

# COMPANY **POLICY**

## Our Vision, Mission & Values

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### **The Magic of Learning**

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## Our Vision

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At **Merlin Business Consultancy Ltd.** (hereafter referred to as Merlin Consultancy), in these post-pandemic times that we are experiencing, our clients (particularly in the hospitality and tourism industry) are struggling to maintain and sustain quality training and development of their people at all levels. At the same time, training and development opportunities are fundamental requirements for recruitment and retention.

Our vision is to grow our team, our offer, our reach and ourselves to meet these needs and be the provider of choice for all things L&D across a wide range of learning methodologies.

## Our Mission

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As a team of seasoned Learning and Development professionals, at Merlin Consultancy our mission is to serve our clients, and the learners in our care, by confidently and competently combining our knowledge of strategic thinking, behavioural science and psychology, with our consultancy skills in project management, learning design and delivery and a sound experience of impacting profitability and sustaining business improvements.

We take pride in developing and sustaining our lasting client relationships and supporting them and their people to thrive and prosper to the best of our ability.

## What we do

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Since we formed in 1989, Merlin Consultancy have continued to provide an impressive range of consistently successful solutions that facilitate people and businesses to achieve their full potential.

Our core business is people and in these changing times, it is reassuring to know that simple principles continue to succeed. We know that people perform with more positive energy when they feel inspired, committed and enthusiastic.

Directors, employees and associates work closely together, to ensure that we work collaboratively, share resources and interrogate our quality to provide best value for the projects we manage from conception to delivery.

Our training design and delivery is based on sound principles and practice of current research in both learning and humanistic psychology which ensures that it is fresh, current and inspiring in style. We also have extensive experience in delivery of award-winning programmes on a formal qualification structure.

With the significant advantage of our own in-house graphic design and media team, we can ensure that our work looks good too, as well as being able to secure good prices for print and distribution channels.

Many factors influence sustainable personal, professional and organisational success, and we have had fun over the years researching exactly what these are so that we can design and deliver the right solution at the right time and at the right price.

At Merlin Consultancy, we develop simple, elegant and integrated solutions to help learners to be the best that they can be – as if by magic.

Our range of client companies extends from global corporate organisations to small individual businesses. We are proud of our client list - partly because of the range and calibre of organisations and projects represented, and also because a high proportion of our business relationships are continuous.

With our comprehensive range of services and products, and extensive experience in the field, we provide a wide and flexible variety of solutions to enable our clients to develop their people and their performance, manage challenges and improve people processes, productivity and service delivery.

## Our Values, Promise to our Clients and Core Principles

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We are passionate about our Company, our work, our team and our clients. Our core principles inform us in everything that we do and we review each project and client assignment against them to ensure that we are living our own values.

*These values are:*

- **DEDICATION TO CLIENT SERVICE**
- **CONTINUOUS DEVELOPMENT**
- **BUILDING EXCELLENT PRACTICE**

### DEDICATION TO CLIENT SERVICE

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A large proportion of our work and expertise is vested in businesses where quality of service is the core competence. We know it is important to provide good role models and ‘walk the talk’. Our core principle of dedication to client service is supported by three key behaviours:

- **Honesty:** We have a simple faith that *“honesty is the best policy”*. We also know that honesty is the basis of trust in any relationship and authenticity gets the best results.  
  
We take full responsibility for our relationship with our clients, their people and their business. We find that being honest with each other saves time, money and energy all round.
- **Adding value:** We structure our business with a clear objective to add value to our clients. We have a well-earned reputation for being reasonably priced and pragmatic in our solutions and our comprehensive network and scale enables us to obtain competitive prices for many services.  
  
Adding value is much more than an issue of cost however. We work pro-actively with our clients to find the best solution for their needs and, most importantly, how to implement and integrate solutions to achieve maximum benefits.
- **Loyal partnership:** The core of our business is relationships. We pride ourselves on our expertise and experience in working in partnership with our clients. We find that doing so produces more positive results, develops a relationship of equality and avoids any issues of dependency.

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## CONTINUOUS DEVELOPMENT

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We have made a clear choice to be in the professional business of development and creativity. The way that we develop ourselves is fundamental to the strength of our business as well as the quality of what we offer to our clients. We have active and comprehensive development plans for each of our directors and senior consultants. For us, our work is not just to make money but provides an everyday opportunity to become more accomplished, aware and wiser.

*Our own personal and professional development activities are based on three criteria:*

- **Beyond comfort zone:** When it comes to facilitating, coaching or counselling other people, individuals or groups, the fact is that we cannot take people to places where we have not been ourselves. We find that by pushing our boundaries and extending our own comfort zones we put ourselves in the path of discovering exciting new things. It's challenging, but it keeps us fresh, resilient and creative.
- **Holistic nature:** Research supports the fact that truly effective learning is an emotional activity. A strong sense of holism helps to integrate learning in individuals, teams and organisations whilst maintaining strong individuality and sense of self. In business terms, it answers many of the questions about employee engagement and the "hearts and minds" approach necessary for sustainable results. The holistic mind, body and spirit work of Will Schutz, FIRO® and The Human Element® provides the core model for most of our people development activity.
- **Leading edge:** We are constantly engaged in research in a variety of disciplines to discover the best blend of proven practicability and becoming early adopters of new ideas and technologies. We figure that our clients want to use a consultant or facilitator who is regularly updated and endlessly curious about the "what next..." and "how can we do it better?"

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## BUILDING EXCELLENT PRACTICE

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It's quite simple – we want to continue to be proud of our Company and inspired by the way we do things ourselves.

*This means keeping sight of three key areas:*

- **Services and products:** With our comprehensive range of services and products, and extensive experience in the field, we provide a wide and flexible variety of solutions to assist our clients in developing their people and their performance, managing challenges, improving their people processes, productivity and service delivery.

Our services and product development is based on three factors – capability, collaboration and character. We like asking questions and listening to answers. We celebrate new ideas and take initiative to try new things.

Most of all, we love learning and we are constantly working on and improving our services and products.

- **Processes:** We pride ourselves on staying close to our own business processes and updating them in an ever-changing environment and as we continue to learn. We consider that role-modelling continuous improvement is an important component of helping other businesses to do the same.

- **Resources:** Over the years we have assembled a dream team of the very best people in their field. From consultants, trainers, facilitators, designers, printers, translators, and programmers, we can form flexible and client-focused teams for projects of any size. However, we keep our core team small and lean and regard this as a key strength for a number of reasons:
  - It keeps overheads down and allows us to pass on value to our clients.
  - It means that our Directors and senior consultants are focused on improving our clients' businesses and not on running ours
  - It means that we can offer clients the very best-of-the-best for their specific requirements, through both technical and related industry know-how.

Our clients have told us their own horror stories about working with larger providers and consultancies, starting off dealing with people at the very top and end up working with different people through the project, making continuity and communication problematic.

This will never happen with us - our relationship with our clients is far too important to us.

These are just a few of the reasons why we have had such long-term and sustainable relationships with so many of our clients over the years.

### How this policy will be reviewed

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These principles are re-visited each year as part of our business planning review process and updated as relevant by the Merlin Consultancy team.



Dr Hilary Cooke, Director of Merlin Business Consultancy Ltd.

12.02.23