

Reconsidering our Referral Strategy (President)



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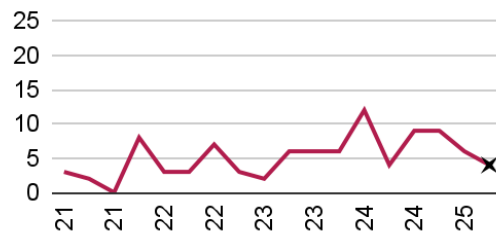
Sandia Laboratories

- Current Process
- Committee Discussion
- Proposed path forward

Current Referral Process

- Grew out of referrals for Beer Game facilitators run by Roberta
- Society maintains a talent pool list
 - Anybody can join the talent pool through Society website
- Anybody can request a referral
- Rebecca matches based on trust network from talent pool
 - Rebecca asks talent if they're interested, then sends referrals to requester
- 10% referral fee paid by talent

Referral Requests



Referral fees bring in
~\$1,000/year

Concerns About Current Referral Process

- Is this an appropriate activity for the society?
- Fairness (level playing field)
- Quality control
- Perception of responsibility for any problems
- Appropriateness of collecting the referral fee

Alternatives - Developed by the Society Staff

Matchmaking Decision Maker	Choice	Rebecca	Staff Member	Volunteer	Committee	Automated Based on Criteria	Client
Talent Pool	Choice	Anyone	Members Only	Sponsors Only			
Quality Control	Choice	None, have disclaimers	Self Identified Experience	Rebecca's Trust Network plus Self Identified Experience	Trust Network	Certification	
Selection Process	Choice	Client Selects, help with location filter	Screening Based on Experience, Geographic Requirements, Industry, Talent				
Referral Fee	Choice	None	10% for referral only	10% with \$10,000 Cap for referral only	10% for sales and administrative work	None, Joint Venture with Society, Agreed Upon Fee	None, Society Contracts and Pays Subcontractor
Fee Payer	Choice	None	Member Benefit	Practitioner	Client	Both Practitioner and Client	
Talent List Access	Choice	Anyone (Public Listing)	Members Only	Office Only			
Matchmaking Rules	Choice	Tiered Access (Primary Tier: Certified members, long-term contributors, or those with vetted project history. New or less-active members (offered referrals if primary tier is unavailable).)	Rotational System	All Trusted Talent that Confirms Desire for Referral is Sent to Client	None		
Referral Number	Choice	All Trusted Talent (No Limit)	Top Choice Only	Limit to Three Referrals	Limit to Five Referrals	All Talent	

Committee Discussions

- Established a committee
- Committee considered the current process and potential alternatives, developed a recommendation
- Major considerations:
 - Helping the SD field by matching talent with prospective clients
 - Fairness (level playing field)
 - Quality control?
 - Perception of responsibility for any problems

Recommendation

- Discontinue the current referral process
- The society will maintain two capabilities:
 1. Directory of consultants available for system dynamics work
 2. Mechanism for clients to post requests for work/proposals

Recommendation

1. Directory of consultants available for system dynamics work

- Each society member can add one entry (self or company)
 - Society will remind members at sign up and annually
 - Will require regular (quarterly or annual) reviews of entries
- Requesters fill out a simple form to automatically receive link
- List can be sorted and filtered
- Website will include:
 - Disclaimer (society does not endorse)
 - Suggestions for choosing a consultant
 - e.g. check references, look at previous work...

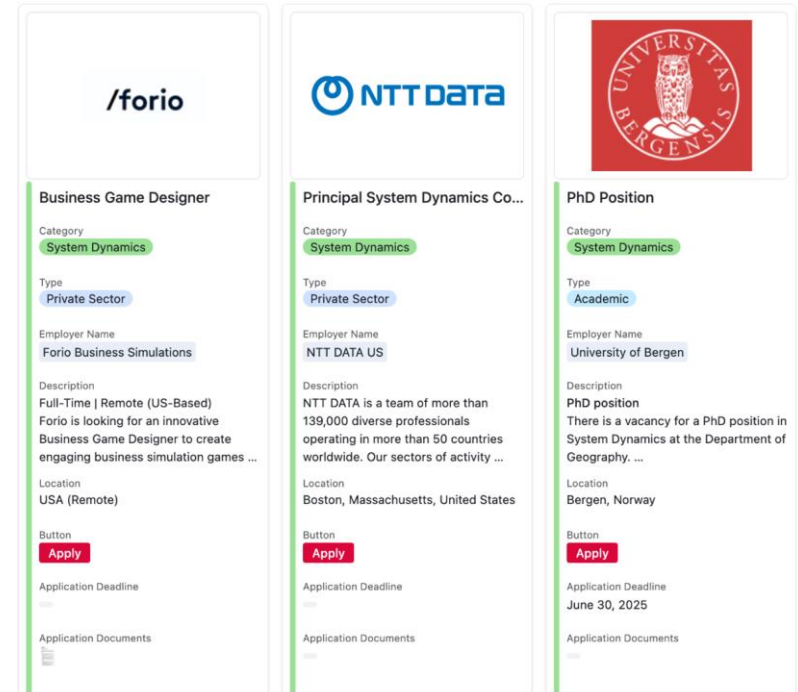
Proposed Information in Directory:

- Name (member)
- Organization
- Website or LinkedIn profile
- Geographic location
 - Willing to travel?
- Description of organization (with word limit)
- Services offered (checkboxes)
 - System dynamics modeling
 - Systems thinking
 - Game facilitation (Beer Game, Fishbanks, etc.)
 - Training courses in SD modeling
 - Group SD model building
 - Other (free response)
- Society sponsor? (checkbox)

Recommendation

2. Mechanism for clients to post requests for work/proposals

- Similar to career link
- Available for members to access
- Society will send notifications out when something is posted



Recommendation - Considerations

- With recommended structure:
 - No referral fees will be collected
 - No quality control
 - Client has responsibility to do due diligence, hire the right person
 - Should improve fairness
 - Society is not endorsing anyone

Recommendation:

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