced and high quality advice. Key stages were a feasibility study and live Proof-of-Concept (PoC). Skill, effort and commitment were required to bring my Client to a £-multi-million invest-to-save decision.*

I will provide cameos relevant to each Learning Outcome and describe how learning, change and improved performance was delivered through a process of Reflection, Reframing and Redesign.

I will refer to Witherspoon's (2014, p.263), Double-Loop Coaching for Leadership Development. I used this to reflect on my thinking and actions to help progress the sale, manage relationships and deliver a successful PoC. A summary of the tool is:

**Practice 1 - Reflect:** challenge frame of reference, increasing insight, improving questions and answers and generating more options for action;
**Practice 2 - Reframe:** shift thinking with the aim of seeing and considering alternative interpretation which enable the invention, trialing and reframing of future scenarios;
**Practice 3 - Redesign:** identify the what and how to change leadership mindset and behaviours, and to design pilots to test and revise thinking, action and delivery of outcomes.

## Learning Outcomes

**Learning Outcome 1:**
**Strategically influence stakeholders to gain support, negotiate resources and deliver a feasibility study to assess the business possibilities of the technology.**

The client's data strategy is to integrate data to drive insight enabling improved decision-making and actions, reducing risk and increasing operational efficiency. The initiative was named IOP (Appendix 1). Three prior initiatives failed to receive Executive support.

Woodburn and McDonald (2011, p.300), suggest KAMs are "often woefully lacking in their understanding of the customer's business". For me, this was not the case, as I implemented the core business and operational systems landscape, and was confident in my solid understanding of the data, IT and digital technology landscape, major business processes and senior decision-making culture. The quality of data and how it was used was the root of many challenges facing the project. Agyris and Schon (1996, p.16, as cited in Clark 2021 p.37), suggest that organisational learning occurs "when individuals within an organisation experience a problematic situation and enquire into it". I believed the project was stuck in single-loop thinking, its primary focus being the building and delivery of infrastructure using traditional approaches which maintained status quo. Double-loop thinking helped me see the "art of the possible" (Zander and Zander, 2002) of big data, digital twins, insight and related operational and cost transformation. The initiative was complex, high risk/high reward in terms of its sale to the business, obtaining investment and its delivery. I needed to draw upon broad knowledge, skills and experience from many disciplines and recognised effective KAM was essential.

My belief that results are a function of attitude, competence and execution was core to my approach (Whitten and Roy, 2020). In addition, I know I am "Creative", and "Pioneering" (Glasmethod, 2023), I recognised these would be crucial qualities for project success and complementary to the growth-mindset I practice and build through hard work, effective strategies, input and learning from others (Dweck, 2017, p.1). I used these collective mindsets to lead all phases.

Pfeffer (2011) as cited in Lunenberg (2012, p.1)**,** suggests that "great leaders make things happen by utilising personal power" and Nelson and Quick (2012, as cited in Lunenberg 2012, p.2), describe power as the ability to influence someone else. Middleton (2007, p1), recognises the power of "leading beyond authority" and "earning legitimacy with ideas that resonate - and an approach to leadership that means people end-up willingly granting authority to you" (Middleton, 2007, p.2). In previous engagements, I experienced the power of well planned and targeted influence and therefore, throughout this engagement I

continually aimed to lead “beyond authority”. Using Witherspoon’s (2014) model to Reflect, I recognised my influence operated in multiple ways and levels. I took the concept from an initiative which had a couple of supporters, to the point where many senior leaders now understand its positive transformational potential and value to the business. Reframing was necessary on many occasions, to manage the changing positions of the many senior stakeholders. Redesign was continually required to effectively manage stakeholders, as they changed their position, favourably/non-favourably, as they learnt more about the technology and its cost. This required Redesign of sales engagements to more rigorously develop the value case for the technology.

Throughout all subsequent stages of the project, reframing or double-loop learning (Agyris and Schon, 1996), was undertaken jointly, to ensure that the right problem was being solved, in the right way, as the perceptions of stakeholders changed and matured. I also consistently used Weddel-Weddlesborg’s (2020 p.23) problem solving model involving “problem reframing” to understand if there was an alternative way to “analysing the problem” and “solving the problem”. Senior Leadership’s (SLT’s) lack of confidence as to whether business benefits and user adoption would be delivered led me to Reframe and seek funding from my client’s client which involved carefully crafted senior stakeholder management within both parties but resulted in investment enabling essential Discovery and Value Management to take place.

The purpose of this Phase was a feasibility study of the technology application and to evaluate the potential business value and its Return on Investment (ROI). In my experience, the feasibility study process is often multi-faceted and iterative and this is supported by Laird, (2001, cited by Mckenzie and Cusworth 2007, p.1). It was planned in detail using best practice and delivered in line with the plan *(**EE3**)*. Continual Reflection against plan, values and team-health kept this work on track and delivered on time.

Experience as KAMger has taught me that before taking action, it is essential to Reflect to identify gaps in understanding a Client’s environment, strategy, challenges, needs, organisation, clients, decision makers and other stakeholders, as this provides essential critical insights which will inform current and next steps and be relevant to future stages of the sales process. This analysis was frequently undertaken with the project team and gaps in knowledge, information and plans defined, for example, feasibility, stakeholder engagement and delivery. Nguyen, Mohammed and Panuwatwanich, (2018, p.83), recognised the relationship between stakeholder management, project phases and project complexity within major projects (Appendix 2).

Although clear values and behaviours were jointly agreed at the outset, in an early phase of the feasibility study, some tension arose between members of the two consulting firms in the Storming and Norming phase, and animosity between several members of the project team interfered with progress. I worked with the Consultants to explore how we could Reframe the values and behaviours. The exciting outcome was commitment to improve practice and ensure each member was fully accountable for his/her attitude and behaviours, and ensuring engagement between team members and clients’ personnel was continually reviewed and openly discussed within the project team and necessary actions agreed.

Reframing took place when I asked the management consultants to invite their Behavioural Economics specialists to join the team on a trial basis, to introduce team health reviews. Redesign resulted in new working practices following experimentation with several new methods and tools being adopted, including the practice of non-violent communication on which the team received on-going coaching (Rosenberg, 2012). The Reframing elevated team culture and strengthened the team's high performance with the additional benefit of understanding the potential contribution of Behavioural Economics and Nudge Theory (Thaler and Sunstein, 2008), which became a key workstream in the delivery of a PoC.

Feasibility Study results demonstrating high RoI were presented to SLT and were accepted.

**Learning Outcome 2: Lead and manage the project in order to progress with the sale and create value through a 'live' Proof-of-Concept**

On the arrival of a new Efficiency Director, although sceptical, he agreed, and forced through a 3-month duration, live IOP PoC, but with a shift in focus to address an alternative, complex and technical problem area, with the comment "if it can be made to work on this, then it can work on anything - wow us".

The PoC aimed to prove the value of: the digital twin and associated technology in driving transparency, generating new insight and improved operational processes and decision making; the power of co-creation of the solution; the application of Nudge Theory (Thaler and Sunstein, 2008) to enable user-adoption; the effectiveness of joint-collaborative delivery leadership between me as my client's representative and the Consultants and the delivery of required ROI, in form of efficiencies, increased productivity and cost avoidance. By its very nature, it was pioneering, as this combination of technology had not previously been used in UK Construction. It was an opportunity to demonstrate possibilities, learn in-action, and use double-loop learning (Agyris and Schon, 1996).

Megginson (1996, cited in Eraut 2000 p.116) described Emergent Strategy, as taking advantage of learning opportunities as they arise, where the "intent and the learning activity were deliberative, but the recognition of learning opportunities was reactive". This was the chosen approach to the PoC and I was asked to "wow" in terms of financial benefits, problem solving, functionality, learning and the Art of the Possible (Zander and Zander, 2002). This loose brief meant that as KAMger I had the opportunity to create a project domain in which the suppliers' consultants and end-users were rigorously focused on solving business problems, but with broad freedom to experiment, co-create and build ***(EE4)***. Reflecting on formal training and prior experience of delivering software and data projects, I led the project using an adaption of Agile Project Methodology and associated roles and organisation (Appendix 3) as it "combines flexible planning, robust prioritisation and collaborative practices to ensure a rewarding, business-centric focus among all project participants and stakeholders" (Agile Business Consortium, 2017). See Appendix 4 for Stakeholder and joint delivery structure and Appendix 5 for Team organisation chart.

I adopted a servant-leader style, (Jaramillo et al, 2009, p.260) which aligns with my long-term practice. As expected, this enabled effective collaboration and ensured the needs and views of the client were heard and understood ensuring appropriate and co-ordinated actions were taken. Reflecting (Witherspoon (2014), also helped fast-track the building of

trust and understanding between me, suppliers and stakeholders, as the approach was involving, non-threatening and outcomes not predetermined.

I ensured learning was a key deliverable of the PoC and was formal and informal (Eraut, 2000). Implicit Learning was used which is defined as "the acquisition of knowledge independently of conscious attempts to learn and in the absence of explicit knowledge about what was learned" (Reber, 1993). I encouraged a continuous learning and sharing culture, weekly team and individual member health and wellbeing assessments, as well as the recording, planning and application of formal learning (Senge, 1990, p.241). Drawing upon my past experiences, and belief that so much more can be achieved with a truly high-performing team (Hakanan et al., 2015, p.50).

Having previously used Co-creation to build and implement propositions and software solutions, I mandated this as the approach to product and proposition development. Ramaswamy and Gouillart, (2010) defined Co-Creation as "expanding conventional value creation" (Appendix 6). Ramaswamy (2009) recognised it proactively engages individual users as active co-creators of value and is a productive way of creating value in innovative value-adding product and service offerings, enabling new standards of communication and information productivity, through accelerated learning and improved decision making (the solution is described in **(*EE4)***. As Ramaswamy (2009) suggested, co-creation delivered improved interaction, engagement and experiences, in a "new world" of value expansion and delivery. In addition, through weekly planned interventions, I used Witherspoon's (2014) 3Rs model to help the team Reflect on progress, approach and value creation and where issues and problems were identified, we challenged each other to Reframe, by using a variety of methods, including 6 Thinking Hats (de Bono, 2008) until we achieved clarity around how the position or approach could be Redesigned. The outcome was a Large Language Model (LLM) based AI tool which saved considerable manual work and avoided costs of project delay.

Millman and Wilson (1995) as cited by Mahlamaki (2010), defined a Key Account Relational Development Model which describes how KAM relationships can develop along a transactional-collaborative continuum of: pre-KAM, early KAM, mid-KAM, Partnership KAM, synergistic KAM (Appendix 7). Drawing on my KAMger experience, I recognised the complexity of the problem and transformative nature of the solution would require highly collaborative and maturing relationships to be built. I proactively facilitated the transition from Pre-KAM and Early-KAM, through to Partnership-KAM and Synergistic-KAM, where the working relationship is so close it may be hard to differentiate between the teams of the supplier and client, as an entity formed with the focus of creating joint value (Millman and Wilson, 1995). Leading this maturing transition required me to continually Reflect on the nature and maturity of relationships between and within the delivery team, but also with key stakeholders. Through Reframing, I identified when a shift was appropriate and through Redesign, facilitated the path of transition between one level to the next. We progressed from Early to Mid-KAM at the start of the PoC to Synergystic-KAM.

My experience of KAM taught me the importance of understanding, defining, refining and proposing performance measures which align with the problem to be solved. In addition it is essential to measure and state value and RoI. Woodburn and McDonald (2011, p.328) suggest there will be metrics which are relevant to decision making relating to the problem

being solved at the levels of strategy, its realisation and operations. I used this model to ensure the value proposition was expressed in such a way as to deliver to each level of the metrics, so that key stakeholders would support the proposed plan at every stage.

Kim and Kankanhalli (2009) recognise status-quo bias impedes the implementation and use of a new technology. Limayem et al., (2007) cited in Schirrmacher et al. (2019, p.3), suggest it is necessary for a "close investigation of the social and cultural context, as well as changes and patterns in the users' environment over an extended period of time". Previously my client experienced challenges with user-adoption of several major systems resulting in the RoI falling short of planned levels. It was therefore essential to find and trial ways of de-risking, quickening and improving user-adoption, as it is through best use that the technology delivers optimum value. Limayen et al (2001) recognise the need for intervention which disrupts users' existing habits, freeing-up space for new ones ***(EE5)***. Thaler and Sunstein (2008 p.6), suggest that Nudge Theory "alters people's behavior in a predictable way without forbidding any options or significantly changing their economic incentives". As KAMger, I was keen to ensure excellent user-adoption, as this was a key element of delivering high levels of value. I therefore proposed and gained support for the inclusion and evaluation of Nudge Theory, within the PoC. Nudges were developed by understanding and Reflecting on business processes, existing behaviours, users' feedback, pain points and requirements. Using this insight, it was possible to Reframe and identify the refinements to process, functionality and behaviours which directly influenced increases in efficiency and productivity. Redesign took place, as nudges were developed, trialled and refined and training delivered. Use and adoption, as well as efficiencies and productivity improvements were measured to demonstrate the benefits and the contribution to RoI ***(EE5)***.

The Value Management Report (VM) was a key deliverable of the PoC delivery. The Australian and New Zealand Standard (1994) defined VM in construction as "a structured and analytical process which seeks to achieve value for money by providing all the necessary functions at the lowest total cost consistent with the required levels of quality and performance". DeSanctis and Gallupe (1987), cited by Olawumi et al 2016, p.54) identified the importance of a Group Decision Support System (GDSS) to assist VM, which draws together communication, computer and decision technology. The capabilities of the solution I implemented were leading-edge transforming data from a siloed environment into a Common Data Environment and digital twin, providing a single source of truth, enabling improved operations and powerful data-driven dynamic decision-making, enhanced by AI. VM was used to define and demonstrate the high value and financial RoI created based on the cost of the Feasibility Study and PoC. One of the recommendations was that the Key Performance Indicators (KPI) proposed in the VM model are used to measure and manage performance, ensuring benefits are realised. A strategy, scope for the next phase, full VM justification and resource and delivery proposal was presented to the Steering Committee and decision makers ***(EE6)***.

The impact and the influence I exerted, is recognised as having been significant **(EE7)**.

**Learning Outcome 3: Handing-over to the business and Managing-Self.**

At the end of the Feasibility Study, I was asked to hand-over leadership of the project to a new sponsor and senior JV employees who represented engineering, technical assurance,

innovation and commercial functions who would lead the next phase of the platform's development and funding application. I prepared and delivered a handover plan.

I was disappointed that it happened at this stage, as I wanted to complete the sale and define and deliver the next phase which would be critical to the continued development and sustainability of the platform. I was concerned, the new owners may not approach the next steps of the complex sale through the lens and actions of a KAMger, and that the sale would not be successfully made to the decision-makers and necessary support and resources not obtained.

I Reflected on my emotions which were a combination of: frustration that the business representatives decided to exclude me and the Consultants from the decision-making; grief over the loss of the ownership and involvement in the project; loss of the pioneering adventure and work I had so enjoyed; concern over the future of the technology should the sale not be made and the next tranche of investment agreed, as well as fear over how my tenure as a consultant to my client may be impacted.

The role of a KAMger is personally demanding as they are frequently pulled in many directions as they create, gain support for, and work towards the implementation of their vision. They must also align the suppliers to work collaboratively to identify, implement and create the necessary value for their client and secure funds and resources for the development and continuation of the initiative, as appropriate. Often neither the KAMgers' employer or client recognise the sacrifice, commitment, knowledge and skill levels required to achieve this and are often oblivious to the demands being placed on the KAMger.

Throughout, it has been necessary for me to draw upon previous experiences and prior-learning to ensure my continued well-being through continually Reflecting, Reframing and Redesigning my thinking and behaviours. Due to Government decisions relating to cancellation of sections of the overall railway, and pressure to reduce costs, after 4 years, my contract ended in December 2023.

I used several tools to maintain my well-being, these are briefly described below.

Using Kegan's Constructive - Development Theory in Adults (Kegan 1982, 1994, cited in Berger, 2003, 2007, p1) I have operated between the Fourth Order; the Self-authored Mind and Fifth Order; the Self-transforming Mind (Berger, 2003, 2007, p. 7-9). "I am redefining meaning for me, as I am becoming increasingly willing to live with the uncertainty of life, limitations of myself, unfair circumstances and behaviours of others" (Ormston, 2023, p.5). This has strengthened me, as confidence has grown in my abilities to create value despite my circumstances. My values are more solid and central, and aligned with my personality and needs, as I continually Reflect, and where necessary, Reframe my thinking and mind-order and Redesign my thinking and behaviours to become increasingly adaptable, more wholehearted, and deliberate (Ormston, 2023, p5). This has increased my effectiveness and helped me, as KAMger, to deliver high-value throughout the sale and delivery. It has also helped me to deal with the disappointments and frustrations arising from no longer leading or being involved in the sale or delivery, as I have Reframed, using the Self-Transforming Mind, to face the uncertainty, my fears and frustrations.

Schwartz (2001, cited by Holmes, 2007), proposed the Internal Family Systems (IFS) model which suggested how one can work with sub-personalities or ego states. Holmes (2007, p.1) describes this as “Parts Work” and refers to “the experience of having shifting states of mind that have unique sets of thoughts, feelings and behaviours” and when they recur, are described as “different parts of our selves”. The aim of Parts Work is to understand the various personalities and sub-personalities which are often split and as a result, determine entirely different personalities in a person at different times. Using Witherspoon’s (2014, p.263), 3C model, I have Reflected on how I orchestrated or adapted my various Parts as and when they were needed during this engagement. Generally I was aligned, centred and balanced, but at times sub-personalities came to the fore. I identified Pioneering, Multi-tasking, Delegating and Exhausted Parts, as the project was intense, demanding long hours. When Reframing, I examined my Self which sits at a level above the Parts and identified Hard-Working and Over-active Parts which had contributed to the exhaustion, as well as an inner slave-driver which pushed me to do things even when very tired and in need of a break. Also my Inner-critic occasionally put me on guard and created momentum. Dominant was my Servant Leadership Part (Jaramillo et al, 2009, p.260) and this enabled me to lead, enable and support the project team and satisfy stakeholder requirements. My Inner Critic, Morally Judgemental, Threatened and Fearful parts were all over-active during my transition from leadership of the sales and delivery to handover. The good news is that through use of the various tools I have referred to in this submission my Adventurous, Rationale and Confident parts are highly active and I am feeling positive in my abilities and future opportunities.

Boxall and Macky (2014, P.1) suggest that “Higher involvement is a key factor predicting higher job satisfaction and better work–life balance while it has no relationship to stress or fatigue. In contrast, higher levels of work intensity increase fatigue and stress and undermine work–life balance.” In past KAMger roles, and certainly during this one, whilst it has been highly stimulating and satisfying due to its intensity, it has resulted in poor balance and personal sacrifice. This initiative left me with insufficient time and energy to devote to the preparation of this submission, relationships and other important aspects of life. It has been a trade-off between fun, satisfaction, progress, and personal sacrifice and fatigue. At times, I fought hard to maintain balance.

## 7) Summary

My experiences during this assignment are not unusual for KAMgers, hence the proposed focus of my doctoral research. Hengstebeck et al (2022, pp.401), suggests under-researched KAM topics include those relating to attitudes, personality traits, capabilities and execution and outcomes.

“My aim for this research is to understand and measure the value to individual KAMgers, of toolsets, frameworks and methods, which can be used to deliberately self-monitor, self-construct and self-build for higher, more aligned, consistent, sustainable and fulfilled performance in their roles and personal lives” (Ormston, 2023 p.10).

My experience of leading KAMgers is that most do not appreciate the need for and do not possess or apply these competencies, therefore there is a generic need. Bilal and Fatima

(2020) suggest that following training, through deliberate practice and reliance on the inner-coach to self-monitor and regulate, the speed of and impact of training effectiveness can be increased.

# 8) Evidence of Prior Learning

## Introduction

The background information and evidence provided in this section is in redacted form. Although I prepared or jointly prepared all information, it remains the property of my Client and my Client's Client, and therefore all sensitive and confidential information has been removed prior to its inclusion. Seven Evidence Exhibits ***(EEs)*** with supporting commentary are provided below:

## *EE1:* Construction Project

The following images and annotations provide examples of the type of Construction work IOP is impacting.

### A43 west bound diversion.



**South of A422 and commenced piling for Westbury Viaduct**



**At Westbury Viaduct, the installation of girders and diaphragms.**



**At Westbury Viaducts North Piers 7 to Pier 3, installation continues at a good pace.**



**Eiffage Metal continues with first launching girders installation at Westbury Viaduct.**



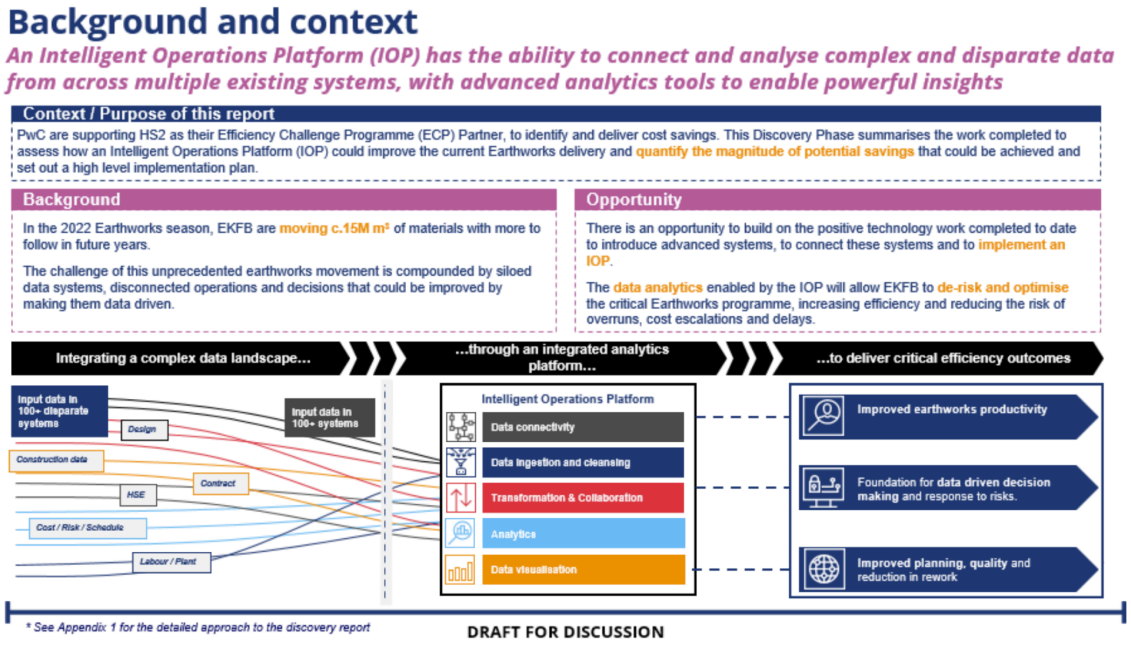
**Chipping Warden Green Tunnel**



## *EE2:* Introducing the Concept

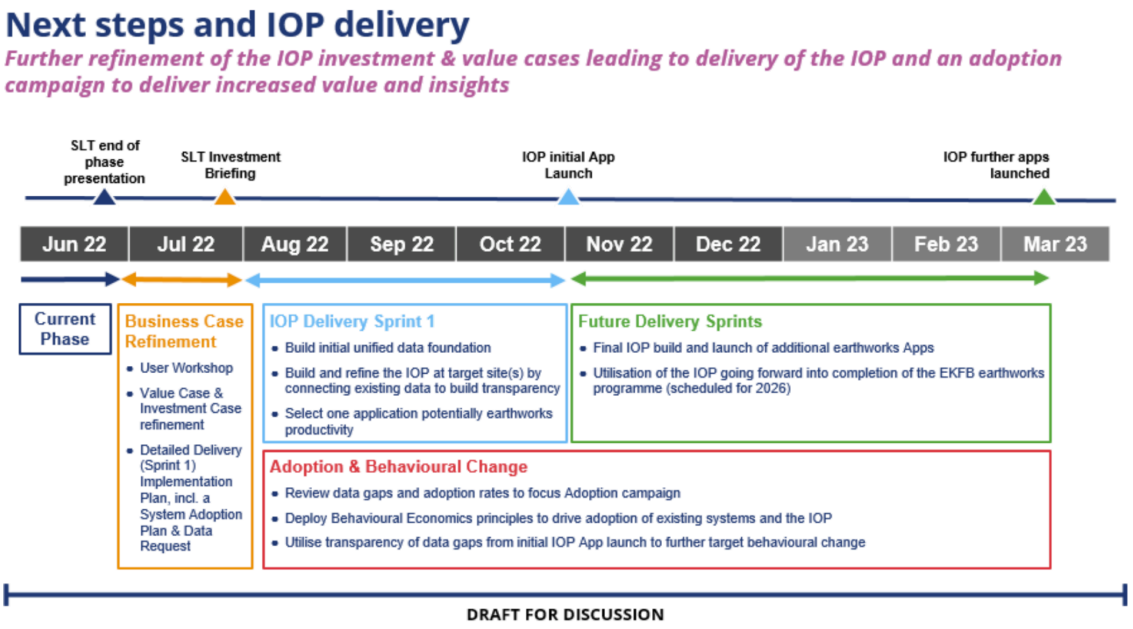
I started work to define and shape the IOP concept in February 2022 and began engagement with stakeholders in April 2022.

Due to the scale and complexity of the Client's organisation, many stakeholders needed to be informed and I considered it essential that all stakeholders at the SLT levels were briefed. This ensured the concept was understood, and provided the opportunity for them to express opinions, challenge and ask questions. This was important, as the proposal was to drive transformation and deliver significant value from business activities which were problematic, challenging, and core elements on which overall programme delivery was dependent.

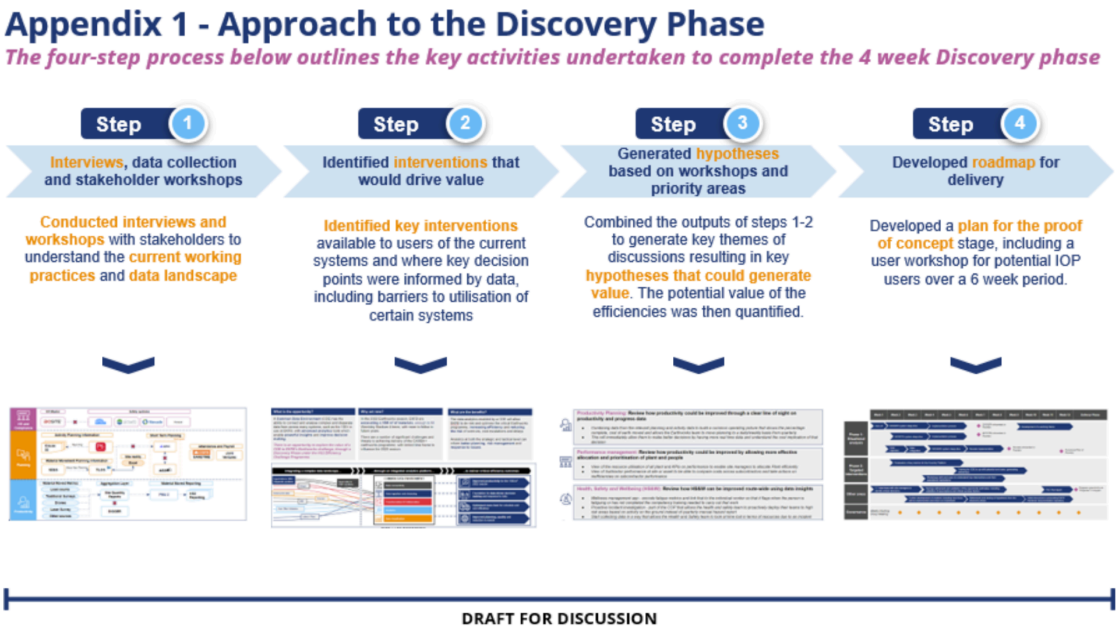



In May 2022, I proposed to the Senior Leadership Team (SLT) a month of Discovery work during June 2022, to assess the feasibility of applying the technology to a specific aspect of the Programme and to provide an estimate of the benefits and associated value. Support was gained for further work in July 2022 to focus on a more detailed assessment of the business case, and assuming this was sufficiently robust, for a three month PoC to be

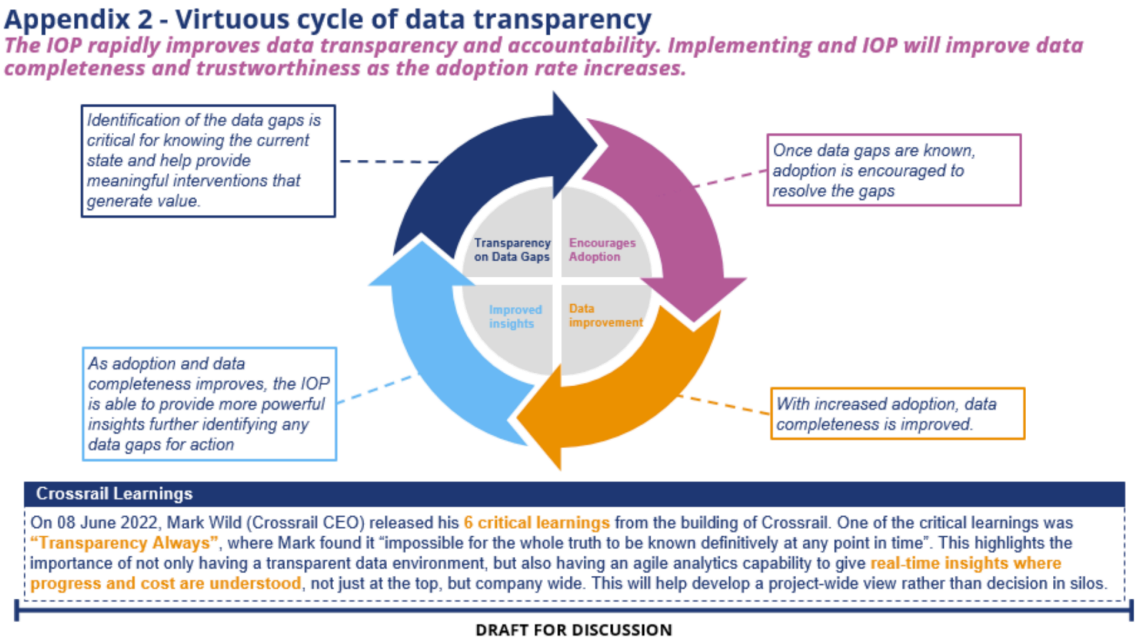
undertaken between August-October 22, followed by future delivery sprints.




The approach to Discovery followed a classic consulting approach involving four steps: Interviews and data collection to understand the landscape and specific needs and challenges; identification of Interventions which would drive value; Hypothesis based on workshops and priority areas and a Delivery Roadmap.




I recognised that data quality was critical to success, and it would be necessary to drive a virtuous circle of data transparency to increase clarity and confidence in the IOP solution.




## *EE 3:* Project Kick-off

Despite the Discovery and Business Case Refinement stages being completed on time, a decision to proceed was not made, as changes to the senior leadership impacted the project's sponsorship and prevented an investment decision.

It was not until late February 2023 that a decision to proceed was reached. I approached the newly appointed Efficiency Director and asked him to Sponsor the project, as I believed it would contribute to his brief. Initially, skeptical, he agreed to provide Sponsorship and using information from the Discovery and Business Case work we were able to secure funding and an agreed scope and focus area for the project. The brief was relatively loose, with £multi-million financial savings required in the form of efficiency and productivity savings, significantly improved data transparency and shortened timescales. It was summed up by the Efficiency Director as "you need to "wow" us."

The project kicked-off on 8th March 2023 with key stakeholders present. The following slides are extracts from the launch presentation which I led covering, challenges, desired outcomes and aims. The following three images summarise the challenges, targeted business outcomes of data and process transparency and targeted intervention to achieve this. North Stars defined the tangible goals of delivering a common operating picture and building of applications for intervention and use by key teams.

## Summary of current challenges in design and consents and the objectives for Sprint 1 of the Intelligent Operations Platform (IOP)

**Current Challenges:** a lack of transparency of the **status of design and consents** is making it challenging to prioritise planning effectively and maintain **construction productivity**, the **time taken** to progress designs puts the overall programme at risk, and the process is leading to **high levels of qualifications and technical debt**.

**The IOP will help address our delivery challenge:** it will provide transparency of the status of design and consents at asset level, the specific pain points in terms of design and consents progression and build targeted applications that can identify management interventions for improvement.

**Successful IOP implementation:** work together to provide access to data, insight and feedback on the current process and work together to implement the applications for improvement.



DRAFT FOR DISCUSSION

## Key business outcomes of the the IOP

***The scope reflects the insights gained from the previous workshops to determine the business outcomes***

**Provide data and process transparency:**

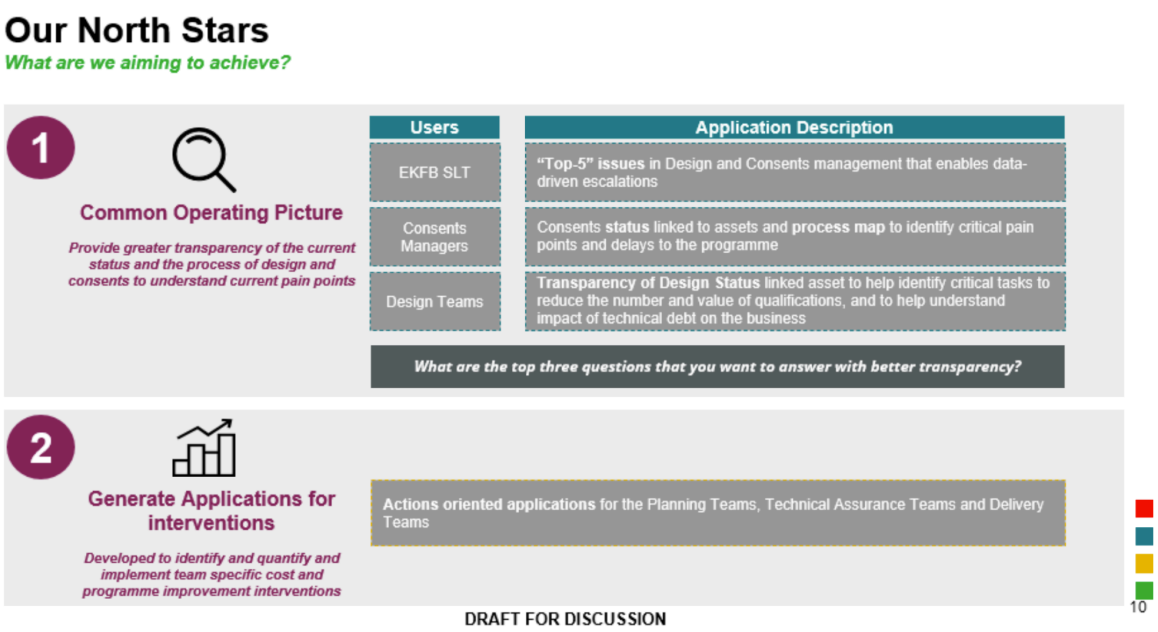
- Provide greater transparency of the current **status** and the **process** of design and consents to **understand current pain points**.
- Improve **prioritisation and sequencing** of work minimising disruption and provide greater understanding of the impact of delays on the programme.
- Provide improved ability to **quantify the cost** incurred due to lack of data and process transparency.

**Develop targeted interventions:**

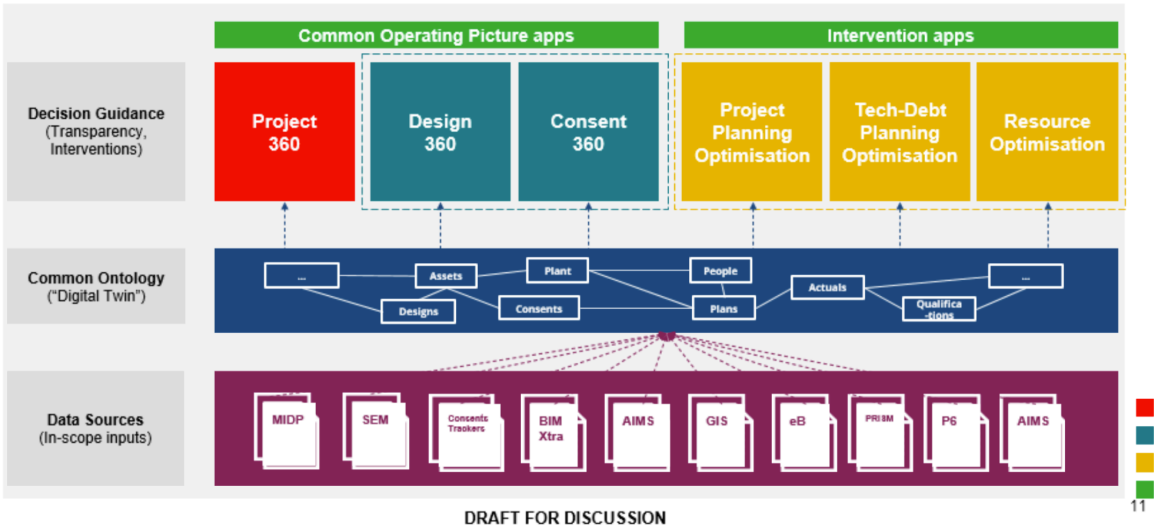
- Improved data analytics enabled by the IOP will allow **targeted interventions** to improve productivity with clear mechanisms to **quantify the benefit of improvements.**
- Quantification of the benefits will allow **continuous improvement** in operations to drive cost and programme efficiencies - this will allow the business to **measure progress** against the current pain points.



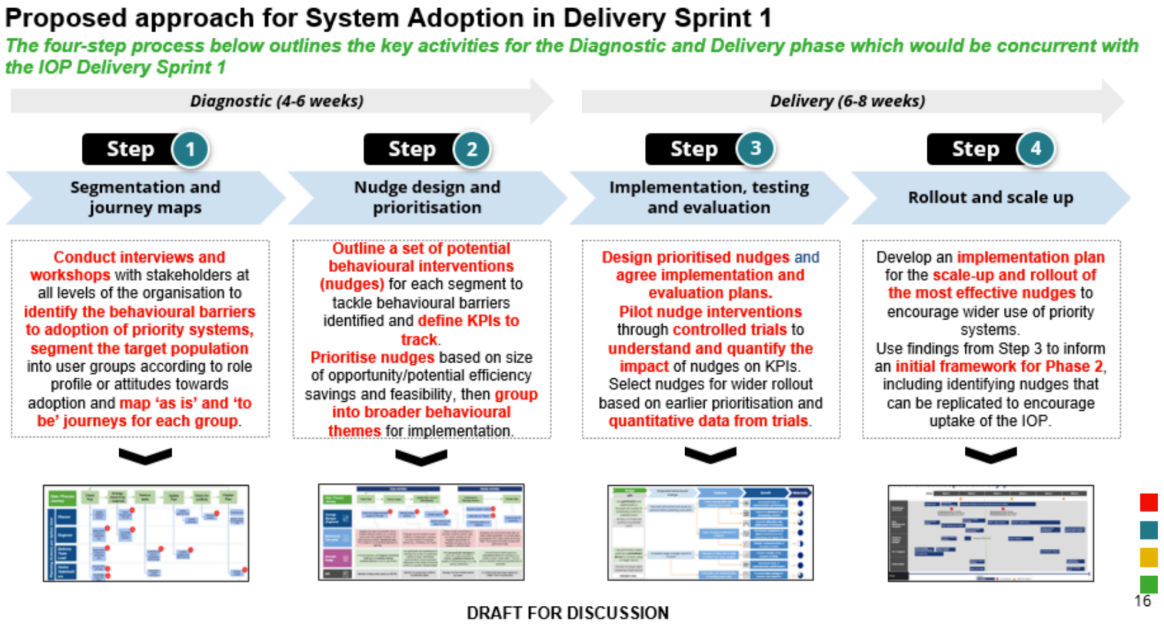
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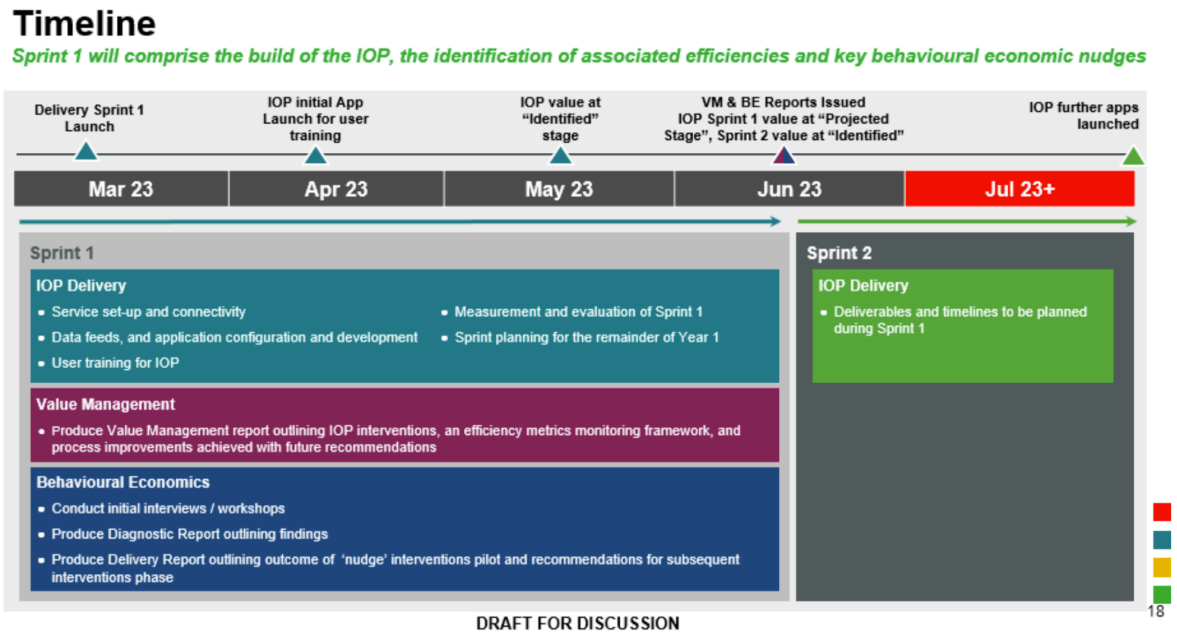

The plan was for an IOP to be built using existing multiple, fragmented and siloed data sources to create an Ontology (or Digital Twin) and common operating picture (Common Data Environment) which would produce insights on which operational processes and working practice improvements would be made through the use of rapidly developed operational tools or Apps.  Value would be created through reducing disruption and delay on the construction programme, cutting the time and cost of technical assurance and levels of technical debt.



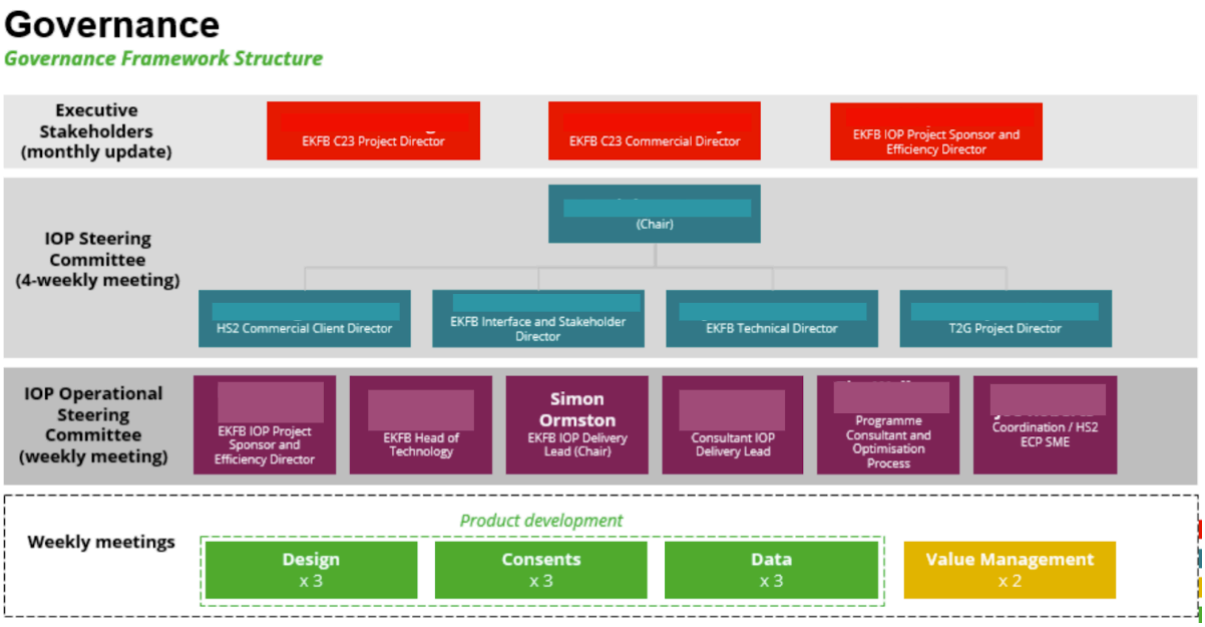
Nudge Theory and one to one coaching was used to drive IOP adoption. Nudges were defined by basing these on the insight gained from segmentation of users, understanding current and future desired journeys for each segment, identifying potential nudges for evaluation, implementing and testing the nudges and rolling-out those which are proven to be most effective with plans to scale up the use and adoption.



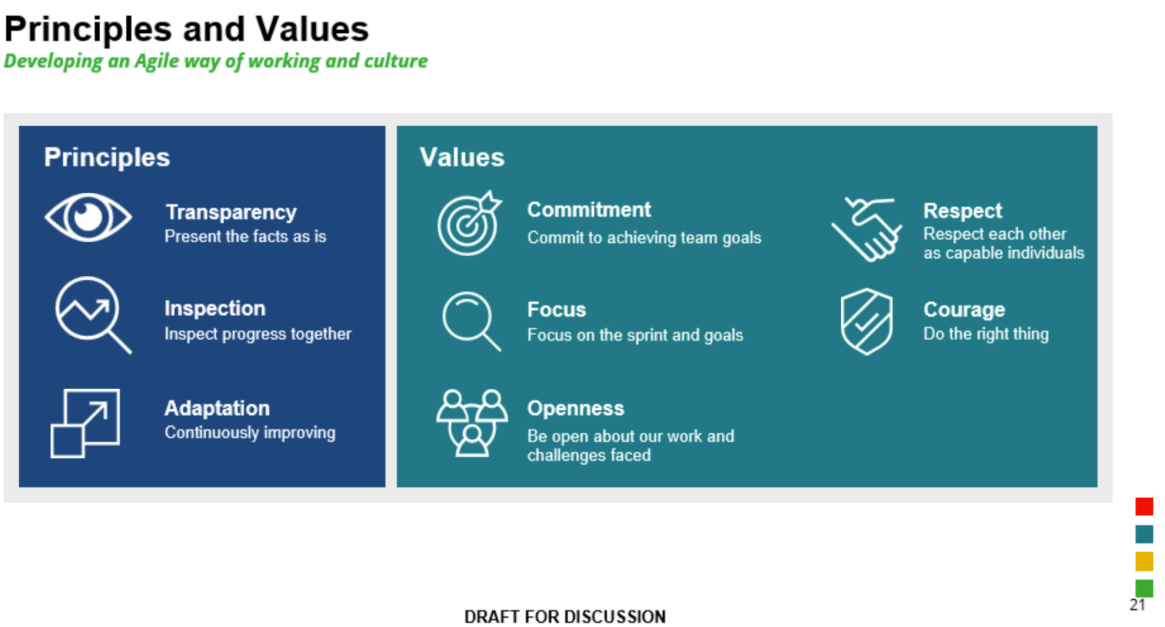

The initial three month delivery Sprint consisted of three workstreams: IOP Delivery, Value Management which provided the rationale, business case and Return on Investment (ROI) and Behavioural Economics which included Nudge Theory and was primarily concerned with system adoption and use, as without these, the required ROI and time savings could not be achieved.



Formal Governance of the project was via a 4-weekly Board Level Steering Committee involving Directors from my Client and Client's client. Operational decision making was undertaken by a Weekly Steering Committee made up of the Project Sponsor, me as overall Delivery Lead, heads of the technology and the business areas, and the Consultants.




I defined Principles and Values and the team frequently measured performance against these, but also referred to them when making difficult decisions. Progress was reviewed at Steering Committees to ensure the project, principles and values were aligned. At every meeting there was sharp focus on delivery progress and value created.



## *EE4:* IOP Capabilities

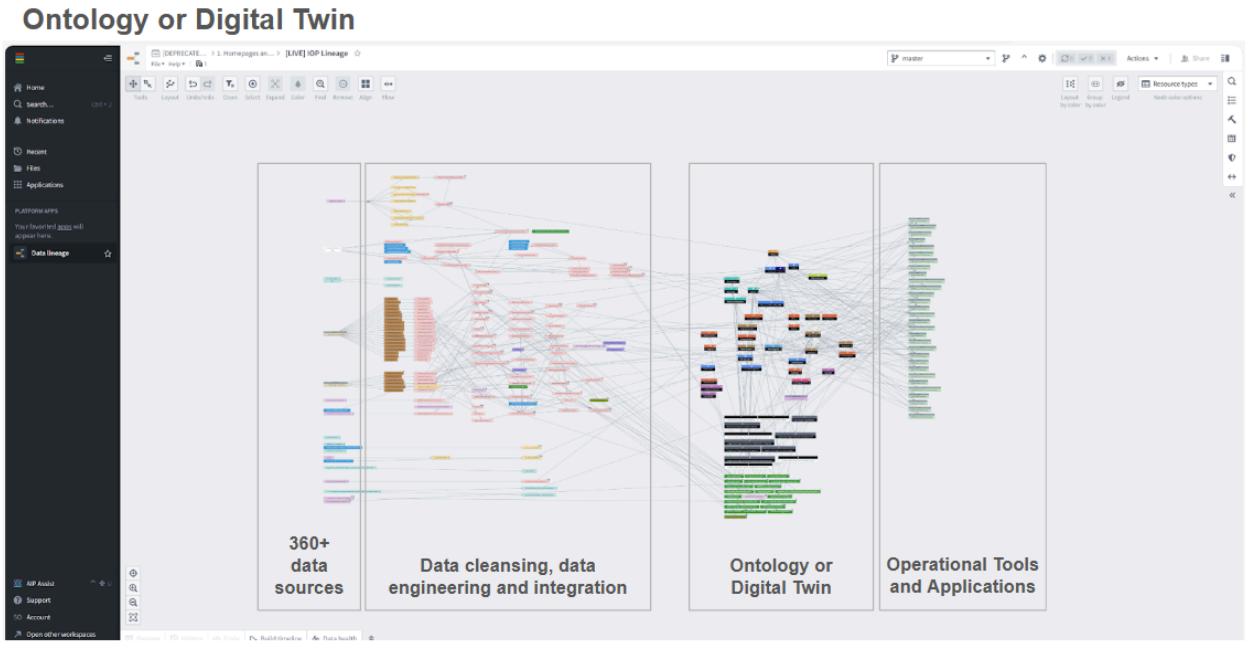
The focus of the IOP was on Design and Consents Management.

Design management involves the creation of agreed and fully technically assured designs for all infrastructure and construction Consents involves gaining the official agreement to the design by the many consenting bodies, which include County Councils, District and Town Councils, Utilities, Environmental Agency and Network Rail, to name but a few.  Both Design and Consents are critical processes and extremely difficult to manage due to the technical complexity and broad range of stakeholders and official parties involved.

### Ontology and Digital Twin

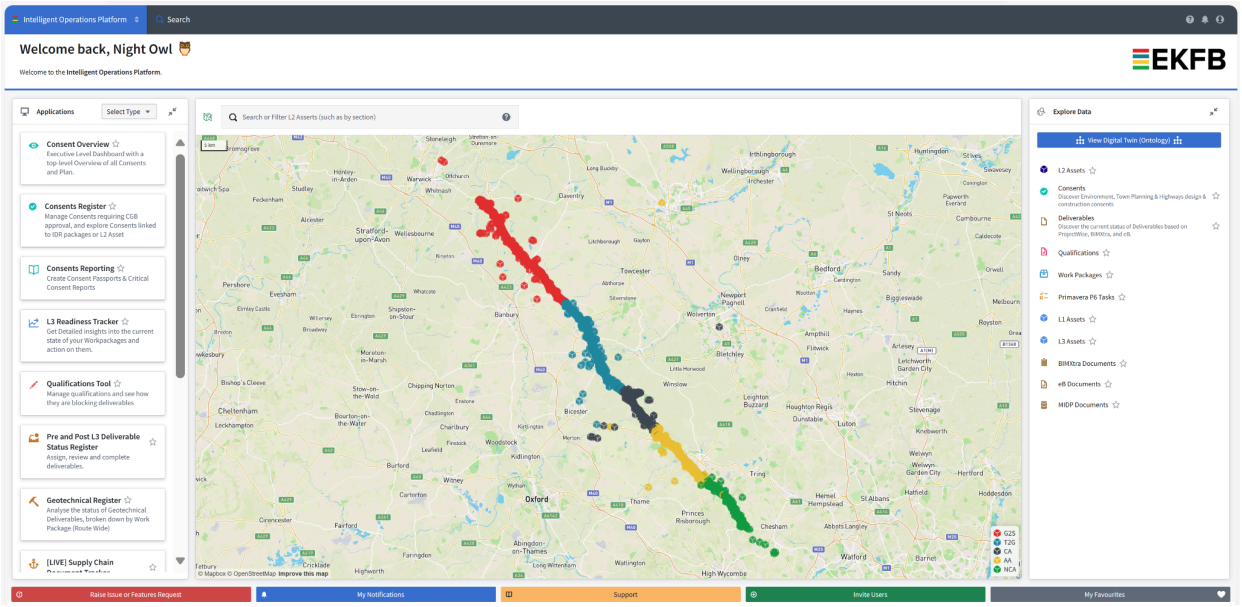
The diagram of the Ontology or Digital Twin shows how the ingested data of which there were 360+ independent sources, was cleaned, engineered and integrated to produce and feed the Digital Twin.  This is a virtual environment, or digital expression or model, that accurately reflects physical objects, in this case, the tangible components required to support infrastructure asset designs.  The newly developed Operational Tools and Applications transformed existing processes and leveraged the high-quality data and transparency provided by the Single Source of Truth and Digital Twin significantly improving process capability, speed of operations and the quality of management decision making.

The image below shows a high level view of the data environment and Digital Twin of the complex process in scope.  As this is confidential to my client, the text detail of the image has been kept deliberately small so it cannot be read.




Operational tools and applications were presented on an interactive home screen enabling data to be interacted with quickly and easily.  Support services and reference documentation

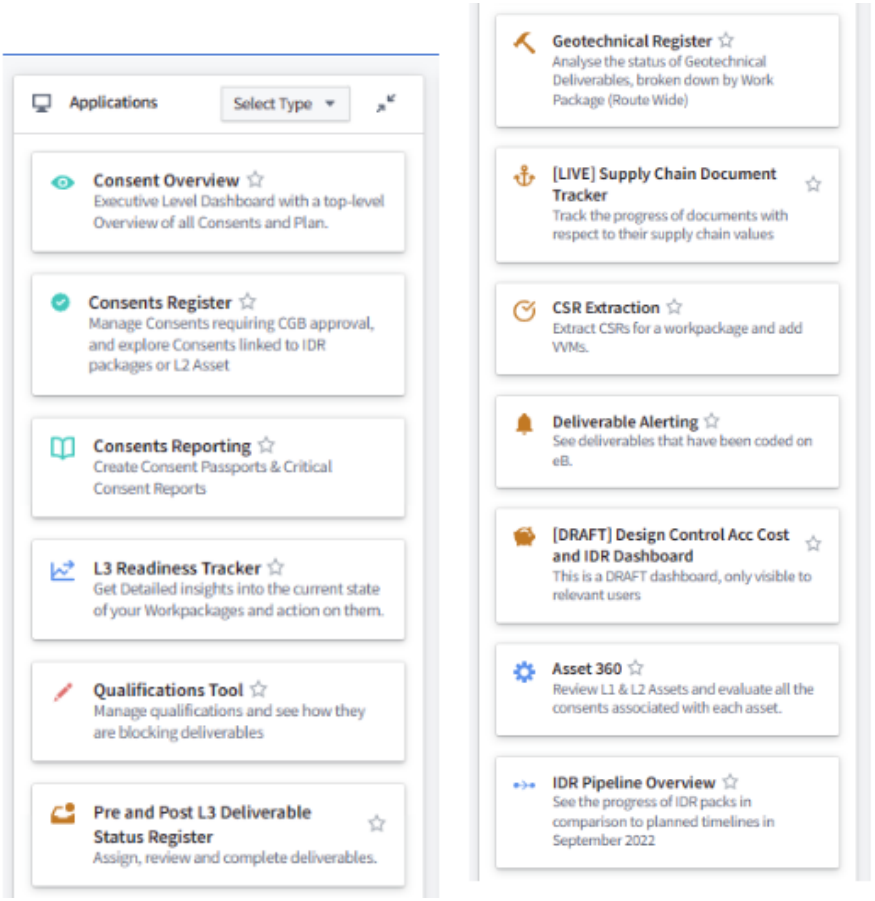
are all available on this screen.




The broad range of applications provide Design and Consents managers and decision makers with rapid access to complete, high-quality, near-real time information based on a single source of truth.  This provides the ability to update information in real-time where appropriate and for critical and financially impactful decisions to be made confidently.

**IOP Applications**

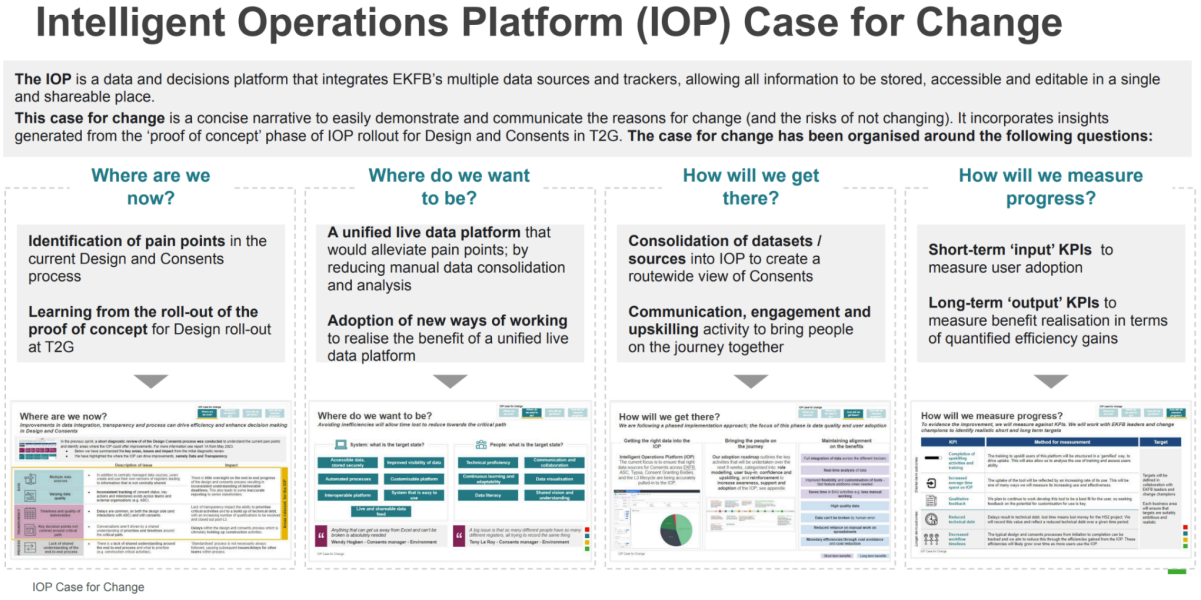
The applications shown below were co-created with users and nudge theory was used to achieve high levels of user adoption.  The IOP and applications have completely replaced existing ways of working for Design and Consents Management.  Design was the main focus of the work during the period March - June 2023 and from July - October 2023, the focus was Consents.


Applications
Select Type
Consent Overview
Executive Level Dashboard with a top-level Overview of all Consents and Plan.
Consents Register
Manage Consents requiring CGB approval, and explore Consents linked to IDR packages or L2 Asset
Consents Reporting
Create Consent Passports & Critical Consent Reports
L3 Readiness Tracker
Get Detailed insights into the current state of your Workpackages and action on them.
Qualifications Tool
Manage qualifications and see how they are blocking deliverables
Pre and Post L3 Deliverable Status Register
Assign, review and complete deliverables.
Geotechnical Register
Analyse the status of Geotechnical Deliverables, broken down by Work Package (Route Wide)
[LIVE] Supply Chain Document Tracker
Track the progress of documents with respect to their supply chain values
CSR Extraction
Extract CSRs for a workpackage and add VVMs.
Deliverable Alerting
See deliverables that have been coded on eB.
[DRAFT] Design Control Acc Cost and IDR Dashboard
This is a DRAFT dashboard, only visible to relevant users
Asset 360
Review L1 & L2 Assets and evaluate all the consents associated with each asset.
IDR Pipeline Overview
See the progress of IDR packs in comparison to planned timelines in September 2022

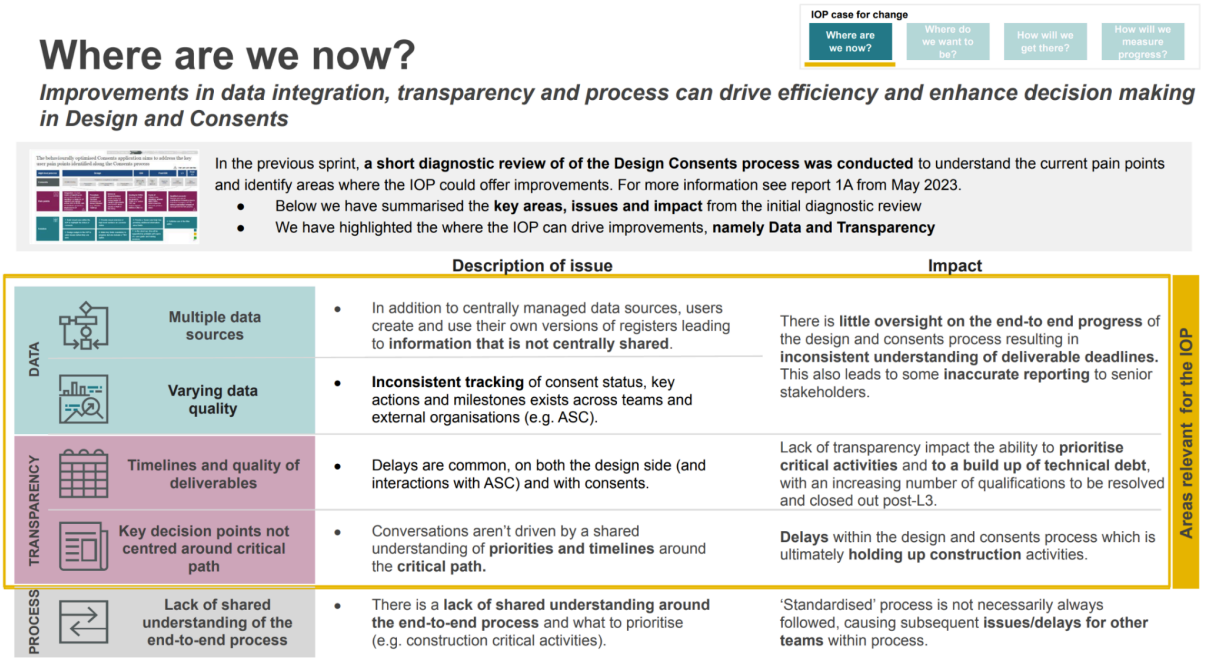
## EE5: User Adoption, Training and Nudges

### The Case for Change - IOP for Consents

To ensure a strong case for the change to Consents Data and Operational processes and to help with stakeholder communications, the following five images describe the Case for Change. I used this with many stakeholders as a storyboard to inform and gain buy-in. It proved to be powerful, as its message is deliberately clear as to why a move from the current state to the future desired state was needed and beneficial. It confirmed that the process of change was to be collaborative and focused on delivering benefits to the business and all who were working to efficiently manage the thousands of consent requests.




IOP Case for Change



IOP case for change

Where are we now? | **Where do we want to be?** | How will we get there? | How will we measure progress?

# Where do we want to be?

***We aim to reduce inefficiencies through both cost avoidance and cost reduction***

## System: what is the target state?

- Accessible data, stored securely
- Improved visibility of data
- Automated processes
- Customisable platform
- Interoperable platform
- System that is easy to use
- Live and shareable data feed

## People: what is the target state?

- Technical proficiency
- Communication and collaboration
- Continuous learning and adaptability
- Data visualisation
- Data literacy
- Shared vision and understanding

> *Anything that can get us away from Excel and can't be broken is absolutely needed*
>
> **Wendy Hogben - Consents manager - Environment**

> *A big issue is that so many different people have so many different registers, all trying to record the same thing*
>
> **Tony Le Roy - Consents manager - Environment**



IOP case for change

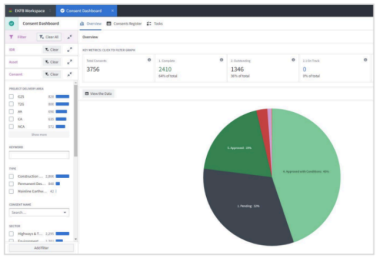
Where are we now? | Where do we want to be? | **How will we get there?** | How will we measure progress?

# How will we get there?

***We are following a phased implementation approach; the focus of this phase is data quality and user adoption***

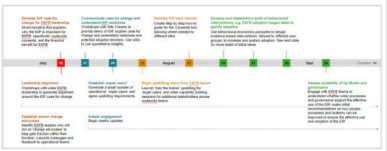
## Getting the right data into the IOP

**Intelligent Operations Platform (IOP)**
The current focus is to ensure that right data sources for Consents across EKFB, ASC, Typsa, Consent Granting Bodies, and the L3 lifecycle are being accurately pulled-in to the IOP.



## Bringing the people on the journey

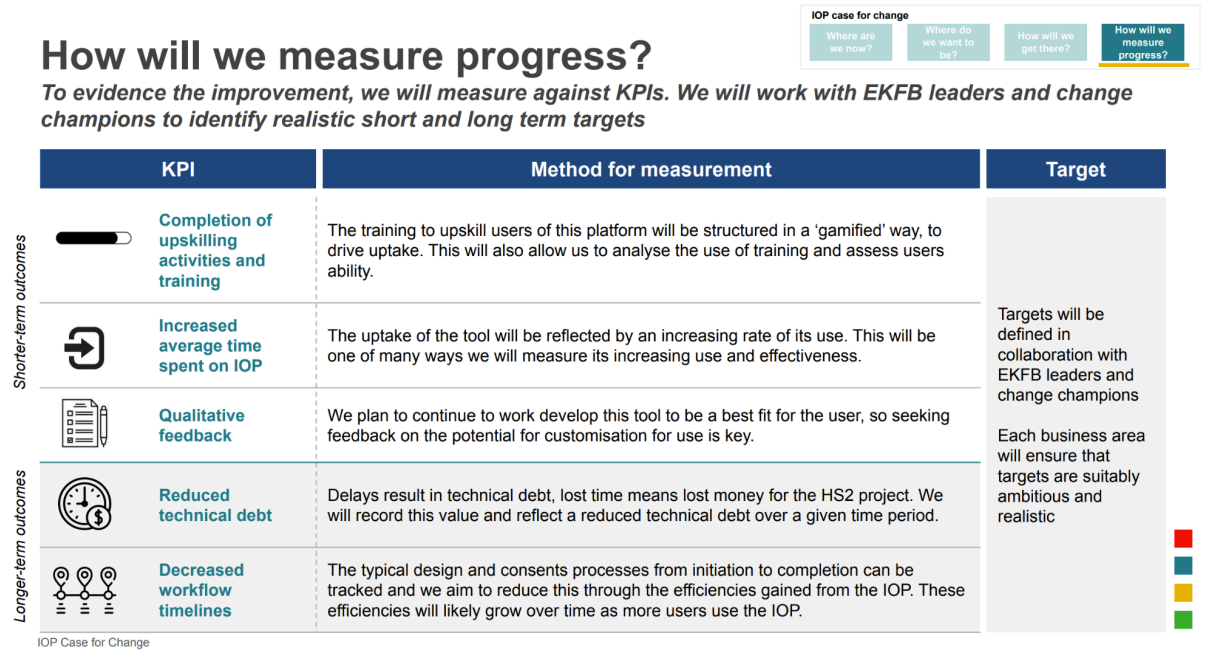
**Our adoption roadmap** outlines the key activities that will be undertaken over the next 9 weeks, categorised into: **role modelling**, **user buy-in**, **confidence and upskilling**, and **reinforcement** to **increase awareness, support and adoption** of the IOP; see appendix



## Maintaining alignment on the benefits

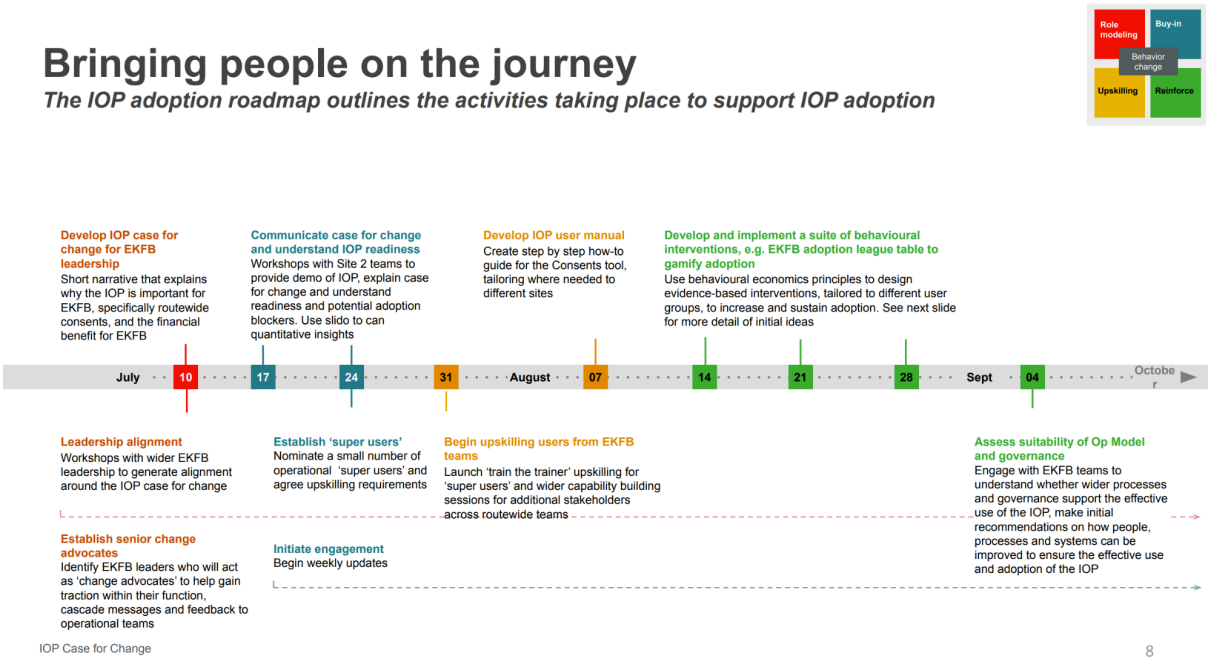
- Full **integration of data** across the different trackers
- **Real-time analysis** of data
- Improved **flexibility** and **customisation of tools** - fast feature additions when needed
- **Saves time** in BAU activities e.g. **less manual working**
- **High quality data**
- **Data can't be broken** by human error
- **Reduced reliance on manual work on spreadsheets**
- **Monetary efficiencies through cost avoidance** and **cost reduction**

Short term benefits | Long term benefits




## User-Adoption Roadmap

The Adoption Roadmap was developed to ensure the project team and stakeholders understood the key milestones for adoption and to measure progress.




## User Guides and Training

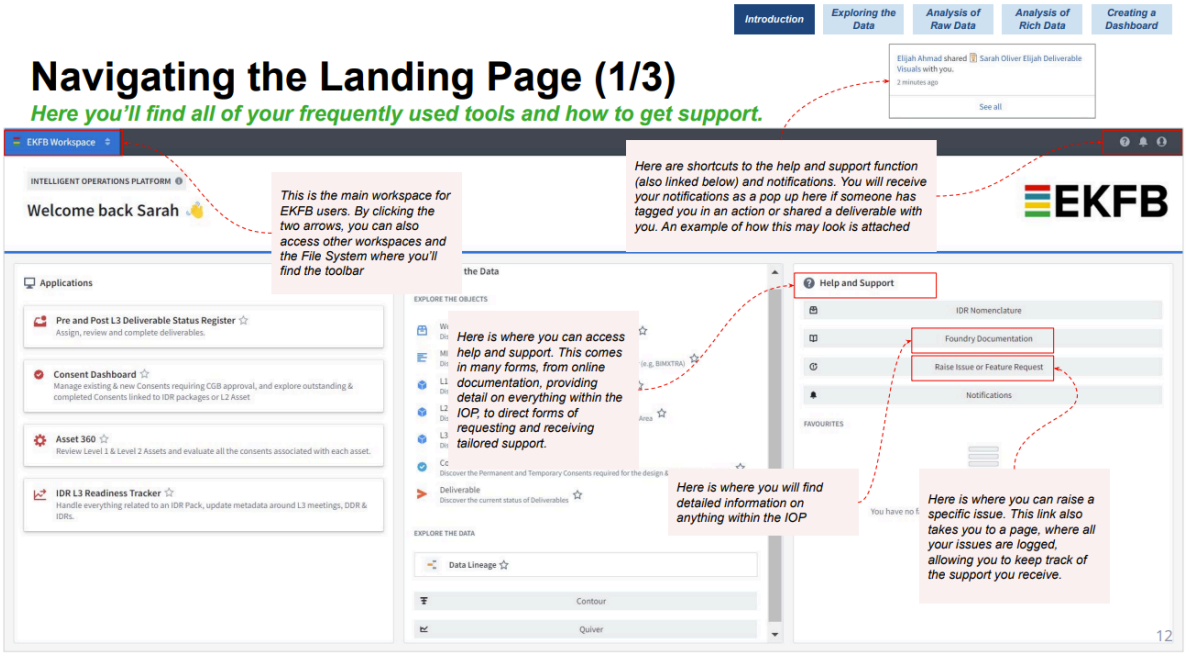
Detailed User Guides were prepared and used in group and one to one training and working sessions.  This was to ensure that value to end-users and the business was understood and users willingly adopted and capably used the tools.







An extract from a User Guide:




**Nudges**

A range of nudges were built into processes, working practices and the IOP, to help re-shape behaviour and working practices of end-users.  Examples are provided below:

***These techniques are aimed at reducing perceived frictions and optimising its use***

| # | BE Input | Primary audience/ End user |
|---|---|---|
| 1 | **Create a dashboard with progress bars for each discipline**, providing quick and visual oversight to leadership, allowing them to quickly identify which documents are falling behind and prompt discussions of (re)prioritisation. | Senior leadership |
| 2 | **Build visual cues within the IOP to highlight deliverables that are overdue, or require attention,** prompting discussions among management and action among operational users. | Senior leadership & Operational users |
| 3 | **Use percentages to add context to the 'high level overview' numbers** on the application's landing page. | Senior leadership & Operational users |
| 4 | **Create a dashboard for operational users that summarise key information needed for day-to-day tasks** e.g. IFC status and discipline. | Operational users |
| 5 | **Design nudges in the IOP to catch issues before they are sent.** For example, we will create pop-up alerts to notify users of the key fields to complete, and flag when fields have been left empty. | Operational users |
| 6 | **Provide a 'hover-over help' box** providing additional information about fields that users may be unfamiliar with . | Operational users |
| 7 | **Introduce friction to discourage users from exporting data into excel files.** While providing the option to export to excel in the short run is helpful to build trust, we will introduce some friction in the form of an alert to discourage users from doing this in the longer-term. | Operational users |

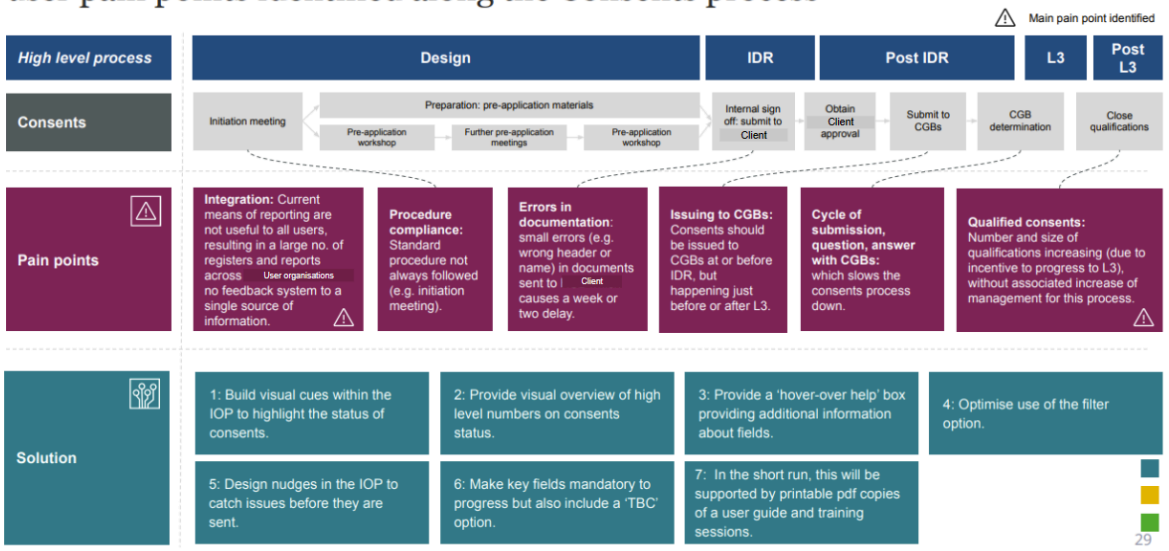
***These techniques are aimed at reducing perceived frictions and optimising its use***

| # | BE Input | Primary audience/ End user |
|---|---|---|
| 1 | **Build visual cues within the IOP to highlight the status of consents,** and in particular to draw attention to those that require attention. | Senior leadership & Operational users |
| 2 | **Provide visual overview of high level numbers on consents status,** and make the graph interactive so users can easily filter view different statuses at a glance. | Senior leadership & Operational users |
| 3 | **Provide a 'hover-over help' box** providing additional information about fields that users may be unfamiliar with. | Operational users |
| 4 | **Optimise use of the filter option, making the default option 'filter open'** but with the option to minimise it for a cleaner view of the data, **and functionality that mirrors MS excel** to add familiarity to the platform. | Operational users |
| 5 | **Design nudges in the IOP to catch issues before they are sent,** i.e. notify users of the key fields to complete, and flag when fields have been left empty. | Operational users |
| 6 | **Make key fields mandatory to progress,** however to not discourage users, include a 'TBC' option, which will allow them to progress, while triggering a reminder to complete the task. | Operational users |
| 7 | **In the short run, this will be supported by printable pdf copies of a user manual and training sessions.** | Operational users |

***These techniques are aimed at reducing perceived frictions and optimising its use***

| # | BE Input | Primary audience/ End user |
|---|---|---|
| 8 | **Make clear to users when the data was last updated to help build user trust** around the data they see, and the platform more generally. | Operational users |
| 9 | **Make the IOP's 'help' function visible to users on the homepage,** making it clear to users where they can seek immediate support in response to platform challenges. | Operational users |
| 10 | **In the short run, this will be supported by printable pdf copies of a user guide and training sessions.** | Operational users |

# The behaviourally optimised Consents application aims to address the key user pain points identified along the Consents process




# IOP user feedback

***What users are saying***

*"(The IOP) looks really good and is something that we desperately need and have needed for a long time"*
Consents Manager

*"Anything that can get us away from Excel and can't be broken is absolutely needed"*
Consents Manager

*"This will save me so much time I can't believe it!"*
Consents Lead

*"IOP is awesome and saves a lot of time!"*
Town Planning Lead

*"This is way better, way easier, than having to work between all our spreadsheets! I'm really excited about proving its potential"*
Consents Manager

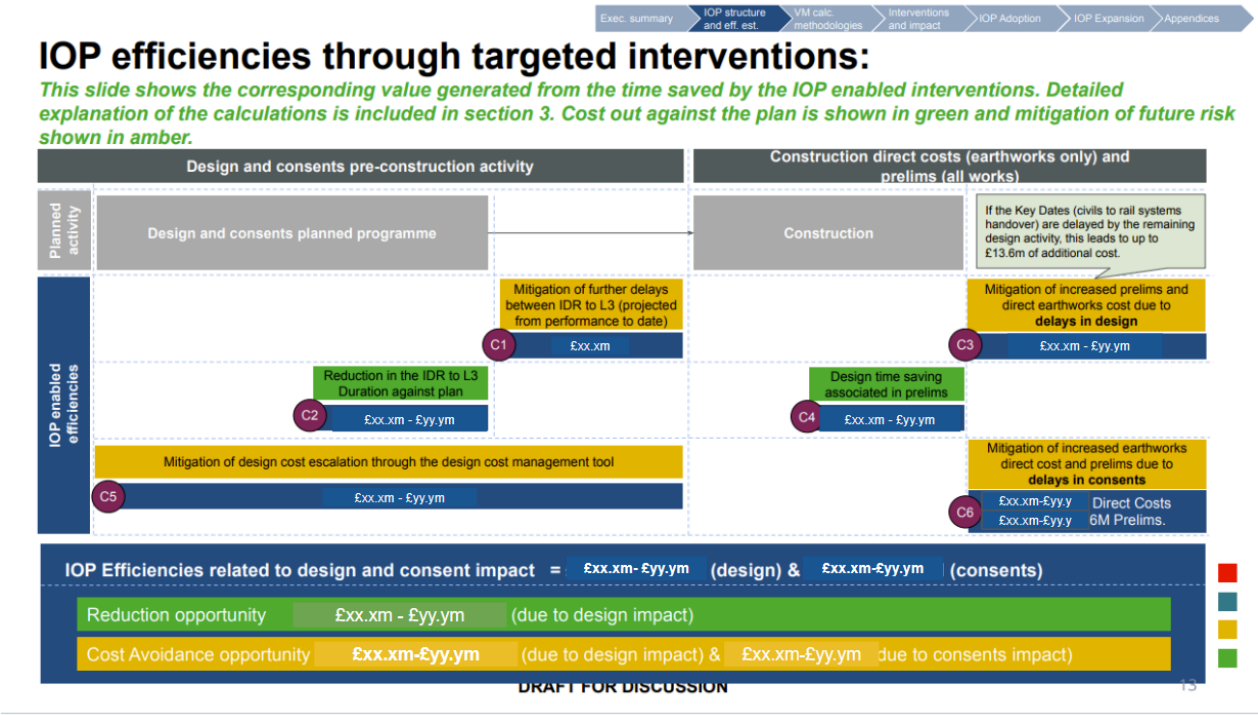
*"It's a total nightmare (in Excel) when dates are changed. So if we can truly do this - Brilliant!"*
Consents Lead

*"Anything that reduces the number of spreadsheets is good for me"*
Consents Manager

*"Quick availability of information, means quicker actions can be taken"*
Technical assurance

## *EE6: Value Management*

The following is a redacted summary of the 32-page Value Management Report:



## *EE7:* Open Letter from GPS Consulting Limited

The following is an open letter from my colleague, Gurpreet Sohal whose business GPS Consulting Limited holds the sub-contract with the end client. This provides the context for the work I have undertaken and hints at some of the challenges of delivering such an intense and complex project. My company Agileeto Limited contracts with GPS Consulting to provide my services to the end-client.

05/10/2023

To whom it may concern,

I confirm Simon Ormston has been operating on behalf of G.P.S Consulting Limited for Eiffage Kier Ferrovial BAM JV (EKFB), which is working for HS2.

Simon has been pioneering an innovative, high-profile initiative alongside Palantir and PwC, which has been agile, dynamic and intense, requiring a major investment of time and effort to deliver the impactful change and significant financial benefits required by the Client.

It has involved the leadership of a sizeable team of dynamic consultants and significant and time-consuming stakeholder management at all levels within the organisation. Simon has undertaken this in an effective and professional manner and has done this with the necessary commitment needed to deliver the required ambitious outcomes.

I confirm this work required a large investment of time and energy during the past 6 months and this intensity has continued during the past 3-4 months. In line with the professional he is, Simon has invested heavily in this initiative. This has been necessary to deliver the outcomes required by the Client and to prove the value to the business of the initiative and associated technology.

If you wish to have a conversation or require additional information, please let me know.

Kind Regards,



Gurpreet Sohal
Director
G.P.S Consulting Limited (working on behalf of EKFB for HS2).
gurpreet.sohal@ekfb.com
07776 225 805

# Appendices

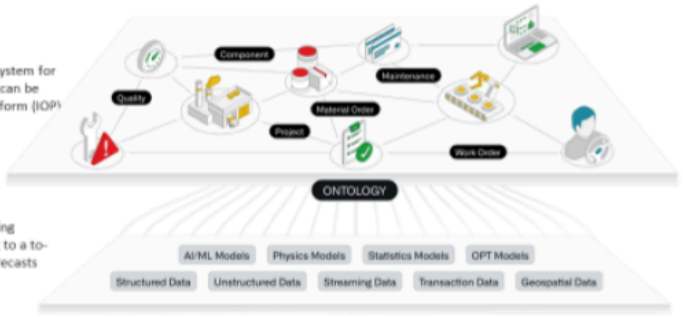
## Appendix 1

Appendix 1

Intelligent Operations Platform

### Overview of Platform

Platform for data-driven decision making and situational intelligence, it is as an operating system for enterprises, integrating data of a variety of types, creating operational tools in which work can be done, enhancing the value of the data asset more each day. The Intelligent Operations Platform (IOP) applies this to EKFB data.




### Operational forecasting and alerting in IOP

Forecasts built in Platform(in code or in point-and-click tools) can be integrated with alerting definitions to create warnings or tasks. Day to day interaction with these tasks (e.g. adding to a to-do list, completing the task or snoozing) can be used to make the alerting rules and the forecasts better over time.

### Current Ontology and extensions

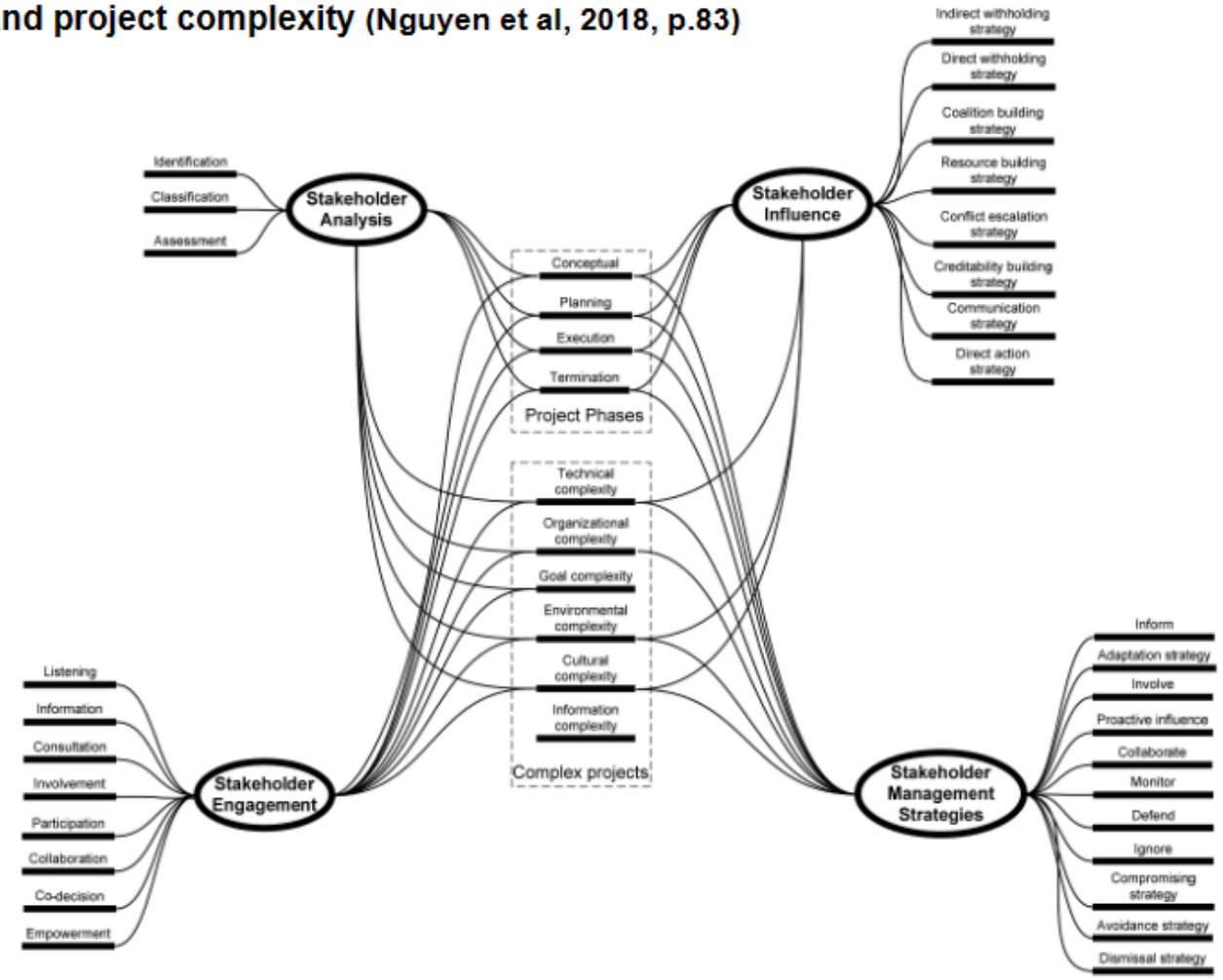
The data in use today covers the design and consents space (diagram right indicative), with live data flowing. Static imports of data extend that Ontology to include Causeway (cost) and TSP (time sheets), and live connections can be made once requested. Future extension of the Ontology should include contractual obligations, legal obligations, as well as data on construction/earthworks (pilling, earth volumes, concrete volumes etc)

**Relevant Foundry Features**

| | | | | | |
|---|---|---|---|---|---|
| Multiple data paradigms:<br>→ Transactional<br>→ Streaming | Data lineage traceability:<br>→ Where data comes from<br>→ Who changed this, when | Writeback to source systems | Easily accessible with data governance baked in | Advanced modelling capabilities:<br>→ Business logic, simulation or ML<br>→ Language models as models or tools | Rapid time to value:<br>→ Application builders make app dev quick for build and edit |

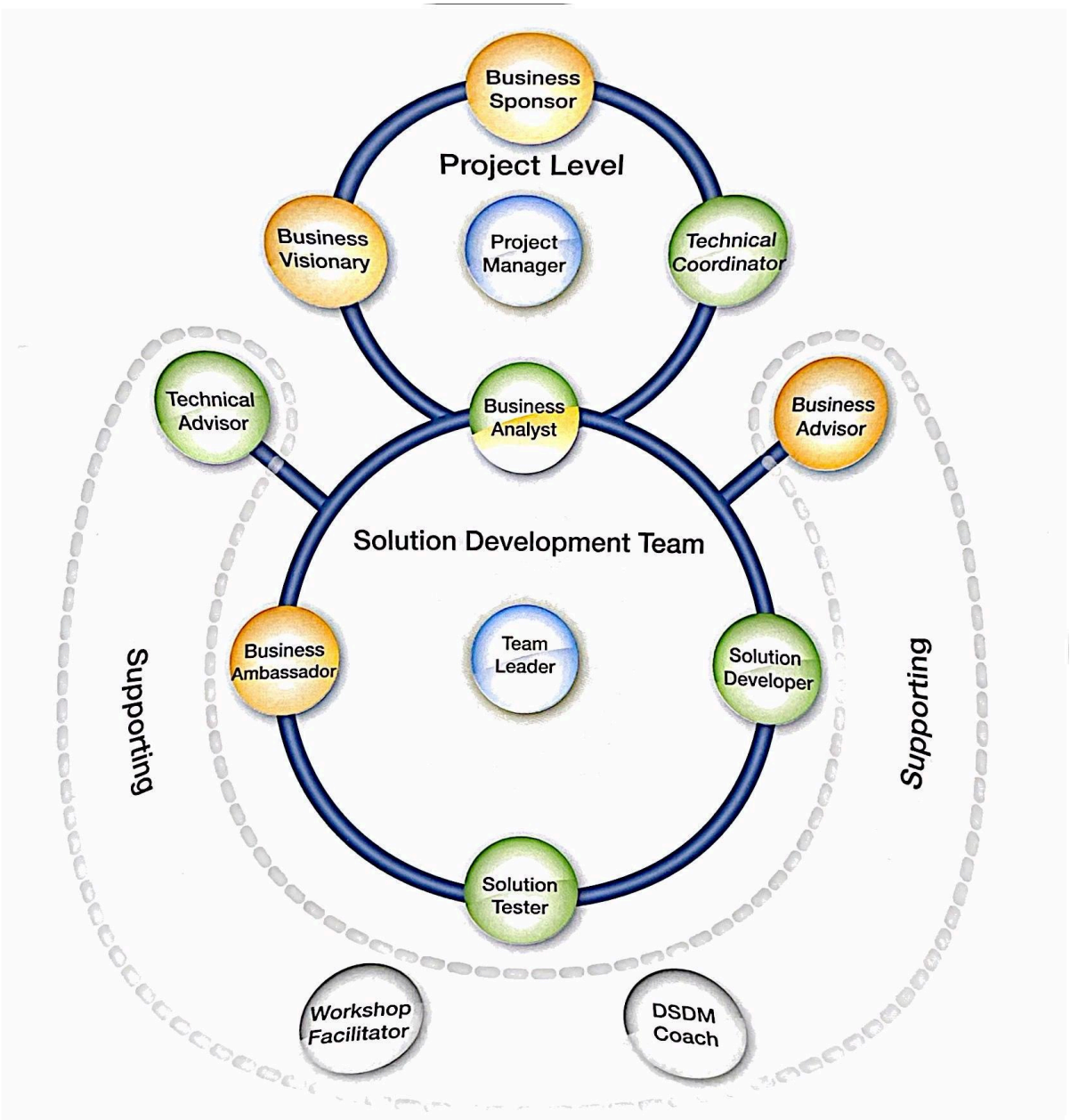
## Appendix 2

## Relationship between Stakeholder management, project phases and project complexity (Nguyen et al, 2018, p.83)



**Appendix 3**

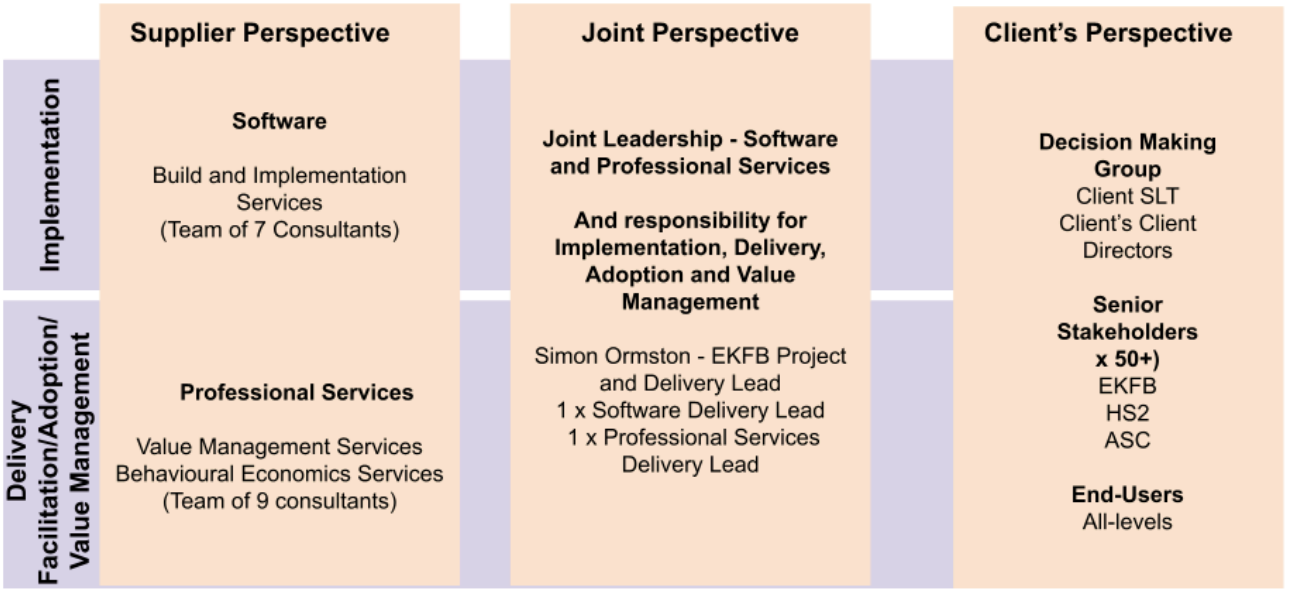
**Agile DSDM Team Roles and Organisation**
**Agile Business Consortium (2017, p.77)**



**Appendix 4**

**Stakeholder and Joint Delivery Structure**

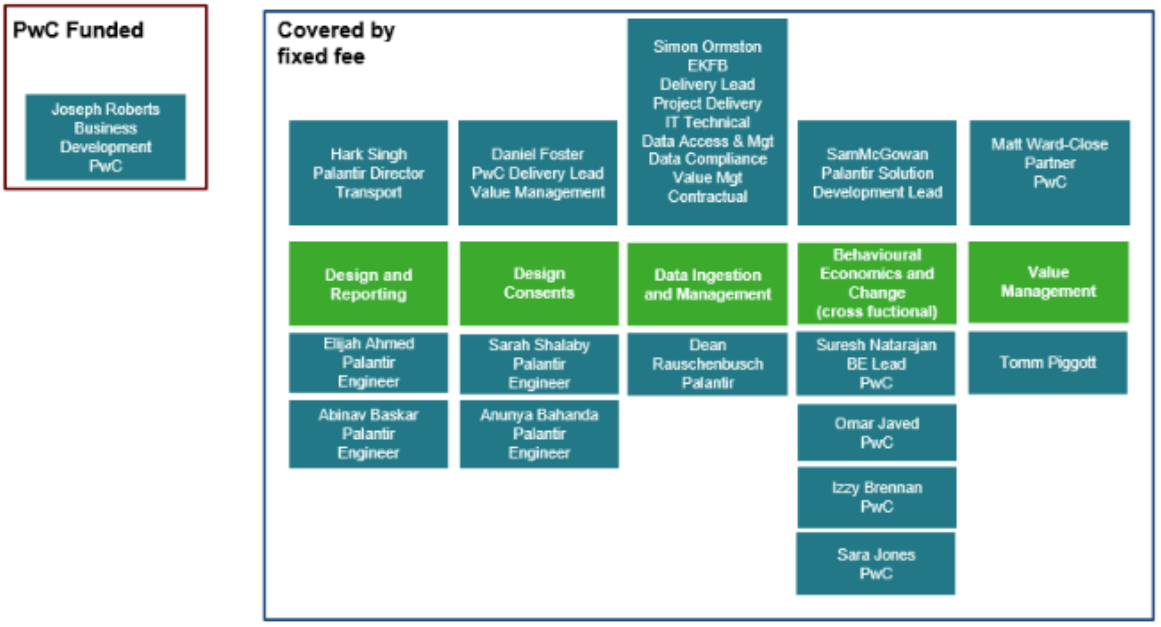
**Adapted from Woodburn and McDonald (2011 p.300)**



## Appendix 5

## IOP - Delivery Team Organisation

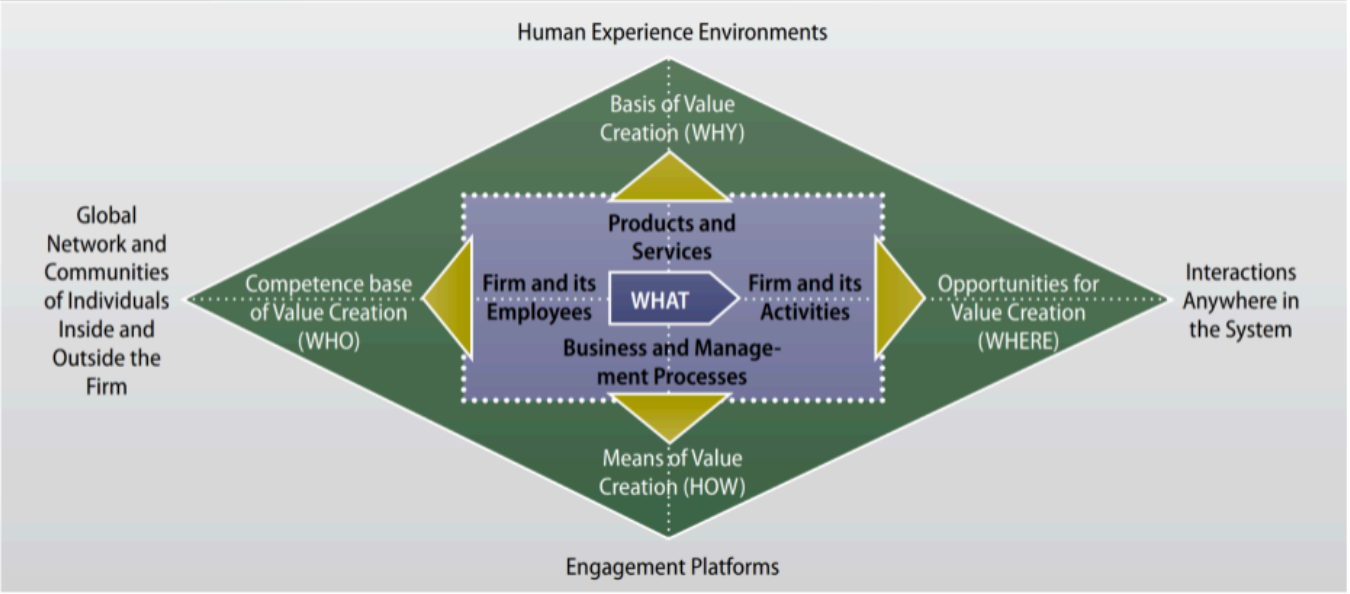
Resources: 16
EKFB = 1
Palantir = 7
PwC = 8



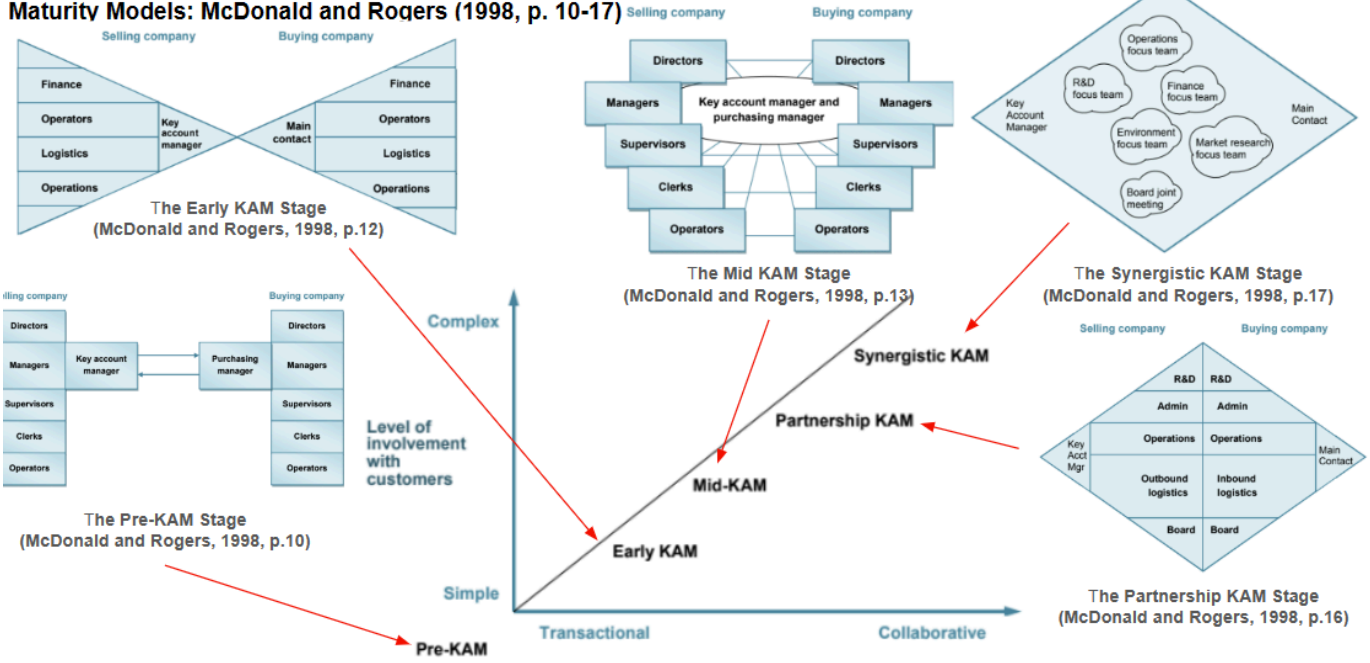

**DRAFT FOR DISCUSSION**

**Appendix 6**

**Co-Creation as Expanding Conventional Value Creation**
**Ramaswamy/Gouillart (2010)**



**Appendix 7**
**Key Account Relational Development Model (Millman and Wilson, 1995)**
**Maturity Models: McDonald and Rogers (1998, p. 10-17)**




Key Account Relational Development Model (Millman and Wilson, 1995)

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