

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

Collaborative Skills Mastery and Alliance 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.

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



Phoenix Consulting Group is the premier provider of certification preparatory education. PhoenixCG has been preparing alliance managers for certification since 2007 when the CA-AM credential was first introduced. We were the first to develop certification education and have been selected by ASAP to provide preparatory workshop to its members every year since certification was launched.

Organizations such as Capgemini, Cisco, IBM, Microsoft, Johnson & Johnson, Lilly, SAS, Schneider Electric, and Xerox have chosen PhoenixCG to train their alliance teams and prepare them for certification.

We are honored that the Alliance Skills Mastery Workshops were the first to be approved in ASAP's Education Partner Provider Program, through our partner in the Netherlands. We have recently refreshed the materials to reflect the latest in content and best practices as represented in the newly released *ASAP Handbook of Alliance Management*.

"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 agendas are 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.

Who should attend - partner managers and executives who aspire 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

“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.”

What other's 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."
- "Verv comprehensive and based on real world stuff."

How course participants will benefit:

- 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 workshop participants will be able to:

- 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

Thank you for sharing your insight into governance best practices. I know there is a common feeling of herding cats in the alliances realm and we all need to all take the time to get grounded in what the best practices are. Your presentation was interesting, to the point and spot on as to the challenges we all face in making governance happen in a productive manner.

Tools provided:

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 Outline 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 workshop 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 the 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.

2013 Alliance Best Practice Research – Conducted in collaboration with the Association of Strategic Professionals, we delved into what practices separated the top 20% of high performing alliances from the rest in creating corporate value.

Skills Mastery Workshop Formats

Alliance Fundamentals covers the alliance **management skills to manage an ongoing alliance**. This full day workshop covers those skills that are tested in the ASAP Certification of Achievement – Alliance Management (CA-AM) Exam. Key skills covered are launching and managing an alliance, governance, metrics and organizational alignment.

Time to take the CA-AM exam will be provided at the end of class for those wishing to earn their certification on the spot.

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.

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 <i>Scenario Exercise 4</i> Alliance Metrics <i>Scenario Exercise 5</i> Collaborative Selling <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> Transformation & Termination <i>Scenario Exercise 5</i> Collaborative Capability <i>Scenario Exercise 6</i>
4:00	Wrap up and Takeaways

Separate registration is required for the certification exams. Go to www.strategic-alliances.org/certification or contact Jennifer Silver jsilver@strategic-alliances.org for more information and to register for the exams.

Lifecycle Modules

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 upon request, covering theory and principles.

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

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

Coaching Services

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

About Our Instructors

PhoenixCG Instructors are certified at the CSAP level, the highest credential of the alliance profession and can each draw upon years of alliance management practice. Each has served on the ASAP task group that created the certifications, serving to write questions and vet them for inclusion in the examinations.



NORMA WATENPAUGH, CSAP

Founding Principal, Phoenix Consulting Group

Best Practices Committee Chair, Association of Strategic Alliance Professionals

Norma Watenpaugh is the founding principal of Phoenix Consulting Group (www.phoenixcg.com) which provides partnering and marketing consulting services with expertise in partner strategy, alliance management and program development. Prominent clients include Adobe Systems, Cisco Systems, Dupont, Lilly, PayPal, Microsoft, SAP, and UPS.

Her twenty-five years of professional experience includes executive positions architecting multi-channel and alliance partner programs at Sun Microsystems, Amdahl Corp and BEA Systems. At BEA, Norma repositioned the company's business strategy to embrace a partnering model. Additionally, she launched the acclaimed Star Partner Program to consolidate all partner relationships into a single, manageable, scalable, world-wide program, impacting 70% of the company's revenue of \$1 billion.

Norma has taught alliance seminars for Duke Corporate Education, the Reuters Foundation, Digital Vision Fellowship Program at Stanford University, San Jose State University Professional Development, the American Management Association, and is a frequently requested speaker at industry events.

Norma has been a Global Board member of the Association of Strategic Alliance Professionals since 2003. As former Best Practices Committee Chair (2003-2012), she has led the organization in developing the CA-AM and CSAP certifications. She has most recently led the effort revitalize the body of knowledge of alliance best practices resulting in the release of the *ASAP Handbook of Alliance Management: A Practitioner's Guide*.



JOHN PARKER, CSAP

UK Professional Development Lead, Phoenix Consulting Group

UK Chapter President, Association of Strategic Alliance Professionals

John is a consultant and trainer in business collaboration with a focus on BS 11000 for company certification and ASAP certification for individual alliance and relationship managers. His career focused on the application of IT for business value for users and in sales & marketing for ICL, now Fujitsu Services. As IT companies moved away from full service and product supply and towards specialization, collaboration and alliances, John helped develop strategy to exploit this new business model and over the last 30 years has developed and managed alliances, helped in the development of BS 11000, ASAP Best Practice and Certification exams.

John has an HNC in Business Studies from Leeds Metropolitan University and Diploma in Management Studies from Westminster University.



ANN TRAMPAS, CSAP

Professional Development Lead, Phoenix Consulting Group

Midwest Chapter President and Professional Development Committee, Association of Strategic Alliance Professionals

Ann Trampas is an Adjunct Professor of Marketing at the Keller Graduate School of Business as well as Faculty for the American Management Association and formerly the Certification Program Director for the Association of Strategic Alliance Professionals. Ms. Trampas prior corporate experience includes Vice President of Global Alliances for SPSS, where she developed the alliance strategy and led a team of Alliance Managers responsible for relationships with system integrators, consulting firms and technology partners. Prior to that, she held management positions with BCE as Vice President of Partner Marketing –Teleglobe and Director of Sales – Nortel. Her consulting background includes Cap Gemini in both the CRM and Telecommunications Practices where she program managed major product launches and developed a marketing solution set. She also built the sales process improvement methodology and led channel strategy efforts for a Siebel implementation partner.

Ann is a frequent speaker at workshops on Alliances. B.S. Marketing (Honors) – University of Illinois and MBA Loyola University.

Partners in Best Practice

About our Instructors:

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:

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



Professional Development Practice

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.