

Partners in Best Practice

# Collaboration Skills Mastery and Alliance Best Practices

*Enhance your collaborative business  
management skills and advance your career*



Phoenix Consulting Group  
PARTNER DEVELOPMENT

2011

## Collaborative Skills Mastery and Alliance Best Practices

In today's hypercompetitive environment, organizations are becoming increasingly dependent on business collaboration to compete successfully - creating new value networks, tapping into new sources of innovation, and driving growth through strategic partnerships. Organizations need to ensure they can deliver on their strategic objectives by leveraging high performing collaborative partnerships and alliances. The skills required to manage these complex collaborative relationships have now become critical value-creating competencies. Executives need to be confident in an individual's collaborative business skills mastery, and collaborative business professionals need to be able to demonstrate their knowledge and capabilities against internationally recognized standards and global best practices.

**Phoenix Consulting Group offers Collaborative Skills Mastery and Alliance Best Practice education in a number of modular, workshop formats to meet your needs. We tailor the content and length of the workshops to accommodate the skill level of your professionals and their busy schedules.**

These workshops focus on team problem solving within the context of case study scenarios, simulating the situations partnering professionals face every day and challenging participants to apply their knowledge. Participants will also receive many tools and references to help augment their learning experience and to aid in putting alliance management best practices to work.

*"All in all this was one of the most useful professional development sessions I have participated in. It addressed business issues and challenges key to my current business. Well done by all. I now have the tools to use to prepare and evaluate an alliance."*

**The Skills Mastery Workshops are designed to help partner managers review their knowledge and hone their skills. They are also designed to prepare alliance managers for professional certification.** The course agenda is based on the skills and competencies determined by the Association of Strategic Alliance Professionals (ASAP) as critical to the success of collaborative business relationships. These competencies are reflected in the certification exam specifications and are tested in the *Certification of Achievement – Alliance Manager (CA-AM)* and *Certified Strategic Alliance Professional (CSAP)* certification. These exams do not just test for knowledge – they also test the ability to apply best practices and principles to collaborative situations and to choose the best course of action in resolving a difficult situation. Our workshops are designed to exercise your skills and increase your confidence in attaining these valuable credentials.

*“I wanted you to know that I just completed the CA-AM test and passed it. Yahoo! I had reviewed the workshop material today since some time had passed from our November workshop. I found the scenarios and info exceptionally helpful in preparing for the test. Thank you for your expert preparation and presentation of the material. It is all top notch.”*

## Who should attend - partner managers and executives who wish to:

- Sharpen their skills and competencies
- Deliver higher performing alliances
- Create corporate value through collaboration
- Enhance their understanding of alliance management best practices
- Prepare for the CA-AM or CSAP Exam, and
- Invest in their careers

### What others found valuable about this course:

- "Hearing other people's perspectives and experiences is always helpful."
- "Allowed me to know what I know (or don't know)."
- "The real scenarios and discussions were great."
- "Understanding best answer vs. the right answer."
- "Very comprehensive and based on real world stuff."
- "Group discussion and debate!"

### How course participants will benefit:

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- Learn best practices, tools and models that participants can directly apply to their work of managing partners for immediate improvement in alliance performance
- Engage in experiential learning by focusing on the application of skills and knowledge in case scenario class exercises
- Adopt a common vocabulary through a glossary of terms as used in the professional certifications for Alliance Management
- Assess skills and knowledge and identify gaps through a self-assessment tool
- Integrate your specific partnering experience through discussion and application of workshop learnings
- Prepare for the ASAP professional certification exams

### At the end of the course, participants will be able to:

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- Align alliance strategy with corporate strategies and objectives
- Devise a partner selection criteria model ensuring strategic fit, ability to execute, and creation of value in the partnership
- Create mission statements, value propositions and define scope of an alliance
- Bridge cultural differences through operating principles and shared values
- Structure governance and metrics appropriate to the partnership
- Build trust and stakeholder alignment
- Engage in value creating negotiations
- Understand formal and informal conflict and dispute resolution techniques
- Foster collaborative capability within the organization

## Tools provided:

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**Self-Assessment** - The skills inventory tool will aid you in determining where your strengths, weaknesses and gaps are in alliance management competencies.

**Glossary of Terms** – Commonly used terms in alliance management defined as they are used in the Detailed Content Specification for the certification exams.

**Study Resources** – A compendium of resources, white papers, and readings available through PhoenixCG and through the ASAP member library which can augment your workshop learning.

**Scenarios**- The course is built around experiential scenario learning. We will review concepts and tools but much of the learning comes from interaction with your teammates in solving the issues presented in these five scenarios. Scenarios represent multiple industry examples, but the principles are applicable across all industries and alliance types. This gives the participants exposure to the kind of situational challenges they will encounter on the job.

**Certification Prep Guide** – An overview of the certification process, what to expect, and how to prepare. We answer many frequently asked questions.

**Sample Questions and Practice Exam** – Certification candidates can test their skills and become familiar with the types of questions they will encounter on the exams.

**Worksheets and Templates**- Many tools are provided within the workshop materials. For example a Peer Mapping template that can be applied to your current alliances.

## Skills Mastery Workshop Formats

**Alliance Fundamentals** covers the alliance **management skills to manage an ongoing alliance**. Course content covers those skills that are tested in the ASAP Certification of Achievement – Alliance Management (CA-AM) Exam. We offer this course in a number of formats depending upon the readiness of the alliance team: full-day on-site workshop (recommended for highest value); accelerated half-day on-site workshop; and 2-session on-line webinar. The same content is covered in each format. The difference is in the degree of group learning and practical application of the skills in class exercises.

**Advanced Skills** covers the full lifecycle of alliance management and in particular the **advanced skills including alliance strategy, partner selection, and fostering collaborative capability**. This course covers skills which are incremental to those covered in the Fundamentals Workshop and is geared to the senior alliance manager. Course content is appropriate to those alliance managers seeking the ASAP Certified Strategic Alliance Professional (CSAP) credential. This course is offered in both full-day and half-day on-site formats. We do not recommend web delivery of this course due to the complexity of the material.

### Alliance Fundamentals Day Agenda

9:00	Welcome and Introductions Certification Overview (CA-AM) <i>Sample Test</i>
10:00	Strategic Alignment <i>Scenario Exercise 1</i> Bridging Cultures and Values <i>Scenario Exercise 2</i> Governance Tools & Techniques <i>Scenario Exercise 3</i>
Noon	Mid-day Break
1:00	Organizational Commitment and Metrics <i>Scenario Exercise 4</i> Alliance Operation <i>Scenario Exercise 5</i> Transition and Termination <i>Scenario Exercise 6</i>
4:00	Wrap up and Takeaways

### Alliance Advanced Skills Day Agenda

9:00	Welcome and Introductions Certification Overview (CSAP) <i>Sample Test</i>
10:00	Alliance Strategy <i>Scenario Exercise 1</i> Partner Selection and Qualification <i>Scenario Exercise 2</i>
Noon	Mid-day Break
1:00	Negotiating Partner Agreements <i>Scenario Exercise 3</i> Portfolio Management <i>Scenario Exercise 4</i> Collaborative Capability <i>Scenario Exercise 5</i>
4:00	Wrap up and Takeaways

**Customized Skills Mastery Workshop** covers the breadth of skills of managing collaborative business relationships across the partner lifecycle. The two-day format enables rich discussion of the application of best practices within the context of your organization's strategic relationships. This course is ideal for the organization that wants to cover the **full breadth of alliance lifecycle skills augmented with custom workshop exercises** that will focus on your specific alliance challenges.

### Day 1 Customized Agenda

**9:00** Welcome and Introductions  
 Alliance Strategy  
*Scenario Exercise 1*  
*Custom Exercise: Strategic Alignment*  
 Partner Selection and Qualification  
*Scenario Exercise 2*  
*Custom Exercise: Partner Selection Criteria and Qualification*

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**Noon** Mid-Day Break

**1:00** Value Prop  
*Scenario Exercise 3*  
*Custom Exercise: Alliance Charter*  
 Bridging Cultures/Values  
*Scenario Exercise 4*  
*Custom Exercise: Operating Principles*  
 Governance Tools & Techniques  
*Scenario Exercise 5*  
*Custom Exercise: Peer Mapping*

**5:00** Wrap up and Takeaways

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### Day 2 Customized Agenda

**9:00** Welcome and Review  
 Alliance Launch and Implementation  
*Scenarios Exercise 6*  
*Custom Exercise: Stakeholder Alignment*  
 Negotiating Partner Agreements  
*Scenario Exercise 7*  
*Custom Exercise: Business and Planning*  
 Portfolio Management and Co-opetition

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**Noon** Mid-Day Break

**1:00** *Scenario Exercise 8*  
*Custom Exercise: Managing Co-opetition*  
 Alliances in Transition  
*Scenario Exercise 9*  
 Collaborative Capability  
*Scenario Exercise 10*  
*Custom Exercise: Fostering Collaborative Culture*  
 Exam Review

**5:00** Wrap up and Takeaways

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**Lifecycle Modules** drill deeper into one aspect of alliance management and include additional theory, tools and class exercises to provide a more thorough understanding of the application of the subject matter. More time is allowed for participants to ‘workshop’ their specific alliance challenges so at the end of the session, they take away not just learning but a template for action. These modules can be delivered stand-alone or as add-in modules. They can also be delivered in webinar format, covering theory and principles upon request.

## Lifecycle Modules

Module	Audience	Learning Objectives
<b>Alliance Strategy</b>	Senior Executives & Senior Alliance Management	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Profile benefits and tradeoffs in Build, Buy, Partner decisions</li> <li>- Identify partner requirements across product adoption curve.</li> <li>- Choose the appropriate alliance business model</li> <li>- Understand the benefits of partnering</li> <li>- Gain strategic alignment and synergy with partner capabilities.</li> <li>- Fostering a partner friendly culture.</li> </ul>
<b>Partner Selection &amp; Qualification</b>	Senior Executives & Senior Alliance Management	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Qualify partners for strategic value and ability to execute</li> <li>- Develop qualification criteria</li> <li>- Quantify anticipated alliance value</li> <li>- Perform due diligence</li> </ul>
<b>Collaborative Innovation and Value Creation</b>	Alliance Practitioners of all Levels	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Leveraging collaborative innovation to create alliance value</li> <li>- Identify sources of Innovation to create value</li> <li>- Define joint solutions that create differentiated/strategic value</li> <li>- Measure and optimize solution value proposition to customer and partners</li> <li>- Create a project plan to create value and deliver benefit</li> </ul>
<b>Joint Business Planning</b>	Alliance Practitioners of all Levels	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Determine relevant components for an alliance business plan</li> <li>- Build a business plan that delivers on the alliance strategy and objectives</li> <li>- Assess ROI and business impact</li> <li>- Apply tools for operational management</li> </ul>
<b>Value Creating Negotiations</b>	Alliance Practitioners of all Levels	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Design effective agreements</li> <li>- Set up positive outcomes</li> <li>- Create sustainable value</li> </ul>
<b>Scorecards &amp; Metrics</b>	Alliance Practitioners of all Levels	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Measure value created by an alliance in multiple dimensions</li> <li>- Capture the full value of your alliance</li> <li>- Create metrics to optimization of alliance performance</li> <li>- Measure partner health</li> </ul>

<b>Governance</b>	Alliance Practitioners of all Levels	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Choose and implement an effective alliance governance model</li> <li>- Balance Trust vs. Control in governance model</li> <li>- Understand the elements of managing risk in performance</li> <li>- Establish governance cadence</li> <li>- Establish roles, responsibilities, decision making authority</li> <li>- Develop escalation process and policy</li> </ul>
<b>Building Stakeholder Alignment</b>	Alliance Practitioners of all Levels	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Identify key stakeholders motivations/incentives</li> <li>- Strategies for hostages and cheerleaders</li> <li>- Gain stakeholder buy-in to alliance objectives</li> </ul>
<b>Active Executive Sponsorship</b>	Alliance Practitioners of all Levels	<b>Learning Objectives</b> <ul style="list-style-type: none"> <li>- Recruit effective Executive Sponsors</li> <li>- Set expectations for participation</li> <li>- Keep Executive Sponsors informed and engaged</li> <li>- Escalating effectively</li> </ul>
<b>Managing Co-opetition</b>	Alliance Practitioners of all Levels	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Identify when a co-opetition relationship is warranted</li> <li>- Manage critical success factors</li> <li>- Protect IP and information flow</li> <li>- Build trust and cooperation</li> <li>- Establish rules of engagement</li> </ul>
<b>Collaborative Marketing</b>	Alliance Practitioners of all Levels	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Going to market with a partner</li> <li>- Joint messaging and branding</li> <li>- Creating opportunities and leads</li> </ul>
<b>Collaborative Selling for Partner Managers</b>	Alliance Practitioners of all Levels	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Conduct joint account mapping and targeting exercise</li> <li>- Lead joint account planning</li> <li>- Establish joint pipeline management</li> <li>- Collaborate on Rules of Engagement</li> <li>- Manage effective escalations</li> </ul>
<b>Collaborative Selling for Sales</b>	Sales Professionals who work with Partners	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Understanding Win/win/win</li> <li>- Joint account targeting</li> <li>- Joint account planning</li> <li>- Joint pipeline management</li> <li>- Rules of Engagement</li> </ul>
<b>Portfolio/Ecosystem Management</b>	Senior Executives & Senior Alliance Management	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Portfolio Topographies</li> <li>- Designing the ecosystem around the customers</li> <li>- Governance and metrics for ecosystems</li> </ul>
<b>Fostering Collaborative Capability</b>	Senior Executives & Senior Alliance Management	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Communicating Alliance Best Practices</li> <li>- Alignment of alliance success and stakeholder interests</li> <li>- Culture for collaboration</li> </ul>
<b>Alliance Management for Executives</b>	Senior Executives and Entrepreneurs	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Understand how to use alliances in growing your business</li> <li>- Profile benefits and trade-offs to build, buy, partner</li> <li>- Articulate partner value prop for your key partners</li> <li>- Guide and oversee strategic alignment</li> <li>- Model and mentor partner friendly behavior</li> </ul>

## Coaching Services

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Learning may begin in the classroom, but it is retained when the concepts are applied in the real world. Coaching helps to ensure that alliance managers have the support they need to apply what was gained in the class setting to their work situations.

### Individual Mentoring and Consultation

Hourly blocks of time are allocated for scheduled one on one mentoring and consultations with PhoenixCG Subject Matter Experts. PhoenixCG coaches are certified alliance professionals and all have many years of experience in managing collaborative relationships.

Individuals schedule time with PhoenixCG coaches on as needed basis, designating the topics for discussion on various alliance management issues. We will budget and track consultation time, topics, and reported results. We expect that for every consultation, there will also be a follow up call to assess what actions were taken, what worked, what didn't and what value was gain as a result.

### Group Alliance Skills Mastery Coaching

Group coaching enables the entire alliance team to work on specific issues and exercises and to compare results to capture the collective learning. We partner with the management team to determine the topics for coaching as described among the options in the table below. We hold an initial web conference with the team to set the stage and review the coaching process, introduce the coaching topics and assign the first homework exercise along with additional reference reading that may help the team gain further insight into topic. At the following group session the session participants share their work and engage in discussions about challenges, solutions, and lessons learned.

## Potential Coaching Topics

Topic	Outcomes
Alliance Value Propositions	Value propositions which articulate the benefit of the partnership for the customer and for each of the partners.
Governance Cadence	Rhythm of review meetings, agenda, and key participants required to make decisions and maintain expected performance
Metrics Scorecard	Measuring alliance effectiveness and performance in four quadrants: strategy, financials, operations, and relationship
Joint Account Planning	Collaborative completion of a joint account plan to manage a joint sales campaign
Rules of Engagement	Addresses scope of the alliance in the sales engagement, transaction model (sell to, with, and thru), who leads, and when to escalate
Internal Stakeholder Alignment	Identifying who is aligned, who is not. Clarifying the interests of stakeholders and addressing how alliance performance reinforces stakeholder accountability or detracts. Strategies to encourage alignment.
Peer Mapping	Mapping functional peers across the alliance in terms of responsibilities and equivalent authority in decision making.
Escalation Model	Creating an escalation model and cadence for escalation to address function decision making. Note: peer mapping must precede this.
Managing Co-opetition	Identifying where you compete with your partner and where you collaborate. Communicating to internal stakeholders. Agreeing to rules of engagement and accepted behavior.
Sales Coverage/Mapping	Mapping accounts and sales teams between partners. Initiating the engagement between teams.
Joint Business Planning	May require more than one session due to the depth of the process. Participants complete a business plan template addressing resources required to execute and revenue anticipated as a result.
Other	Customized as needed

# Partners in Best Practice

## About our Instructors:

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PhoenixCG instructors are certified at the highest credential of the profession, *Certified Strategic Alliance Professional (CSAP)* and most have served on the ASAP Standards Advisory Board, the body responsible for developing the certification exams. PhoenixCG has instructors located in the United States, in the Netherlands, United Kingdom, and France.

## Partial List of Corporate Clients:

- APC-Schneider
- BioRad
- BMC
- Cisco
- Lilly
- Microsoft
- Panduit
- Pearson Learning
- Xerox



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## Professional Development Practice

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Phoenix Consulting Group has trained 1000's of alliance managers from over 60 different companies from Asia, Europe and United States. We offer a comprehensive training and skills mastery program to enable your team to achieve greater partnering performance.

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