



# Expertise Management for Professional Services

What it is, why it matters, and how it drives operational efficiencies

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# Expertise Management

What is expertise management? — Expertise management is a discipline within knowledge management that focuses specifically on the knowledge sales, marketing, and business development required to win new business. It focuses on ensuring that you have, at your finger tips, the data you need to clearly communicate your firm's experience and the unique skills and expertise of your people.

Expertise management is a strategic practice that enables professional services firms to centralize their knowledge and expertise, creating a multitude of invaluable efficiencies and business value for the organization because it enables the firm to leverage its greatest asset—people—with precise efficiency.

Expertise management is the systematic process of capturing, organizing, and leveraging the collective knowledge and expertise gained from past projects, client engagements, and experiences within the organization and creating business value that flows through the entire organization, starting with:

**Data collection:** Expertise management starts with collecting data on all past projects, client interactions, and engagements. This includes details like project scopes, outcomes, client feedback, team members involved, and any unique challenges or solutions implemented.

**Centralized knowledge repository:** The collected data is stored in a centralized knowledge repository or database. This repository should be easily accessible and searchable by team members, allowing them to retrieve relevant information quickly.

**Tagging and categorization:** To make information retrieval efficient, experiences are typically tagged, categorized, and indexed based on various criteria such as industry, client, service type, location and project size.

When preparing proposals and bids for new projects, expertise management enables you to reference past successful projects that are similar in scope or requirements. This provides credibility and demonstrates your firm's expertise.

The insights gained from past experiences can be used to strengthen client relationships. Knowing what worked well in previous engagements allows you to tailor your services to meet client expectations more effectively.

Expertise management can help identify potential risks and challenges early in the project planning process. By analyzing past experiences, you can identify areas for improvement in your processes, service delivery and client interactions.

Ultimately, leveraging your firm's collective experience can give you a competitive advantage. Clients are more likely to choose a firm with a demonstrated history of delivering successful outcomes, including:

- ✓ **Winning new business more efficiently and cost-effectively**
- ✓ **Responding to more RFPs faster by generating consistent, on-brand proposals**
- ✓ **Efficiently growing the business by making siloed practice information available company-wide**
- ✓ **Simplifying company experience and make it reusable for complex pitches and proposals.**
- ✓ **Automatically generating consistent, brand-friendly proposals and pitches.**
- ✓ **Highlighting past and current work for the firm to see, enabling outside sales and cross-selling.**

# Leverage Your Most Valuable Asset: People

Every firm aims to optimize its operations by eliminating everything that is an unnecessary burden on its workforce, taking a surgical instrument to efficiency and cost-effectiveness, and breaking down the silos of information to unlock the potential of and empower its most valuable asset: people.

It is all-too commonplace, however, for many firms to be precisely challenged in this way: information is disaggregated across siloed systems, creating multiple touchpoints of operational burden for professionals as well as operational drag on efficiency and cost-effectiveness.

The discovery of the firm's own people becomes so cumbersome as to seem an insurmountable challenge and the business value of that expertise is squandered.

In an intensely competitive market, firms must find ways to differentiate from competitors in order to impact client service, client value, operational excellence and win rates. This will mean breaking down the silos of information, eliminating unnecessary burden on the firm's workforce, and creating seamless access to the firm's expertise and powerful efficiencies that enable firms to make the most of their expertise data.

Expertise management is one key way organizations are achieving this. Here are some of its key features.

# An Array of Business-Critical Solutions: CV Automation, Expertise Matrices, Proposal Generation and Availability

Centralizing the firm's experience data provides business benefits that flow throughout the organization, not only eliminating inefficiencies but empowering the organization to leverage the value of its own expertise. Firms benefit substantially improve their knowledge sharing capabilities, transforming the bidding and proposal process--ultimately providing the best possible solutions for clients.

Siloed systems that had prevented the discovery of experts, or continually out of date CVs or manual processes that made it difficult to locate the right CVs for inclusion in bids, an inability to search large databases by expertise that were roadblocks to growth—are removed.

For example, here are the 3 common business problems faced by professional services firms:

## Profile Search

"Who has expertise for this project?"

"Do we employ someone proficient in XYZ language?"

"What are our credentials for this bid?"

## Expertise

Do we have a central location for expertise up to date?

Is our expertise up to date?

What are our expertise gaps?

## Projects

"Who is available for this project?"

Have we done a similar project before?

Can we identify service opportunities base on our knowledge base?

With expertise data centralized, firms enjoy surgically efficient and accurate outputs through CV Automation, Expertise Matrices, Proposal Generation and Availability features that help drive growth and productivity. Here's more about those.

# CV Automation

Core to experience management and key to successful bids, pitches and proposals is solving the critical challenge of identifying the right persons and their CVs, verifying the accuracy of those CVs, and finally, manually QC'ing the CVs for style and brand consistency.

This process can be particularly onerous when searches are expansive or global across tens of thousands of professionals, when information is spread across multiple systems, in inconsistent formats and with no automated way to update and/or verify the accuracy and currency of the information once it is found. So much so, in fact, that the project can seem insurmountable.

CV automation radically simplifies the search for accurate CVs and resumes and enables very large packages of perfectly consistent, branded CVs to be instantly downloaded at the touch of a button and exported to a wide variety of standard bid formats such as World Bank, US Standard Form 220 and European Curriculum Vitae.

By centralizing access to all CVs within the organization in an elegant, searchable platform, and directly delivering automated CV updates through project database and profile integrations, CV Automation helps bid, proposal and staffing professionals eliminate onerous, stressful, error-prone searches and win back time with a seamless, frictionless process.

Even more, CV Automation drives simplicity and ease when creating large packages of CVs, enabling instant download of upwards of 1000's of CV/resumes at a time for RFPS, project work, and staffing requests that can be immediately exported to a wide variety of the most common bid formats, including World Bank, US Standard Form 220 and European Curriculum Vitae.



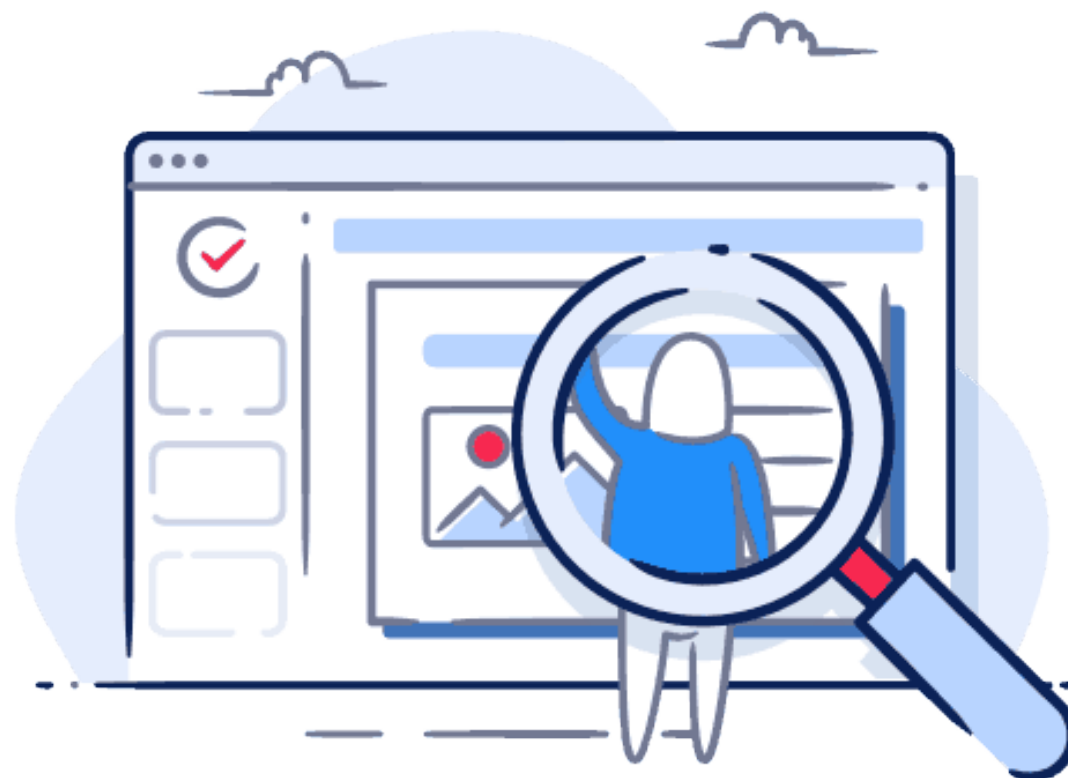
# Expertise Matrices

With Expertise Matrices, the expertise, relevant experience and competency levels of professionals is centralized into deeply detailed knowledge domain taxonomies, simplifying search to a few clicks. Once identified, users can elect to create customized profiles targeted to fulfill specific circumstances by selecting and deselecting background experiences.

Customized profiles are added to a Briefcase function and -- in just one click -- users export up-to-date, customized profiles. Additionally, bid or proposal preparers are assured of the accuracy and currency of professional profiles through an automated self-assessment portal provided to every professional in the organization.

Especially for large professional services firms, expertise matrices adds invaluable efficiencies which enable knowledge, marketing, business development and a variety of role-based users to swiftly identify the right experts in very complex knowledge domains for a vast array of business needs.

Expertise Matrices transforms the process of identifying expertise within the organization from a complex, time-consuming search prone to errors into a seamless, swift and accurate one. As a result, Expertise Matrices enables organizations to quickly leverage their own value, respond faster and better to an increasing number and variety of requests for information, and ultimately better position the organization to provide better client service and/or win more business.



# Proposal Generation

Proposal generation offers numerous benefits to professional services firms, ranging from increased efficiency and consistency to improved client satisfaction and competitive advantage. It helps firms present its expertise and services in both the most efficient way possible, but also the most accurate and effective — ultimately contributing to business growth and success.

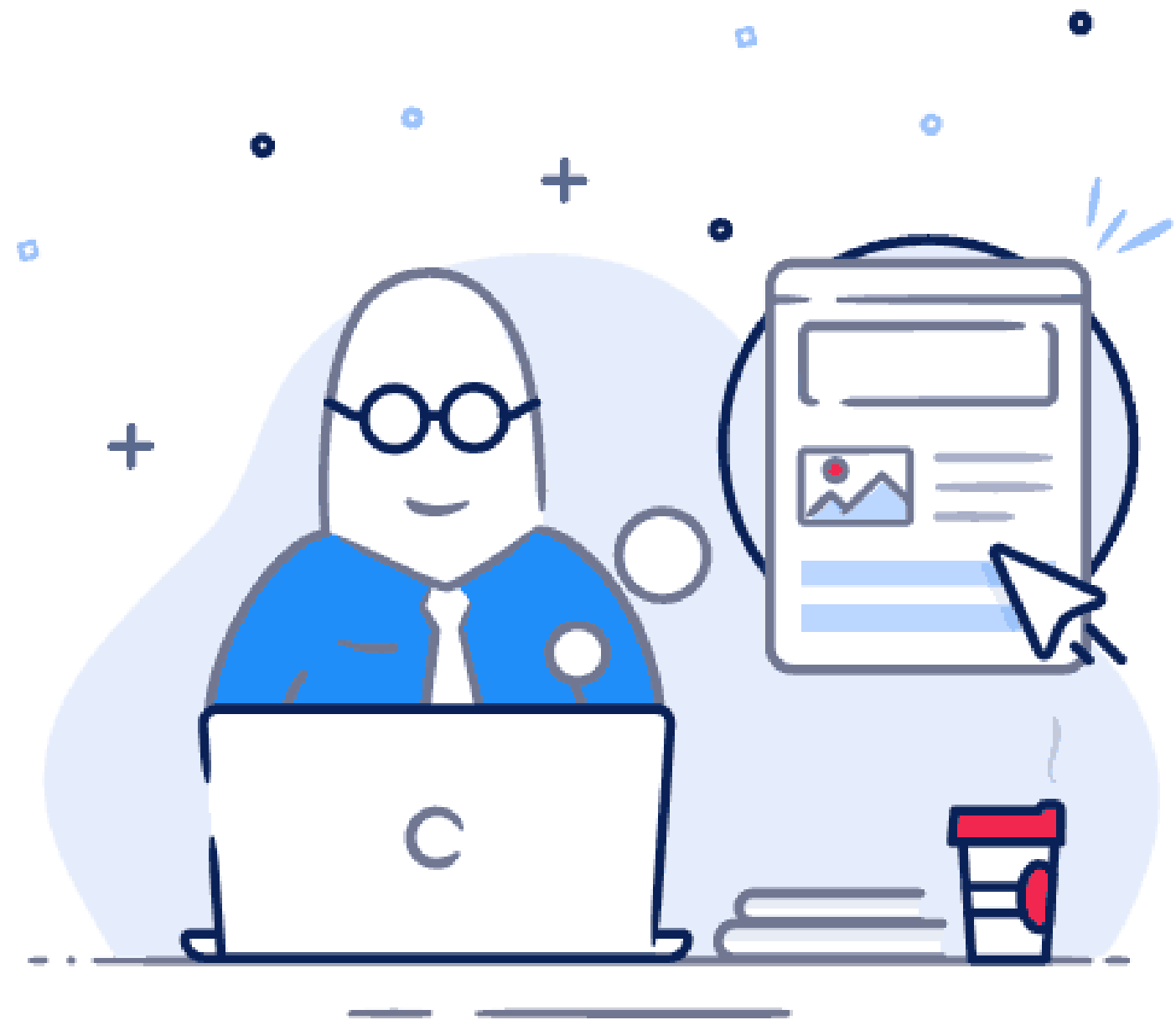
Here are some of the top benefits:

- ✓ **Increased Efficiency:** Proposal generation streamlines the creation of proposals, saving time and resources. This allows your team to focus on other critical tasks and client interactions.
- ✓ **Consistency:** A standardized proposal generation process ensures that all proposals maintain a consistent format, tone, and messaging. This consistency reflects professionalism and reliability to clients.
- ✓ **Quality Assurance:** Proposal templates often include pre-approved content, reducing the likelihood of errors or omissions in proposals. This ensures that your firm presents itself in the best possible light.
- ✓ **Customization:** While templates provide consistency, they also allow for easy customization. You can tailor each proposal to the specific needs and preferences of individual clients, demonstrating a client-centric approach.
- ✓ **Faster Turnaround:** With pre-built templates and content libraries, you can respond to client requests more quickly. This agility can be a significant advantage in competitive industries.
- ✓ **Improved Collaboration:** Proposal generation tools often enable collaboration among team members, even if they are geographically dispersed. This enhances teamwork and knowledge sharing.
- ✓ **Tracking and Analytics:** Many proposal generation tools provide tracking and analytics features. You can see when clients open proposals, which sections they focus on, and how long they spend on each part. This data can inform follow-up strategies.
- ✓ **Version Control:** Maintaining version control is crucial in proposal generation. These tools often include versioning features to help you keep track of revisions and changes.
- ✓ **Compliance and Governance:** Proposal generation tools can help ensure that all proposals adhere to legal and regulatory requirements. This is especially important in industries with strict compliance standards.
- ✓ **Scalability:** As your firm grows, so does the volume of proposals. Proposal generation tools can easily scale to meet the demands of a growing client base.
- ✓ **Competitive Advantage:** A well-organized proposal process can make your firm more competitive by enabling you to respond to RFPs and client inquiries more effectively.
- ✓ **Brand Consistency:** Maintaining a consistent brand image across all proposals reinforces your firm's identity and reputation in the eyes of clients.

# Availability

Availability helps firms ensure the productivity of their experts by knowing in an instant who is available, what type of work they are able to perform, even career aspirations. Associates receive weekly reminders to input their availability for the following week.

Each associate then specifies their own competencies and interests. Leadership receives an Associate Availability report each week, providing insight into the total bench and areas of expertise available, helping partners locate available people and understand their skill set and experience at a glance.





# Client case study highlight: Global Design Firm

## About Global Design Firm

This global collective of designers, engineering and sustainability consultants, advisors and experts has over 18,000 professionals worldwide in over 93 offices and 140 countries across the United States, Europe and Australasia.

## Top 3 challenges

- ✓ Employees CV's continually out-of-date + manual processes for updates.
- ✓ Difficulty locating CVs for inclusion in bids. Searching by expertise was not possible.
- ✓ Antiquated, siloed systems preventing discovery of experts.

## What ikaun did

- ✓ Imported 7,000 Word-based CV's
- ✓ Integrated the multiple existing data sources and systems into a central hub
- ✓ Deployed ikaun's Employee Profile and CV automation platform.

This global collective of designers, engineering and sustainability consultants, advisors and experts with over 18,000 professionals worldwide in over 93 offices and 140 countries across the United States, Europe and Australasia places a strong emphasis on the expertise of its professionals.

Therefore, the company sought to create, sustain and evolve a global directory of their people, their skills, expertise, experience and professional interests to substantially improve their knowledge sharing capabilities and the bidding and proposal process--ultimately providing the best possible solutions for the firm's clients.

Historically, individual regions managed file shares where CVs for pitches and bids were stored; however, CV owners did not own the process of updating their content and, instead, professionals creating the bids were tasked with describing the work of individual professionals, a labor-intensive process. If bid preparers were not already familiar with individual expertise, locating professionals by expertise was not searchable in the current multi-platform system.

Leadership sought a solution that would make it easy for their professionals to find their experts and place them in what they call an 'expertise matrix.' This meant, their bid preparers needed to be able to easily not only locate CVs but place them all together in a package and quickly generate Word documents with ease. This would significantly reduce the amount of time spent searching and reformatting documents, reduce the time spent creating bids, and significantly increase the quality of those bids.

Leadership proposed the solution ought to centralize these capabilities into one holistic system, enabling bid prepared to locate professionals by expertise and where professionals could maintain and edit their own profiles, including project experience and publications.

In a global, competitive process, firm leadership determined that ikaun provided everything the company sought in one, complete platform.

ikaun consistently demonstrates exceptional partnership, and this is even more true during client implementations; in this instance, ikaun delivered custom capabilities, imported approximately 7,000 existing CVs, and retired two legacy systems.

On February 1, the firm proudly went live with their new system to the accolades of leadership who were excited for the potential ROI, the reduced effort and increased quality of their bid processes, and expressed exceptional delight on the functionality, UX, and CV automation features.

“ I think this is a really well thought through and delivered example of digital development. Well done to the team and whoever clearly defined the initial brief and beta-tested this so well. Thank you on behalf of a lot of the firm, the ROI on this is going to be huge. ”

“ CV automation is amazing thank you! ”