Collaborative Skills Mastery and Partnering Best Practices

Enhance your collaborative business skills and Boost the ROI on your strategic relationships

Phoenix Consulting Group

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Phoenix Consulting Group offers Collaborative Skills Mastery and Partnering 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, including options for remote delivery.

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 ecosystems. The skills required to manage these complex collaborative relationships have now become critical value-creating competencies.

Phoenix Consulting Group is the premier provider of collaborative skills education. PhoenixCG has been training partnering managers since 2002. We were the first to develop certification education and have trained thousands of partner managers for organizations such as Capgemini, Cisco, IBM, Microsoft, Johnson & Johnson, Lilly, SAS, Schneider Electric, and Xerox.

We continuously refresh the materials to reflect the latest in content and best practices as represented in the *ASAP Handbook of Alliance Management* and the competencies recommended in the ISO-44001 Collaborative Business Relationship Management Standard.

"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."

Julie Alexander, Alliances - Pearson Education

The Skills Mastery Workshops are designed to help partner managers assess their knowledge and hone their skills. 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 incorporated 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 skills also reflect the collaborative competencies outlined in the ISO-44001 Collaborative Business Relationship Management Standard.

More than Exam Preparation. Unlike other typical certification preparation courses, ours are designed to develop the skills to apply best practices and principles to collaborative situations and to choose the best course of action in resolving difficult situations.

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
- Prepare their organization for ISO Certification

"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 others found valuable about this course:

- "Hearing other people's perspectives and experiences is always helpful."
- "The real scenarios and discussions were great.""
- "Very comprehensive and based on real world stuff."
- "Group discussion and debate!"

How course participants will benefit:

- Learn best practices, tools and models that participants can directly apply to their work of managing partners, realizing immediate improvement in alliance performance
- Engage in experiential learning by applying the skills and knowledge in scenarios and other class exercises
- Adopt the common vocabulary of alliance professionals through understanding the glossary of terms 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 resource center which can augment your workshop learning.

Scenarios- The workshops are 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.

Sample Questions and Practice Exam – Learners can test their skills and become familiar with the types of questions they will encounter on the exams if they choose to certify.

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

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

Operating an Alliance covers the alliance **skills to manage an ongoing alliance.** This 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.

Format: Instructor-led, half-day or full day on site OR Five 1-hr webinar sessions.

Alliance Fundamentals Day Agenda	
9:00	Welcome and Introductions Certification Overview (CA-AM) *Sample Test*
10:00	Strategic Alignment *Scenario Exercise 1* Bridging Cultures and Values *Scenario Exercise 2* Governance Tools & Techniques *Scenario Exercise 3*
Noon	Mid-day Break
1:00	Organizational Commitment *Scenario Exercise 4* Alliance Metrics *Scenario Exercise 5* Collaborative Selling *Scenario Exercise 6*
4:00	Wrap up and Takeaways

Advanced Skills covers the full lifecycle of collaboration management and in particular the **advanced skills including strategy, partner selection, and fostering collaborative capability**. This course covers skills which are incremental to those covered in the Operating Workshop and is geared to the senior partner manager. Course content is appropriate to those managers seeking the ASAP Certified Strategic Alliance Professional (CSAP) credential.

Format: Instructor-led, half-day or full day on site OR Five 1-hr webinar sessions.

Alliance Advanced Skills Day Agenda	
9:00	Welcome and Introductions Certification Overview (CSAP) *Sample Test*
10:00	Alliance Strategy *Scenario Exercise 1* Partner Selection and Qualification *Scenario Exercise 2*
Noon	Mid-day Break
1:00	Negotiating Partner Agreements *Scenario Exercise 3* Portfolio Management *Scenario Exercise 4* Transformation & Termination *Scenario Exercise 5* Collaborative Capability *Scenario Exercise 6*
4:00	Wrap up and Takeaways

Lifecycle Modules

Lifecyle 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.

Our Embedding Excellence format enables both concept education and skills development by joining a webinar to review concepts, followed by a practical application exercise, specific to the attendees situation, and lastly a peer review to share best practices and challenges. This is the highest value in learning formats, since it is designed for long-term retention and embedding the practices into your alliance management business processes.

Alliance Management and Operations
(Aligned to skills tested in CA-AM)

Module	Descriptions	Learning Objectives
Alliance Lifecycle Fundamentals	Overview of 'why' partner, different types of partnering models and the fundamentals of the alliance lifecycle.	**Learning Objectives:** - Review types of partnerships - Identify benefits of partnering - Understand the stages of alliance lifecycle
Value Propositions for Partnering	Creating compelling value propositions which articulate the benefit of the partnership for the customer and for each of the partners.	**Learning Objectives:** - Define a strong customer value prop to drive revenue – **compelling reason to buy** - Understand how a partner's business model creates a partner value prop – **compelling reason to partner** - Address the value prop for motivating joint/channel sales engagement – **compelling reason to sell**
Value Creating Negotiations	Learn to create effective agreements, focus on positive outcomes and build trust.	**Learning Objectives:** - Creating the term sheet - Design effective agreements - Set up positive outcomes - Negotiating for sustainable value
Building Stakeholder Alignment	Identifying who is aligned, who is not. Clarifying the interests of stakeholders and accountability. Strategies to encourage alignment	**Learning Objectives:** - Identify key stakeholder motivations - Utilize tools to manage alignment - Gain stakeholder buy-in to alliance objectives

Module	Descriptions	Learning Objectives
Governance	Governance is a system of managing performance. It includes a cadence of review meetings, agendas, and key participants required to make decisions and attain expected performance.	**Learning Objectives:** - Choose and implement an effective alliance governance model - Balance Trust vs. Control - Managing risk in performance - Define roles, responsibilities, decision making authority - Develop escalation process and policy
Active Executive Sponsorship	Sponsorship helps keep the partnership on track strategically, removes barriers, and fosters collaborative behavior.	**Learning Objectives** - Recruit effective Executive Sponsors - Set expectations for participation - Keep Sponsors informed and engaged - Escalating effectively
Scorecards & Metric	Measuring alliance effectiveness and performance in four quadrants: strategy, financials, operations, and relationship to capture the full value you are creating.	**Learning Objectives:** - Capture the full value of your alliance in multiple dimensions - Measure leading indicator metrics to optimize performance - Manage partner health to drive performance

Go-to-Market Engagement
(Aligned to Information Technology and Communications Industry Specific Skills)

Module	Descriptions	Learning Objectives
Joint Business Planning	A key success factor for alliances ensuring that both organizations have clear expectations on the plan of action. A review of best practices and what components go into a business plan, how to build a business case and writing the executive summary.	**Learning Objectives:** - Determine relevant components for a joint business plan - Build a business plan that delivers on strategy and objectives - Assess ROI and business impact - Apply tools for operational execution
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.	**Learning Objectives:** - 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
Go to Market Planning	How to develop GTM strategy, the preparation and tools needed to build customer awareness and demand and enable sales engagement	**Learning Objectives:** - Going to market with a partner - Blending messaging and branding - Creating opportunities and leads

Module	Descriptions	Learning Objectives
		- Marketing tools to advance sales closure
Joint Account Planning	Collaborative creation of a joint account plan to manage a customer sales campaign. Addresses scope of the alliance in the sales engagement, transaction model, who leads, and when to escalate.	**Learning Objectives:** - Qualify a joint opportunity - Profile account players, roles, decision criteria - Develop a joint sales 30/60/90 day action plan - Establish accountably
Collaborative Selling for Partner Managers	Joint selling is the last mile and perhaps the toughest mile in managing alliances. If this phase is not successful, then neither is the alliance.	**Learning Objectives:** - Selling the joint value proposition - Collaborate on Rules of Engagement - Sales engagement roles & responsibilities thru sales cycle - Establish joint pipeline management - Resolving conflicts

Advanced Collaboration Skills

(Aligned to skills tested in CSAP + emerging competencies)

Module	Descriptions	Learning Objectives
Partner Strategy	There are many dimensions in why companies choose to partner as a strategy: to tap new sources of innovation, to grow new revenue streams and market reach, or to gain operational efficiencies and reduce risk. We will look at each of these strategies and to select the right partnering model.	**Learning Objectives:** - Profile benefits and tradeoffs in Build, Buy, Partner decisions - Identify partner requirements across product adoption curve - Choose the appropriate business model: alliance, channel, OEM, etc. - Gain strategic alignment and synergy with partner capabilities
Collaborative Innovation and Value Creation	Alliances are a natural incubator for collaborative innovation. We explore innovation across a spectrum of possibilities: *product innovation, operations innovation, and business model innovation* and how to translate innovation into value creation.	**Learning Objectives:** - Leveraging collaborative innovation to create partner value - Identify sources of innovation to create value - Define joint solutions that create differentiated/strategic value - Measure and optimize value for customer and partners
Partner Selection & Qualification	Qualifying the right partner can have an immense impact on the eventual success of a partnership. It is important to complete the due	**Learning Objectives:** - Qualify partners for strategic value and ability to execute - Develop qualification criteria

Module	Descriptions	Learning Objectives
	diligence and qualify partners according to strategic and operational capabilities.	- Quantify anticipated partnering value - Perform due diligence
Termination and Transformation	Some alliances come to a natural end; they have accomplished their objectives. Others come to a fiery end. Still others have the capacity to transform take on new futures.	**Learning Objectives:** - Assess whether an alliance requires action - Understand considerations for termination - Review elements of transformation -
Collaborative Capability	The ability to partner effectively is broader than two alliance managers getting along. How can you as a partner manager foster and mentor collaborative skills and mindset among your extended alliance team?	**Learning Objectives:** - Foster a collaborative mindset - Disseminate best practices among stakeholders - Model collaborative skills - Identify and address gaps
Agile Alliances	Agile alliances adopt the principles of agile methodology, establishing a Minimal Viable Partnership (MVP), breaking the partnering process into reiterative sprints, accelerating time to value and building on customer value in each cycle.	**Learning Objectives:** - Forming and launching alliances in a faster, more iterative, and customer-centric format - Values and Principles of Agile partnering - Testing minimum viable solutions within minimum viable alliances

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.

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.
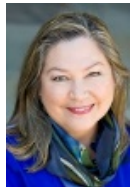
NORMA WATENPAUGH, CSAP
Founding Principal, Phoenix Consulting Group
Best Practices Committee Chair, Association of Strategic Alliance Professionals

Norma Watenpaugh is the founding principal of Phoenix Consulting Group (www.phoenixcg.com) which provides consulting services with expertise in partner strategy, partner management and program development. Prominent clients include Amazon, Adobe, 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. 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, she has led the organization in developing professional certifications and the revitalization of the body of knowledge of alliance best practices resulting in the release of the *ASAP Handbook of Alliance Management: A Practitioner's Guide.* Most recently she serves as the head of the US delegation to the ISO44001 Collaborative Business Relationship Management Standard.

JOHN PARKER, CSAP

UK Professional Development Lead, Phoenix Consulting Group

Former UK Chapter President, Association of Strategic Alliance Professionals

John is a consultant and trainer in business collaboration with a focus on ISO-44001 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 (the precursor to ISO 44001), ASAP Best Practice and Certification exams.

ANN TRAMPAS, CSAP

Professional Development Lead, Phoenix Consulting Group

Former 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.

Phoenix Consulting Group, LLC

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
- IBM
- Lilly
- Microsoft
- Nationwide
- Panduit
- PayPal
- Pearson Learning
- Telstra
- Xerox

Phoenix Consulting Group
PARTNER DEVELOPMENT

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.