FUSION LEARNING PARTNERS - CLIENT ENGAGEMENT & SUCCESS

PLAN

FULFILL

ASSESS

Our integrated planning services and documents ensure every last detail of planning is addressed. The result are well-organized services that meet or exceed stated goals and expectations.

We will use what we learn in the planning phase to deliver upon identified goals while meeting timelines and budget. We will successfully deliver on all tasks through regular meetings and communication, making adjustments as needed.

Determining the effectiveness and success of our work is a critical part of our process. We will use a number of tools and metrics to assess overall performance as well as key performance indicators



Discovery

In order to provide exceptional service and successful outcomes, we will begin by conducting a thorough discovery and needs assessment. We will:

- Ask insightful questions to understand objectives, history and culture of the organization/program/event, as well as any past, current or anticipated challenges.
- Analyze previous performance other stakeholder feedback
- Take the time to clearly identify objectives, operating parameters and procedures as well as limitations/risks.

Internal Alignment

After the discovery phase is completed, we will align the right staff and resources to meet objectives. We will:

- Transfer discovery information with all identified team members
- Determine the most effective planning, management and implementation strategies

Program Plan

We will create a comprehensive project plan inclusive of goals, scope, work assignments, planning structure, key indicators/milestones, timelines and budget.

Initial Client Meeting

A kick-off meeting will be held to review, refine and approve the plan, and ensure alignment with roles, responsibilities, timelines, priorities and approach.

Execute

Our experienced team will implement all assigned accountabilities according to the plan, closely coordinating and communicating with other contributors and stakeholders to ensure efficiency and success.

Track Progress

Progress toward all plan components will be closely monitored, documented and shared with both internal and client planning teams.

Continuous Review - Internal

Throughout the process, our internal team led by the assigned account manager, will meet regularly to review activities, assignments and progress, brainstorm ideas and opportunities for improvement, as well as troubleshoot any problem areas.

Continuous Review - Client

Regular meetings with client representatives will keep the client fully informed, allow for collaborative ideas, provide opportunities for critical feedback and strengthen the working relationship.

Ongoing meetings will ensure:

- Clear communication of status
- Refinement of program plans
- Opportunities to improve process and outcomes

Review

After execution of the plan is complete, our team will meet to conduct an internal review of all contracted deliverables, discuss details and document lessons learned.

Evaluate

To measure success, the program or event will be assessed based on mutually agreed upon goals and specific performance metrics established in the project plan. Assessment will include results of attendee/stakeholder/client survey and/or other assessment tools as identified. All assessment information will be documented and presented in a final event report.

Report/Audit

A final report will include:

- Summary of survey data
- Analysis of survey data including yearover-year comparisons, etc.
- Final financial audit accounting for all organization/program/event revenue and expenses managed by Fusion.

Debrief

A thorough, final "wrap-up" meeting will be conducted to review the final event report, discuss lessons learned and document recommendations for continuous improvement.