

FOUNDER

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IVAN LEUNG

FOUNDER AT KPI
COMMERCIAL CONSULTANCY
SERVICES CO. LTD.

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TELL US ABOUT YOUR BACKGROUND, AND HOW YOU CAME TO FOUND YOUR COMPANY?



Graduated from the City University of HK, social sciences in social work, have been staying in the Graduate College of Social Work, University of Houston, came back HK afterwards, not into social work field, so decided to engage in commercial field, at first, doing marketing work and later on focus more on corporate development, and so engage in IPO projects and gradually engage in investor relations and management work.

Ivan has over 17 years of experience in branding, marketing & investor relations management. He has served in various organizations including advertising agency, media company & HK listed company.

He is responsible for the formulation of investor relations strategy, pre-IPO planning & crisis management. Currently, he is the senior executive of KPI Commercial Consultancy Services Co. Ltd., an advisory company specializing in commercial valuation, auditing, company secretaryship, investor relations & ESG service. In 2020, he founded the YouTube channel “hkworkmarketplace / 職場marketplace” sharing entrepreneurship and workplace knowledge, and had won the award of 『全國人力資源創新大賽』, from 『廣東省人力資源管理協會』 in 2021.

In recent years, Ivan is devoted to becoming a dedicated and knowledgeable professional with expertise in ESG training and carbon audit. He is seeking to contribute skills and experience to support organizations in sustainability initiatives and environmental stewardship. Ivan has recently graduated from the master program, master of corporate governance and is going to engage more on compliance, ESG and regulatory rules for listed company clients.



諾貝爾獎學人系列
未來領袖峰會暨社會關愛企業計劃



荟萃港澳青年力量 助力湾区创新发展



HOW DO YOU MEASURE THE SUCCESS OF YOUR CONSULTANCY PROJECTS?

Client satisfaction, fulfilling the request from clients, such as success in IPO, meeting the sales target of the quarterly company review, handling the HR issues for clients and successfully pitching an investor on behalf of the client etc.

WHAT TOOLS AND TECHNIQUES DO YOU USE FOR MARKET ANALYSIS AND STRATEGIC PLANNING?

Market research and PESTAL analysis, data from the government and research report from various institutions.

WHAT IS YOUR VISION FOR KPI COMMERCIAL CONSULTANCY SERVICES COMPANY LIMITED OVER THE NEXT FIVE YEARS?

01

Market Penetration: aims to establish itself as a recognized industry practitioner in the commercial consultancy industry in the region, we strive to be the go-to partner for businesses seeking comprehensive and innovative solutions to their commercial challenges, such as compliance, investor relations and ESG related issues.

02

Expanded Service Portfolio: KPI intends to broaden its service portfolio to cater to the evolving needs of its clients. This may include expanding into new industry sectors such as company secretaryship & legal advisory, offering specialized consulting services, or developing innovative solutions that address emerging business trends.

03

Embracing Technology: KPI recognizes the importance of technology in driving operational efficiency and delivering impactful solutions. The company aims to leverage cutting-edge technologies, such as data analytics, artificial intelligence, and automation tools, cloud computer and SaaS tools to enhance its consultancy processes, improve decision-making, and provide data-driven insights to clients, to meet with the uprising regulatory demands from the regulatory bodies.

04

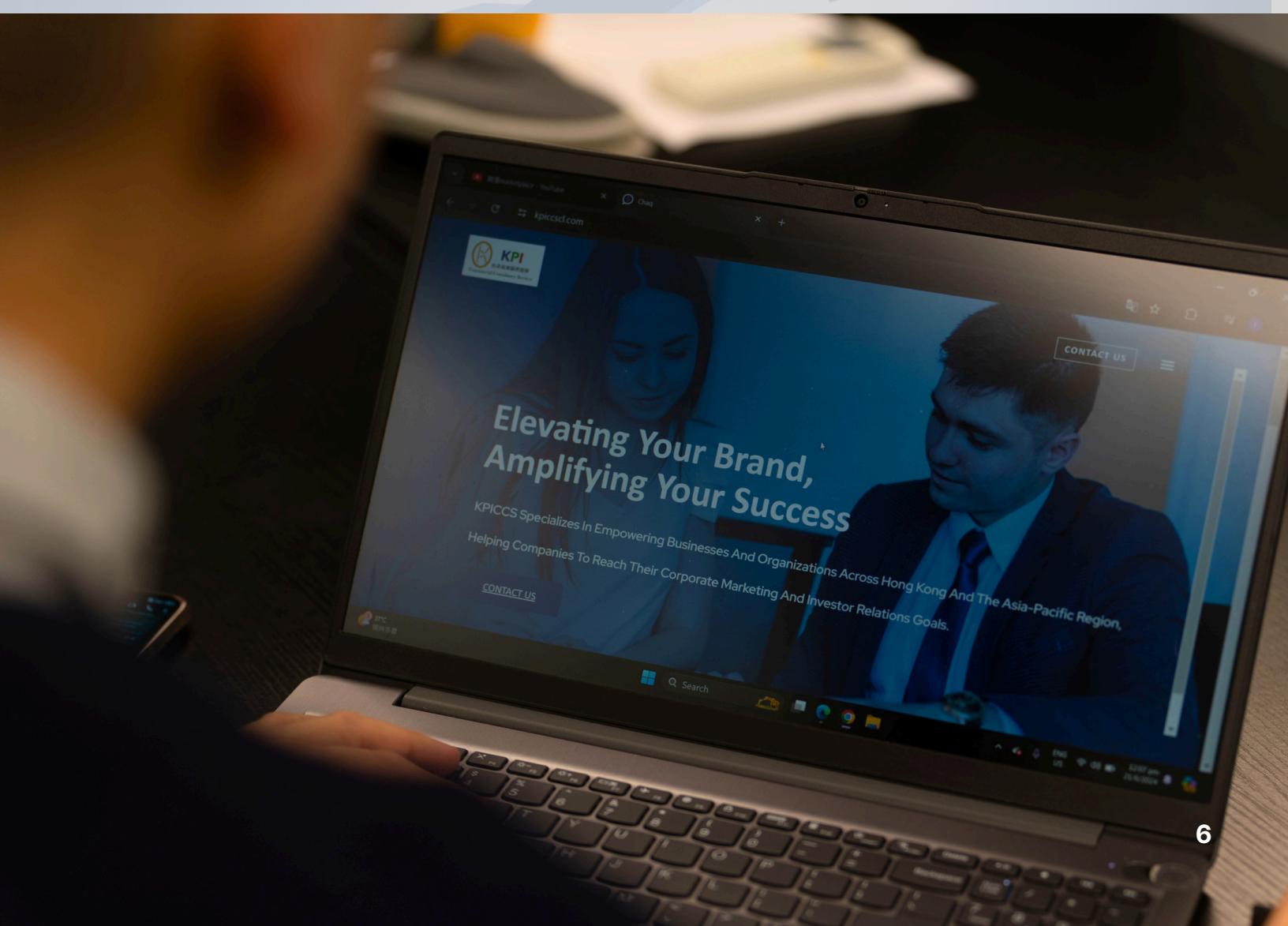
Global Reach: KPI aspires to expand its presence beyond Hong Kong and establish an international footprint. This may involve forming strategic partnerships or alliances with consultancy firms in other countries, enabling KPI to offer its services to a wider range of clients across different markets. That's why we join Asia CEO Community and hoping to expand our network in other Asian countries.

05

Talent Development: KPI recognizes that its success lies in the expertise and dedication of its people. The company aims to attract, develop, and retain top talent by providing a supportive and growth-oriented work environment. Investing in continuous training and professional development programs will ensure that KPI's consultants stay at the forefront of industry trends and deliver high-quality services to clients.

06

CSR: KPI is committed to being a socially responsible organization. It aims to integrate sustainable practices into its operations, promote diversity and inclusion, and contribute to the communities in which it operates. By acting as a responsible corporate citizen, KPI aims to make a positive impact beyond its core business activities.



WHAT STRATEGIES WOULD YOU IMPLEMENT TO EXPAND KPI'S MARKET PRESENCE AND ATTRACT NEW CLIENTS?



Establish and Maintain a YouTube Channel: Create and manage a YouTube channel, sharing valuable content regularly for the past four years to build a loyal audience.

Engage with Various Social Chambers: Actively participate in different social chambers to expand your network and stay updated with industry trends.



Utilize Digital and Referral Marketing: Implement digital marketing strategies and leverage referral marketing to reach a wider audience and foster organic growth.

Deliver Talks at Various Institutions: Offer expertise and insights by giving talks at various institutions, enhancing your reputation as a thought leader.



WHAT IS YOUR PHILOSOPHY ON CLIENT RELATIONSHIP MANAGEMENT AND CLIENT SATISFACTION?

Customer-Centric: Understand their needs, preferences, and goals, and tailor your products, services, and interactions accordingly. Strive to build long-term relationships based on trust, transparency, and mutual understanding.

Active Listening: Actively listen to clients to gain deep understanding of their challenges, feedback, and expectations. Encourage open and honest communication, and be attentive to their concerns. Effective listening helps you identify opportunities for improvement and demonstrate your commitment to meeting their needs.

Responsiveness and Timeliness: Promptly respond to client inquiries, requests, and concerns. Demonstrate a sense of urgency and show that their satisfaction is a priority. Timely communication and resolution of issues help build trust and foster a positive client experience.

Relationship Building: Invest in building strong relationships with clients beyond transactional interactions. Develop personal connection, understand business context, show genuine interest in their success. Regularly engage with clients through meetings, check-ins, & feedback sessions to maintain a strong rapport.

Exceed Expectations: Strive to exceed client expectations by going above & beyond in delivering value. Understand desired outcomes, find innovative ways to surpass those expectations. Surprise and delight clients with exceptional service, personalized offerings, or unexpected added benefits.



Continuous Improvement: Continuously seek feedback from clients and use it to improve our products, services, and processes. Actively seek suggestions for enhancement and proactively address any areas of dissatisfaction. Demonstrate a commitment to learning and evolving based on client feedback.

Transparency and Trust: Foster an environment of transparency and trust with your clients. Be honest about what you can deliver, set realistic expectations, and communicate openly about any challenges or limitations. Establishing trust is vital for long-term client satisfaction and loyalty.

Measure and Monitor Satisfaction: Implement mechanisms to measure and monitor client satisfaction. This can include surveys, feedback forms, and performance metrics. Regularly assess client satisfaction levels and use the insights gained to drive continuous improvement initiatives.

Service Recovery: Mistakes and issues can occur, but it's how you handle them that matters. Promptly address any client concerns or complaints and take responsibility for resolving them. Demonstrate empathy, offer appropriate solutions or compensation, and use the experience as an opportunity to strengthen the client relationship.

Collaboration and Partnership: Position yourself as a trusted partner rather than just a service provider. Collaborate with clients to understand broader business objectives and align offerings accordingly. Seek opportunities for joint problem-solving and co-creation, fostering a sense of partnership and mutual success.



Client relationship management and client satisfaction are ongoing processes that require consistent effort and attention. By prioritizing the needs of clients, providing exceptional service, continuously improving based on feedback, we can build strong and long-lasting relationships while ensuring their satisfaction.

CAN YOU GIVE AN EXAMPLE OF A TIME WHEN YOU TURNED AROUND A DIFFICULT CLIENT RELATIONSHIP?



I was working as a commercial consultant for a Hong Kong-based company, and we had a client who was dissatisfied with our services. The client felt that our recommendations did not meet their expectations, and there was a growing sense of frustration and mistrust between us. To address this challenging situation, we took the following steps:

Active listening and empathy: we scheduled a meeting with the client to listen attentively to their concerns and frustrations. I approached the conversation with empathy, acknowledging their perspective and the impact their dissatisfaction had on their business.

Understanding the root cause: I probed deeper to understand the specific reasons behind their dissatisfaction. By asking open-ended questions, I uncovered that their main concern was a misalignment between their business goals and the recommendations we provided. They felt that our solutions did not sufficiently address their unique challenges.





Reassessment and customized approach: With clear understanding of client's concerns, I reassessed their business goals, objectives, and expectations. I collaborated with my team to customize our approach and develop tailored recommendations that aligned more closely with their specific needs.

Transparent communication: we established a transparent line of communication with the client, providing regular updates on our progress and involving them in the decision-making process. We ensured that they were aware of the adjustments we were making to address their concerns and emphasized our commitment to their success.

Building trust through results: We focused on delivering tangible results to regain the client's trust. We implemented the revised recommendations and closely monitored the outcomes. Through regular reporting and data analysis, we demonstrated the positive impact our solutions were making on their business performance.

Continuous improvement and learning: Throughout the process, I maintained an open mindset and encouraged feedback from the client. We treated the situation as an opportunity for growth and improvement. By actively incorporating their suggestions and learnings, we showed our commitment to their satisfaction and long-term success.

Going the extra mile: To further rebuild the client's confidence, we went the extra mile by providing additional support and value-added services. This included organizing workshops for their team, conducting training sessions, and offering ongoing consultation to address any emerging challenges.

Through these efforts, we were able to turn around the difficult client relationship. The client gradually regained confidence in our services, and their level of satisfaction improved significantly. This positive transformation not only strengthened our working relationship but also led to additional business opportunities and referrals from the client.

In summary, by actively listening, understanding the root cause, customizing our approach, maintaining transparent communication, delivering results, and demonstrating a commitment to continuous improvement, we successfully turned around a difficult client relationship and restored trust and satisfaction.



Can you describe a time when you successfully led a company through a significant change or transformation?



Helping an investor to acquire a Hong Kong based digital marketing agency and incorporate the company into the group (Canada), and transform the local firm into an international firm by hiring new staff, changing of client portfolio and the management team, as a result, the company has migrated.

To manage the complexity of the transformation, we adopted incremental approach. Rather than attempting a massive overhaul, we prioritized key areas for digitalization such as customer engagement, internal processes & data analytics. This allowed us to showcase early wins, build momentum and gradually expand the transformation across the organization.

Recognizing that digital transformation requires new skills and competencies, we invested in training and upskilling programs for employees. On behalf of the client, we organized workshops, brought in external trainers, provided online learning resources to ensure everyone had the necessary digital literacy to embrace the changes. We encouraged culture of continuous learning & experimentation.

HOW DO YOU LEVERAGE TECHNOLOGY TO IMPROVE CONSULTANCY SERVICES AND DELIVER BETTER RESULTS FOR CLIENTS?



Data Analytics: Technology enables consultants to gather, analyse, and interpret large volumes of data efficiently. Advanced analytics tools can uncover valuable insights, patterns, and trends, helping consultants make data-driven recommendations and strategic decisions. Data analytics also enables the identification of areas for improvement, optimization, and risk mitigation.

Automation and Process Efficiency

Efficiency: Technology can automate repetitive and time-consuming tasks, freeing up consultants' time for higher-value activities. Workflow automation, document management systems, and project management tools streamline processes, improve efficiency, and reduce human error. This allows consultants to focus on strategic thinking, problem-solving, and delivering personalized services to clients.

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Collaboration and Communication: Technology facilitates seamless collaboration and communication between consultants and clients. Virtual meeting platforms, project management software, and cloud-based document sharing enable real-time collaboration, regardless of geographic locations. Consultants can engage with clients, share progress updates, and gather feedback promptly, improving overall efficiency and responsiveness.

Knowledge Management: Technology platforms can serve as centralized repositories for knowledge and best practices. Consultants can access relevant resources, case studies, templates, and industry research, fostering knowledge sharing and ensuring consistent quality across projects. This accelerates learning, helps consultants stay up-to-date with industry trends, and enhances the value delivered to clients. (Lexis® Opvisor™ Top-tier Experts (lexisnexis.com), the online contributor of LexisNexis).

Virtual Consultancy and Remote Services: Technology enables consultants to provide virtual consultancy services, breaking geographical barriers. Virtual meetings, video conferencing, and remote collaboration tools allow consultants to engage with clients globally, expanding their reach and delivering services more conveniently. This flexibility improves accessibility and enables consultants to serve a diverse client base effectively.

Artificial Intelligence and Machine Learning: AI and machine learning technologies can augment consultancy services in various ways. Natural language processing algorithms can assist in analyzing unstructured data, such as customer feedback or industry reports, to extract insights. AI-powered chatbots can provide instant support and answers to common client queries. Predictive analytics models can help consultants forecast outcomes and make proactive recommendations.

Visualization and Reporting: Technology enables consultants to present complex information in a visually appealing and easily understandable manner. Data visualization tools, dashboards, and interactive reports help consultants communicate insights effectively and engage clients in meaningful discussions. Visual representations of data facilitate decision-making and enhance client understanding of recommendations.

Continuous Learning and Professional Development: Technology offers a wealth of learning resources for consultants to continuously develop their skills and stay updated with industry trends. Online courses, webinars, and virtual workshops provide convenient avenues for professional development. Consultants can acquire new tools, methodologies, and domain knowledge, expanding their expertise and delivering greater value to clients.



HOW DO YOU BALANCE SHORT-TERM FINANCIAL PERFORMANCE WITH LONG-TERM STRATEGIC GOALS?

INVEST IN FUTURE TECHNOLOGIES:

Focus on investing in emerging opportunities like cryptocurrencies and IT-related tools.



STOP INVESTING IN FIXED ASSETS

Shift focus away from investing in fixed assets.



INCREASE CASH FLOW PERFORMANCE:

Implement strategies to enhance cash flow performance.



INVEST IN ESG-RELATED INDUSTRIES:

Direct investments towards industries and topics related to Environmental, Social, and Governance (ESG) principles.



WHAT STEPS WOULD YOU TAKE TO IMPROVE OPERATIONAL EFFICIENCY WITHIN KPI COMMERCIAL CONSULTANCY SERVICES?

Conduct a comprehensive operational analysis: Begin by conducting a thorough analysis of the company's current operations to identify areas of inefficiency. This includes reviewing processes, workflows, and resource allocation.

Set clear and measurable goals: Define specific objectives for improving operational efficiency, such as reducing response time, streamlining processes, or optimizing resource allocation. Ensure that these goals are measurable and align with the company's overall strategic direction.

Implement technology solutions: Leverage technology to automate and streamline processes. Identify areas where manual tasks can be replaced or simplified through software solutions, such as customer relationship management (CRM) systems, project management tools, or enterprise resource planning (ERP) systems. This can help reduce errors, improve data accuracy, and enhance collaboration among team members.

Foster a culture of continuous improvement: Encourage employees to actively participate in identifying and implementing process improvements. Establish channels for feedback and suggestions, such as regular team meetings, suggestion boxes, or online collaboration platforms. Recognize and reward innovative ideas and successful process optimizations, fostering a culture of continuous improvement.

Invest in employee training and development: Provide employees with the necessary skills and knowledge to perform their tasks efficiently. Offer training programs, workshops, or access to online courses that enhance their technical and soft skills. This investment in employee development can result in increased productivity, higher job satisfaction, and a sense of ownership over their work.

Streamline communication channels: Evaluate the company's communication channels and identify opportunities for improvement. Implement efficient communication tools, such as project management software with integrated messaging or collaboration platforms, to facilitate effective and timely communication among team members. Minimize unnecessary meetings and encourage concise and clear communication practices.



Monitor and analyse performance metrics: Continuously monitor and analyse key performance metrics to track progress towards operational efficiency goals. Regularly review KPIs and operational data to identify trends, areas that need improvement, and potential bottlenecks. Use this data to make data-driven decisions and adjust strategies as needed.

Collaborate with strategic partners: Look for opportunities to collaborate with strategic partners or vendors who provide specialized expertise or resources. It helps streamline operations, enhance service delivery, and reduce costs through economies of scale or outsourcing non-core functions.

Embrace a sustainable approach: Consider integrating sustainability practices into the company's operations. This can involve adopting eco-friendly initiatives, optimizing energy consumption, reducing waste, and implementing responsible procurement practices. Sustainable operations can improve cost-efficiency and enhance the company's reputation in the market.

Regularly review and adapt strategies: Continuously reassess the company's operational strategies and adjust them as needed. Business environments are dynamic, so it is essential to stay agile and adapt to changing market conditions, customer demands, and technological advancements. Regularly review operational efficiency initiatives and optimize them to ensure they remain aligned with the company's objectives.



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HOW DO YOU ENSURE THAT YOUR TEAM CONSISTENTLY DELIVERS HIGH-VALUE SOLUTIONS TO CLIENTS?

Internal Control and Colleague

Cross-Checking: Clearly defined procedures and protocols guide employees in performing their tasks, reducing the risk of mistakes and enhancing overall productivity.



Continuous Improvement:

Collecting and analyzing feedback from clients is crucial. This information provides valuable insights into customer satisfaction and areas needing improvement.

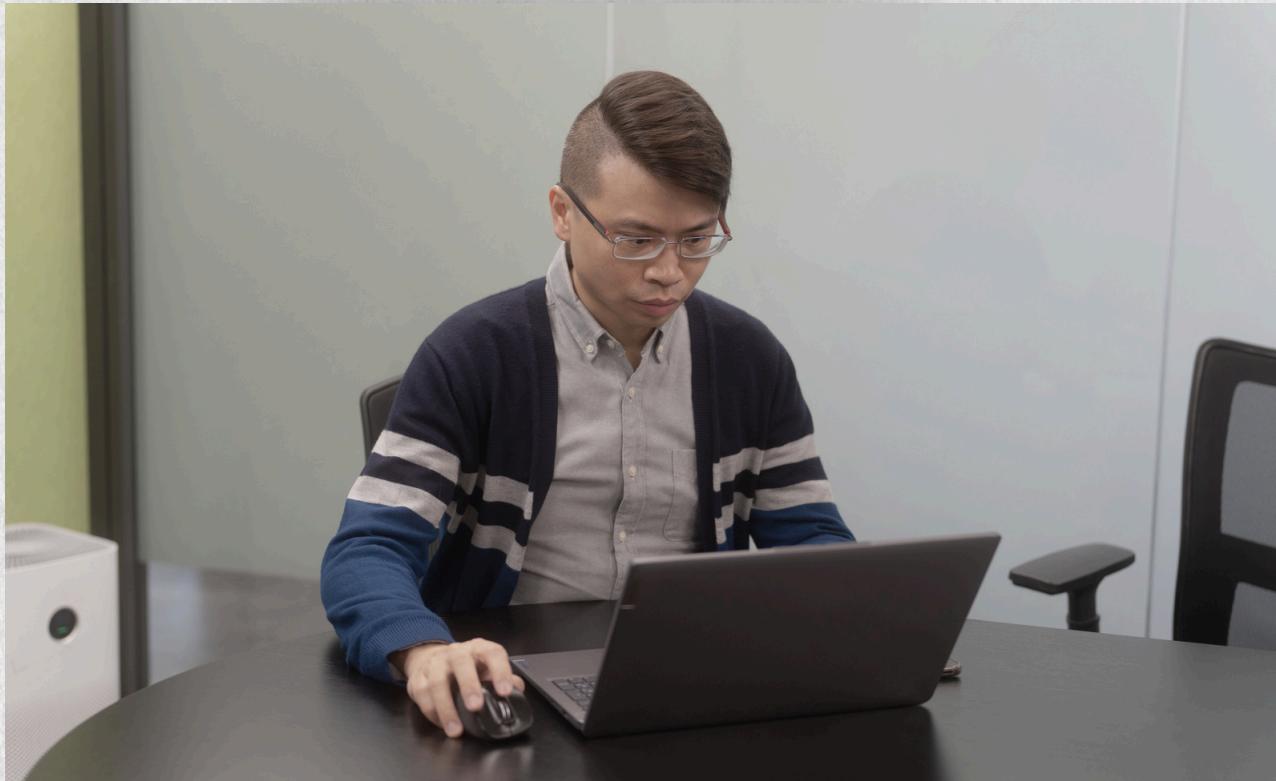


Management Supervision:

Management plays a vital role in overseeing the internal controls and overall business operations. Regular supervision and audits by management help in identifying potential issues early and addressing them promptly.



WHAT LESSONS HAVE YOU LEARNED FROM PAST FAILURES OR SETBACKS, AND HOW HAVE THEY SHAPED YOUR LEADERSHIP APPROACH?



Because of trust, I cooperated with a friend and lost 0.8 million HKD many years ago in the 2010s. This happened because I did not sign a proper contract with the friend, lacked internal control measures, and did not understand the entire operation process.

This experience taught me the importance of having contracts and adhering to the spirit of compliance and regulation. It also underscored the need to respect and honor the process, procedures, and operation workflows. I learned that sales is not the king—cash is king—and that risk management and cash flow management are crucial for a company's success. A company's revenue should not depend on a single salesperson, highlighting the importance of risk control and diversification.

WHAT ROLE DO YOU SEE DATA ANALYTICS PLAYING IN THE FUTURE OF COMMERCIAL CONSULTANCY?



Data-driven decision making: Data analytics enables commercial consultants to make informed and data-driven decisions. By analysing vast amounts of data, consultants can identify trends, patterns, and insights that can inform strategic planning, market research, and investment decisions. This helps businesses optimize their operations, mitigate risks, and seize opportunities based on evidence rather than intuition.

Enhanced client insights: Data analytics empowers commercial consultants to gain deeper insights into their clients' businesses. By analysing client data, consultants can identify areas for improvement, uncover inefficiencies, and provide tailored recommendations to enhance their clients' performance. This not only strengthens the client-consultant relationship but also demonstrates the value of data-driven consultancy services.

Predictive modelling and forecasting: Data analytics enables commercial consultants to develop predictive models and forecasting techniques. By leveraging historical data, market trends, and industry insights, consultants can help businesses anticipate market changes, customer behaviour, and emerging opportunities. This helps clients make proactive decisions and stay ahead of the competition in a fast-paced business environment.

Performance measurement and evaluation: Data analytics provides powerful tools to measure and evaluate the performance of commercial consultancy projects. Consultants can track key performance indicators, monitor project milestones, and assess the impact of their recommendations on clients' businesses. This data-driven evaluation helps consultants refine their strategies, identify areas for improvement, and demonstrate the value they bring to their clients.

Process optimization and automation: Data analytics can optimize and automate commercial consultancy processes. By analysing workflows and identifying bottlenecks, consultants can streamline their operations, reduce manual efforts, and improve overall efficiency. Automation tools can be employed for data collection, analysis, and reporting, freeing up consultants' time to focus on higher-value activities such as strategy development and client engagement.



A professional portrait of a man with dark hair and glasses, wearing a blue and white striped cardigan over a light blue button-down shirt. He is standing with his arms crossed against a dark, textured background.

FUTURE

Market intelligence and competitive analysis: Data analytics provides access to valuable market intelligence and competitive analysis. Consultants can leverage data from various sources, including social media, customer surveys, and industry reports, to gain insights into market trends, customer preferences, and competitor strategies. This information helps consultants provide clients with a competitive edge and identify untapped market opportunities.

Risk assessment and fraud detection: Data analytics can assist commercial consultants in assessing risks and detecting potential fraud. By analysing financial data, transaction records, and other relevant information, consultants can identify anomalies, patterns of fraudulent behaviour, or potential risks that may impact their clients' businesses. This proactive approach helps clients mitigate risks and protect their interests.

Personalized and targeted marketing: Data analytics allows commercial consultants to personalize and target their marketing efforts. By analysing client data, consultants can segment their client base, understand their preferences, and tailor their marketing messages accordingly. This targeted approach enhances marketing efficiency, improves client engagement, and increases the chances of acquiring new clients.

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ASIA CEO COMMUNITY IS A PROFESSIONAL NETWORK FOR BUSINESS LEADERS AND EXECUTIVES IN THE ASIA-PACIFIC REGION. THE COMMUNITY PROVIDES A PLATFORM FOR MEMBERS TO CONNECT, NETWORK, AND EXCHANGE IDEAS AND INFORMATION ABOUT BUSINESS IN ASIA.

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