

Partners in Best Practice

# Partnering Excellence

*A New Format for Learning and Embedding Best Practices into your Business*



**Phoenix Consulting Group**

## Embracing Partnering Excellence

**Phoenix Consulting Group offers a breakthrough model for professional development.** We combine education in the best practices of partner management with practical application and peer review. This process goes beyond a training event and results in fine tuning your partnering process to embrace and embed best practices into your business. Unlike other training programs this format is designed to have an immediate and lasting impact on the performance of your partnering organization.

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 collaboration skills education.**

PhoenixCG has been preparing alliance managers for certification since 2007 when credentialing was first introduced in the profession. We were the first to develop certification education and have been selected by organizations such as Capgemini, Cisco, IBM, Intel, Microsoft, Johnson & Johnson, Lilly, SAS, Schneider Electric, and Xerox to train their partner management teams to achieve partnering excellence.

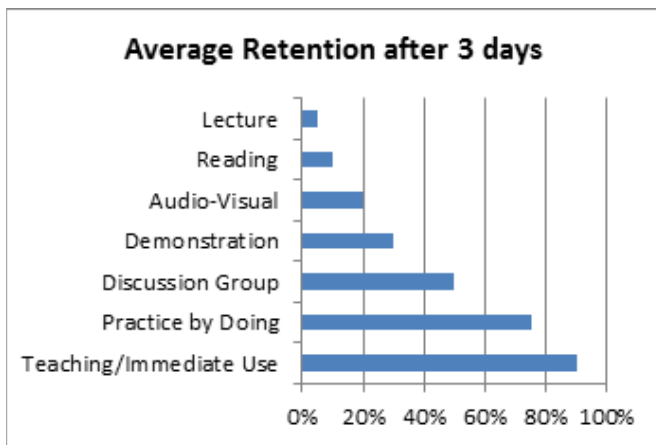
The materials within these training modules have been updated to reflect the competencies needed to conform to the International Standard ISO 44001 Collaborative Business Relationship Management Framework.



*"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 Format

PhoenixCG has developed a new format for professional development that is much more effective than traditional training. Traditional training has a half-life. After three days you've forgotten half of what you heard in class.



We have employed all of the proven learning retention strategies that ensure that partner managers not only retain learning but apply the learning to their work. Your partner team can achieve high performing results by embedding best practices in your partnering processes: such as value proposition development, governance, metrics, stakeholder alignment, business planning and joint account planning.

The format is structured through a series of activities to ensure learning is retained and best practices are embedded in your partnering organization. Prior to the first session, pre-reading and exercise templates are distributed to participants to heighten their awareness of the subject matter and to prepare them to learn.

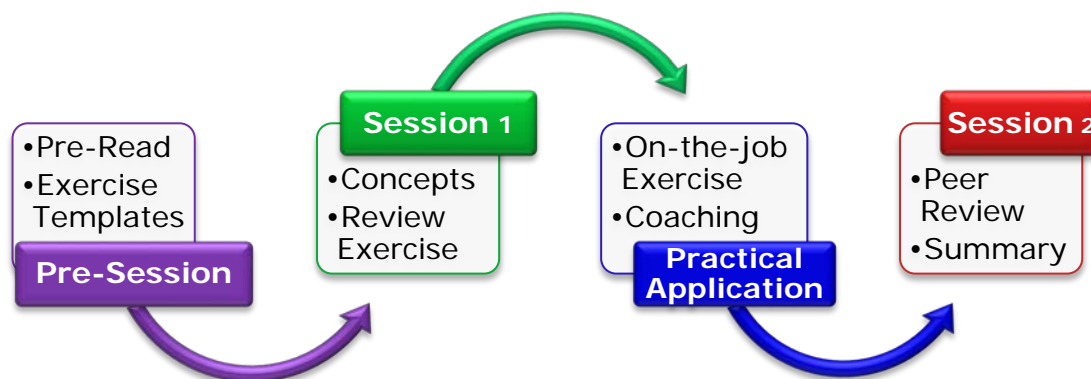
At the first session, PhoenixCG instructors lead the participants through the concepts and case examples of best practices, fostering active discussion and debate. Next, the templates and worksheets for on-the-job homework exercise are reviewed, ensuring participants know how to apply them.

The team is given a few weeks to apply the lessons, complete the exercise and encouraged to involve their partner. During this time, PhoenixCG instructors will be available to coach and mentor the partner managers as needed to complete the exercise.

At the follow-on session, each participant will share their work and discuss challenges, solutions, and lessons learned. PhoenixCG instructors facilitate by highlighting best practices and providing ongoing coaching on the practicalities of implementation.

Finally, we summarize the best practices of the team, supporting your organization's adoption of what works best for you.

## The Process Flow



## Benefits of the Experience:

Some of the unique benefits that are realized from this integrated approach are:

- Immediate impact on the management of existing partners, accelerating business results.
- Creation of a continuous learning environment, rather than a training event
- Collaboration within the partner team, leading to greater efficiency and effectiveness
- Embedded best practices into the business processes of partner management
- A community of practice to share successes and to promote group problem solving
- An expanding institutional body of knowledge of partner management

*“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.”*

## Partnering Excellence Modules

Each module drills deep into one aspect of partner management and includes theory, tools and exercises to provide a more thorough understanding of the application of the subject matter. Participants take away not just learning but a template for action. These modules can be delivered on site or remotely through webinars.

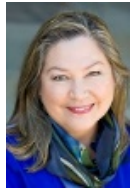
Module	Audience	Learning Objectives
<b>Partner Strategy</b>	Senior Executives & Senior Partner Management	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Profile benefits and tradeoffs in Build, Buy, Partner decisions</li> <li>- Identify partner requirements across product adoption curve</li> <li>- Choose the appropriate partner business model: alliance, channel, OEM, etc.</li> <li>- Gain strategic alignment and synergy with partner capabilities</li> </ul>
<b>Partner Selection &amp; Qualification</b>	Senior Executives & Partner Managers of all Levels	<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 partnering value</li> <li>- Perform due diligence</li> </ul>
<b>Collaborative Innovation and Value Creation</b>	Partner Managers of all Levels	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Leveraging collaborative innovation to create partner 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 value for customer and partners</li> <li>- Create a project plan to create value and deliver benefit</li> </ul>
<b>Joint Business Planning</b>	Partner Managers of all Levels	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Determine relevant components for a joint business plan</li> <li>- Build a business plan that delivers on strategy and objectives</li> <li>- Assess ROI and business impact</li> <li>- Apply tools for operational execution</li> </ul>
<b>Value Creating Negotiations</b>	Partner Managers of all Levels	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Creating the term sheet</li> <li>- Design effective agreements</li> <li>- Set up positive outcomes</li> <li>- Negotiating for sustainable value</li> </ul>
<b>Scorecards &amp; Metric</b>	Partner Managers of all Levels	<b>Learning Objectives:</b> <ul style="list-style-type: none"> <li>- Measure value created by partnering in multiple dimensions</li> <li>- Capture the full value of your collaboration</li> <li>- Create leading indicator metrics to optimize performance</li> <li>- Metrics to manage partner health to drive performance</li> </ul>

<b>Governance</b>	Alliance Practitioners of all Levels	<p><b>Learning Objectives:</b></p> <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	<p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>- Identify key stakeholder 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	<p><b>Learning Objectives</b></p> <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	<p><b>Learning Objectives:</b></p> <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	<p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>- Going to market with a partner</li> <li>- Blending messaging and branding</li> <li>- Creating opportunities and leads</li> <li>- Marketing tools to advance sales closure</li> </ul>
<b>Collaborative Selling for Partner Managers</b>	Alliance Practitioners of all Levels	<p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>- Selling the joint value proposition</li> <li>- How partner business models drive behavior</li> <li>- Sales engagement roles/responsibilities thru sales cycle</li> <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	<p><b>Learning Objectives:</b></p> <ul style="list-style-type: none"> <li>- Understanding Win/win/win</li> <li>- Selling the joint value proposition</li> <li>- How partner business models drive behavior</li> <li>- Sales engagement roles/responsibilities thru sales cycle</li> <li>- Joint account targeting</li> <li>- Joint account planning</li> <li>- Joint pipeline management</li> <li>- Rules of Engagement</li> </ul>

## About Our Instructors

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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**

**Board Member and former Best Practices Committee Chair, Association of Strategic Alliance Professionals**

Norma Watenpaugh is the founding principal of Phoenix Consulting Group ([www.phoenixcg.com](http://www.phoenixcg.com)) which provides partnering consulting and educational services with expertise in partner strategy, alliance management and partner ecosystem development., helping clients gain more value from their most important business relationships. Prominent clients include Adobe, Cisco Systems, Google, Dupont, Lilly, PayPal, Microsoft, SAP, and UPS.

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, she has led the organization in developing the CA-AM and CSAP certifications. She 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*, which is often referred to as the bible of alliance management. Most recently, Norma leads the US Delegation to the ISO committee for Collaborative Business Relationships. She has been named a Silicon Valley Woman of Influence and a Forbes Business Council member.



**ANN TRAMPAS, CSAP**

**Professional Development Lead, Phoenix Consulting Group**

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

Ann Trampas is a Lecturer at the University of Illinois – Chicago in the College of Business Administration 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:

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PhoenixCG instructors are certified at the highest credential of the profession, *Certified Strategic Alliance Professional (CSAP)* and 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
- Amazon
- BioRad
- Cisco
- Google
- IBM
- Lilly
- Microsoft
- Nationwide
- PayPal
- Pearson Learning
- SAP
- Xerox



**Phoenix Consulting Group**

## Professional Development Practice

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Phoenix Consulting Group has trained 1000's of partner managers from over 60 different companies from Asia, Europe, Latin America 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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