

Discovery: Initiating and Developing Strategic Relationships

A Step-by-Step Approach

Executive Summary

All along its life cycle, an organization has an opportunity to develop strategic relationships with a variety of other entities from the public, private, business and not-for profit sectors. Those who embrace a collaborative approach have a stronger opportunity to be leaders, catalysts and facilitators in their industries and sectors. They are open to evolving their strategies and tactics to recognize options, opportunities and the synergy of common understanding and emotional ownership.

Before we go further let's define the relationship.

At the highest levels, an alliance or collation of entities and/or individuals who band together to address a topic or issue in a systematic and strategic manner to generate outcomes and results that are greater than what they can each accomplish separately. Organizations can have multiple partners with various roles. Two entities may have many relationships, thereby capturing the various ways they work together on different priorities:

- Strategic partners
- Collaborators
- Project partners
- Allies
- Funders, donors or supporters
- Volunteers
- Endorsers
- Contractors
- Strategic relationships can also be defined by what they are not: a loose collection of entities or individuals with similar interests.

The distinction is made in how the relationship is created. What follows is a step-by-step approach to initiating strategic relationships.

Identify organizations and individuals that have the potential to engage in strategic relationships with you. Don't pre-judge.

Who else wants the same outcomes? Who has a stake in the success of your industry or a part of your industry? Think deeply the challenges and options you face. Sometimes competitors are the best collaborators, partners, and allies.

Think about whom might be the best? What are their current and potential roles? What do we want and/or expect from them in this relationship?



Once identified, do a preliminary evaluation using available knowledge for a quick assessment of the organization. If there appears to be potential, investigate further:

- Gather baseline information: brief description of company/organization focus, names of decision makers and contact information and priority area business.
- If you've initiated contact with the organization, access or request Level 2 profiles: marketing priorities, company mission, company values/priorities. A Level 2 Profile often includes: internal (from people within the organization) and external Web site (news articles, reports) intelligence to better understand the organization's mission and priorities.

And, don't let geography be a limiting factor. Web, computer and electronic-based technologies can assist communications and enable greater engagement, despite geographical and language distance.

Approach the relationship from a peer standpoint.

How you approach the process sets the stage for the life of the relationship. Even better, approach from a position of strength - as an entity whose role is that of initiator, catalyst, facilitator, leader and alliance builder.

By entering into a discovery process, you've already made some assumptions: despite differences - whatever they may be - your organizations have some common goal for which you are "stronger together." You also understand that each entity contributes - perhaps not equally - but appropriately and proportionately. Now is the opportunity to extend an invitation, using open, engaging and inviting language.

When an organization accepts an invitation to meet for an exploratory session, use bridge-building language: "We look forward to receiving a presentation on your organization's strategy and tactics and are pleased that you have an interest exploring developing strategic opportunities together over time and look forward to laying a cornerstone together at this relationship building and exploratory session."

"Seek first to understand."

Invite potential partners to an exploratory meeting - maybe it's an hour, maybe it's a day - to share their priorities. Show how your organization does business; explain your vision, mission, values, critical issues, and example projects - who your stakeholders are and what's important to them. Look for common values, common ground and areas of common interests as leaders. The relationship doesn't have to be all or nothing (you may agree to disagree on some areas), as long as the relationship benefits each, and both can invest proportionally in the things they care about - relative to their gained value via the win/win relationship.



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Set the stage.

Invite your potential partner to agree on ground rules for your engagement. Decide what values and characteristics are essential to a relationship, particularly in these early stages. Be candid - no need to give away trade secrets, but if you want to entertain a relationship be open where you can. Agree to disagree on specific topics, promote analysis. Stay away from immediate tactical solutions. It's just human nature. People want to keep moving right away. Keeping the early discussion at a high level allows for more explorations and disclosure.

Essential Values for the Strategic Articulation Session

- Innovation
- Honesty/candidness
- Disagreement/diversity
- Teamwork
- Analysis over opinion

Guiding Principals, Understandings, and Rules of the Game:

- Not a traditional or linear strategic planning process
- Not tactical or incremental assessment approach - rather strategic/big leaps
- "Everything is open for exploration and discussion" - open disclosure and boundary stretching is welcome
- Compressed session timeline into one day - overall process is several weeks

Don't let little resistance surprise you.

It's human nature to resist change. At first, especially those with long-standing relationships may opt out for a while. You've changed the game - a game many feel they control. They want to see if you're serious. Sit tight; they'll be back when they feel better, understand the importance of a strategic relationship or when they see your success and impact in other areas.

Conclusion

Strategic relationships - alliances - coalitions - aren't the end all answer to every challenge or every issue. They can be time-consuming. Frustrating. Slippery to manage. But, where they make sense and add value...when they are developed with the end in mind, with the right people on board, and for the right reason, they can catalyze solutions.