Consultancy delivery handbook

Status: December 2023

Document owner: Anna Klissouras



- 1 The purpose of this manual is to assist Anna Klissouras Solutions (AKS) in ensuring the quality of its
- 2 business operations and consulting services in accordance with ISO 20700:2017.

1. Corporate Quality Assurance

- 4 This section provides a summary of how AKS ensures the quality of its business operations at the
- 5 corporate level.

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6 a) Company Profile

- 7 Anna Klissouras Solutions (AKS) is a management consulting firm based in Greece and operating in
- 8 Europe through a combination of remote work and travel as required. Founded in September 2023 by its
- 9 owner Anna Klissouras, it is a sole proprietorship with no additional employees.
- 10 AKS focuses on three key pillars: 1) Development of customized business solutions for business
- development; 2) Development of communication strategies including marketing, public affairs and PR; 3)
- 12 Development and management of complex projects.
- 13 Find further information on <u>www.anna-klissouras.com</u>.

14 b) Qualifications

- 15 Anna Klissouras has 15 years of international and German experience in marketing and communications
- 16 leadership, public affairs management, business development, digitalization of SMEs and project
- 17 management from Amazon, her own company, technology companies and the United Nations. Prior to
- 18 founding AKS, Anna Klissouras was a senior manager at Amazon Europe. She holds a dual degree in
- 19 International Management from top business schools (ESCP Europe and MDI India), where she graduated
- 20 with distinction, as well as a Master's degree in Philosophy and Art History from Humboldt University
- 21 Berlin and the University of Cologne. As a result, Anna Klissouras has in-depth experience in all of AKS'
- 22 consulting areas with dozens of references. She keeps abreast of relevant business and legal
- 23 developments through online media, industry events and associations.
- 24 Find further information about Anna Klissouras's qualifications on https://www.anna-
- 25 <u>klissouras.com/about-me</u> and <u>www.linkedin.com/in/annaklissouras</u>. Find project references on
- 26 https://www.anna-klissouras.com/business-consulting.

27 c) Code of Conduct

- 28 AKS is committed to high and consistent professional standards in delivering its consultancy services.
- 29 These include:
- 30 1. Measurable and lasting impact
- 2. Confidentiality regarding client information and assets
- 32 3. Independence and neutrality
- 4. Honest and transparent communication regarding project deliverables and pricing towards prospectclients
- 35 5. Honest and transparent communication and documentation towards clients
- 36 6. Legal compliance in all respects of the business
- 37 To maintain a high level of operational excellence, AKS follows a standard quality assurance process
- 38 based on ISO 202700:2017 (see chapter 2).

39 **d) Terms and conditions**

- 40 Pricing and payment: AKS charges an hourly rate of 300€/hour, 250€/hour for more than 4 booked
- 41 hours and negotiable project prices. Travel costs are not included in agreements, unless explicitly
- 42 stated. If travel is required, it will be charged at a lump sum of 1.000 Euros for a two-day trip within

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- Europe plus 200 Euros for each additional day. Travel costs outside of Europe will be agreed on a case by case basis. Payments are made after delivery of services via bank transfer, credit card (via Stripe), Paypal, or Klarna.
- Termination of contracts by the client prior to the start of the project will result in a 50% refund by the consultancy of the work order amount. Terminations after the start of the project will not be refunded.
- Non-delivery of the work order by the consultancy will result in a 100% refund by the consultancy of the work order amount. Part-delivery of the word order by the consultancy will be partly refunded based on the amount of work delivered.
- Working hours: AKS is available by default between 9 and 6 PM CET, unless otherwise agreed with the client. Emails are addressed within a day, chat requests are addressed on the same day. Services are provided remotely by default. Physical meetings with the client can be arranged on demand.

2. Quality assurance of consulting services

- This section describes AKS standard consulting process which is used consistently to ensure the quality of its consulting services in adherence to ISO 20700:2017 standards.
- 57 a) Client acquisition

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- 58 All prospect clients who take in interest in AKS via its marketing channels or referrals receive a free
- 59 introductory call in which AKS describes its capabilities and the client will describe his needs.
- 60 b) Project planning
- Based on the insights gained from the prospect client, AKS drafts a project proposal. It should at
- 62 minimum contain the following aspects:
- Document the client's overall business model, goals and business environment
- Measurable project objectives
- 65 Project timeline
- 66 Project scope
- 67 Project deliverables
- Internal or external dependencies with an impact on the project (eg client policies, regulatory restrictions)
- 70 Project risks and mitigation strategies
- 71 Required financial resources of AKS and the client
- 72 Required human resources of AKS and the client
- 73 Decision-makers and approval processes of the client

74 c) Project set-up

- 75 Upon agreement with the prospect client, AKS sets up the project, including:
- Signing an agreement and NDA with the client. The agreement will use AKS standard agreement
 template or customized in agreement with the client, and at minimum contain:
 - Objectives
 - Deliverables
 - Timelines
- 81 o Pricing
- 82 o Policy for termination of contract
- 83 Defining AKS and client team members
- 84 Defining required approvals and approval processes of the client
- 85 Agreeing on a project plan with timelines and milestones
- 86 Set up the workplace incl. file sharing system, communication channels and meeting series.

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Standardize processes for client engagement, data collection, and solution development to ensure
 consistency and quality

89 d) Client insights and analysis

- 90 AKS gathers relevant client insights to derive a feasible course of action, including for example:
- 91 Quantitative business data
- 92 Qualitative interviews with employees and/or clients
- 93 SWOT analyses

94 e) Strategy development

- 95 AKS develops a tailored project strategy based on the agreed project proposal and refined by the agreed
- 96 project set-up and outcomes of the client insights analysis.

97 f) Implementation

- 98 AKS implements the project based on the project plan. In doing so, it ensures qualities via the following
- 99 mechanisms:
- 100 Maintain the project tracker and regularly share status updates with the client
- 101 Document all meetings and additional agreements
- 102 Save all project related document on the shared workspace and use versioning and permission
- 103 control
- Responding to all client emails within a day and to chat messages same day
- 105 Use consistent document formats as agreed with the client (eg project software, PPT, doc, or Excel)

106 g) Monitoring and Evaluation

- 107 Throughout the consulting process, AKS monitors and evaluates the progress and outcomes of actions.
- 108 This includes:
- 109 Tracking performance against goals on a regular basis (eg at milestones agreed with the client)
- Conducting regular reviews of project milestones. Consultants should use this information to make adjustments as needed and ensure the successful delivery of services.
- 112 Establish mechanisms for collecting client feedback, such as surveys or interviews, to assess
- satisfaction levels and identify areas for improvement.
- Conduct regular internal audits to identify non-conformities and opportunities for improvement.
- Implement corrective and preventive actions to address identified issues and prevent their
 recurrence in future consulting engagements.
- 117 Conduct a final review with internal and client stakeholders to assess overall performance and derive
- 118 learnings for future projects