

Developing Self AND Relationship
Strategic Alliances, Partnerships and Channels

Training / Learning Series

12 January 2018



Day 2

Discussion and “spill over” (~5.5 hours)



HIGHTECH

Strategic Relationship
Manager Training

<location>, <date>

**The Empowerment of
self-Obsolescence**

1 hour

**Being an
Illuminating Mirror**

0.5 hours

**Healthy Atmosphere
for Negotiating**

1 hour

**Crucibles for On-Going
Transformation**

1 hour

**Developing Self
AND Relationship**

1 hour

**Dialogue: the Heart
of Relationship**

1 hour

Setting context

Introduction and summary

Our work is:

- Challenging, complex and mostly undefined.
 - We do the impossible with nothing in the eye of a hurricane.
- Sacred work:
 - We are *creators* – value-creators.
 - We are concerned about *atmosphere*.
 - We deal with the *invisible, timeless* and *infinite*.

Simplification is empowering.

- It brings with it clarity, alignment and focus.
- It seems synonymous with spirituality.
- And ... simplicity is hard work (e.g., 2-Slides).

There is power in **ANDing** things together.

- This is the essence of alliancing.
- It leads us to the truth that lives in between.
- It seems to be the basis for a spiritual path (vs. either/or).



Expected outcomes from this module

Results

1. **Understand how you can create a unique development plan for:**
 - a. Yourself.
 - b. The alliance.
2. **You will see how you **AND** your alliance are crucibles for transformation, development and growth – together.**
3. **Realize how this development process will be enlightening for:**
 - a. Yourself.
 - b. Your management team.
 - c. The alliance.
4. **You will experience **the power of SPF.****
5. **All of this training will “come together?”**
 - a. In you.
 - b. For you.



Simplify, prioritize and focus (the means)

Destination: simplicity on the other side of complexity

An illustration is needed here; something to illustrate this path:

- Simplistic (naïve) → Complexity (overwhelmed) → Simplicity (empowered)

Make everything as simple as possible, but not simpler.

- A. Einstein

All things being equal, the simplest solution tends to be the right one.

- Occam's razor

Simplify, prioritize and focus (SPF) – the process through this module.

Identity: a value creator

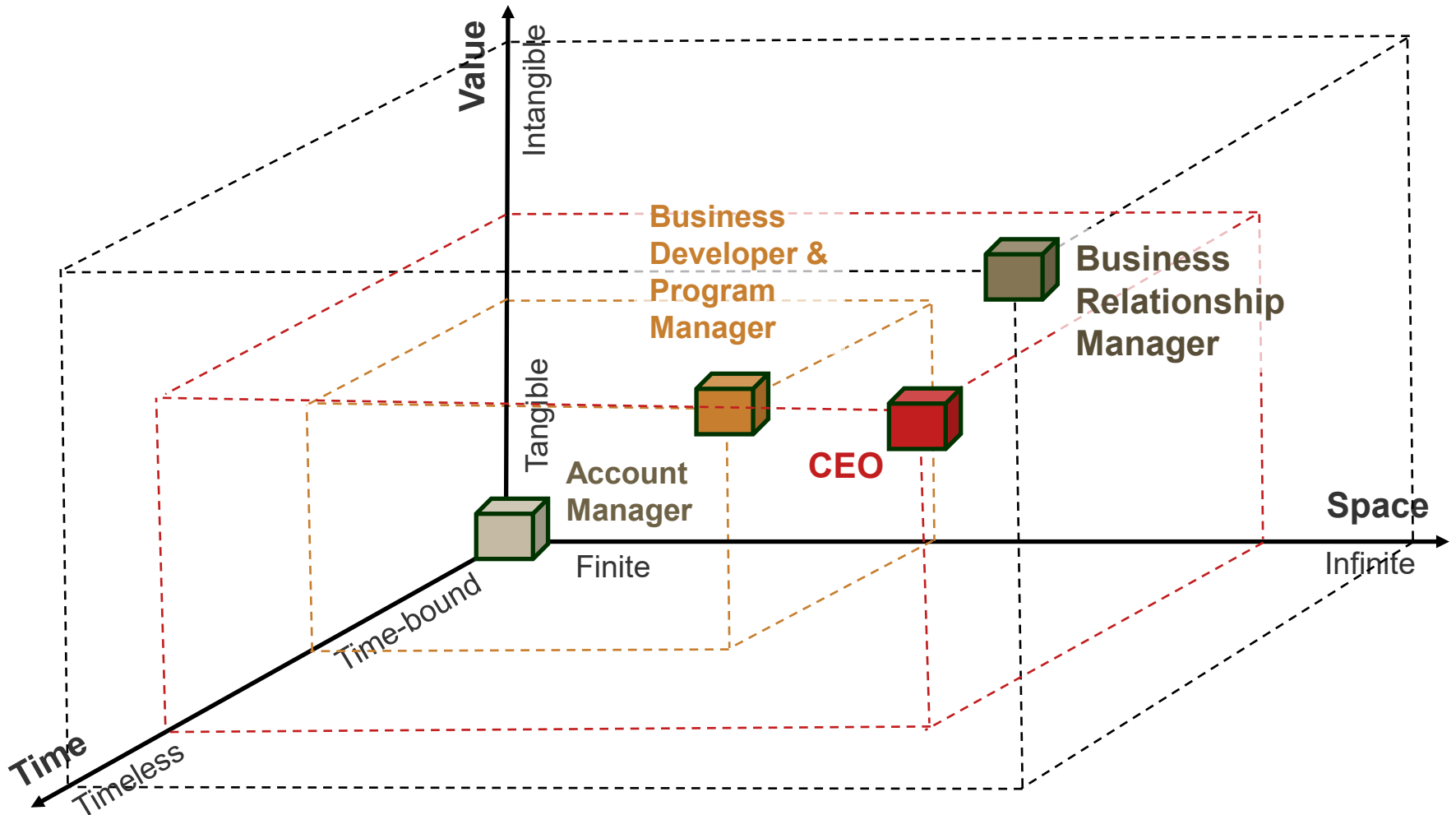
Role: deepen relationship

Business Relationship Manager	
Is Not	Is
<ul style="list-style-type: none"> ▪ Just about the exchange of tangible value. 	<ul style="list-style-type: none"> ▪ About value-creation, in all its forms.
<ul style="list-style-type: none"> ▪ Focused just on near-term results. 	<ul style="list-style-type: none"> ▪ Both long-term <i>and</i> near-term oriented.
<ul style="list-style-type: none"> ▪ Primarily an account manager, business development manager or program manager. 	<ul style="list-style-type: none"> ▪ A negotiator – always leading open, high-trust, value-discovering discussions.
<ul style="list-style-type: none"> ▪ Addicted to being a drama queen, complexity king, fear-monger or information-hoarder – there is <i>never</i> a rational reason for behaving like this; there is a better way of life. 	<ul style="list-style-type: none"> ▪ Like a mini-CEO – except we are using nontraditional competencies, informal power, virtual pervasiveness (via self-obsolence).
	<ul style="list-style-type: none"> ▪ An agent of change and growth – beginning with self, playing various agent types.
<ul style="list-style-type: none"> ▪ Primarily a gatekeeper, dictator, executive liaison, escalation manager or schmoozing drone – <i>sometimes</i> we may need to play some of these roles, but not always. 	<ul style="list-style-type: none"> ▪ The embodiment of value – always and with everyone, in every relationship.
	<ul style="list-style-type: none"> ▪ A creator – a loving, divinely inspired and inspiring, value-creating being.

A boundless value-creator with a timeless perspective

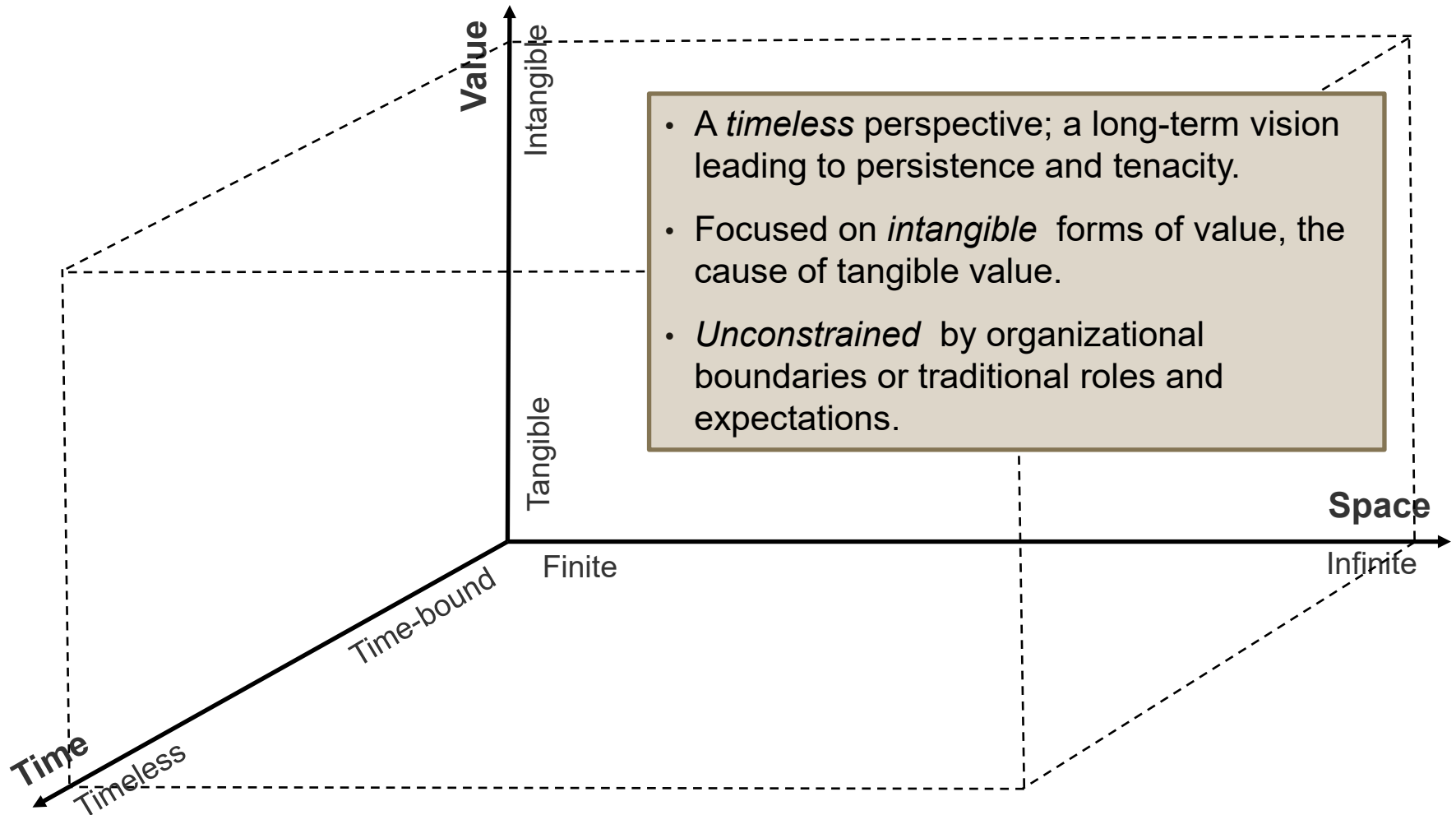
Business Relationship Manager

More timeless, infinite and intangible than any other role



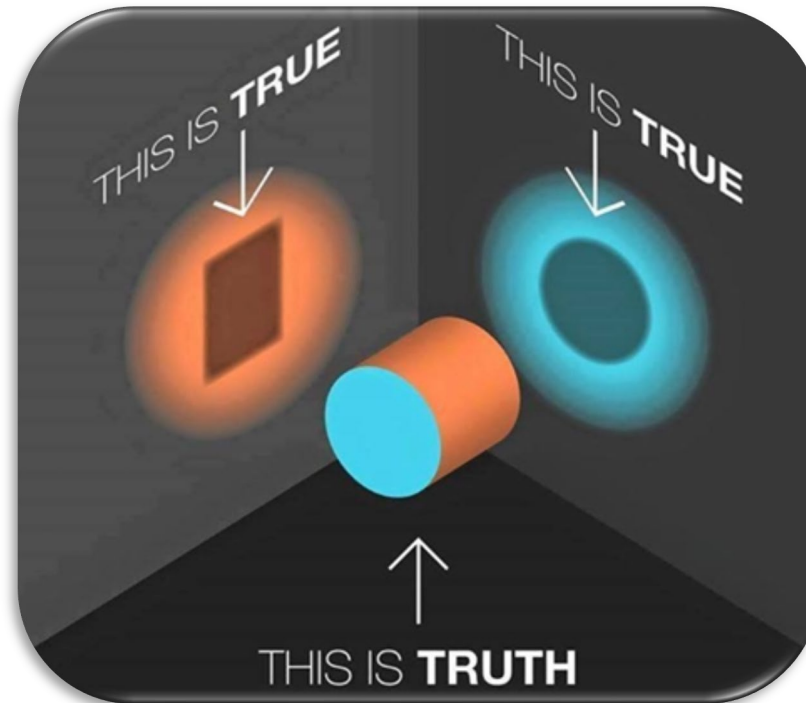
Business Relationship Management

Its sacred nature: timeless, intangible and infinite



The power in **ANDing**

A sacred path toward truth in relationship



- You AND me.
- Us AND them.
- Near-term AND long-term value.
- Tangible AND intangible forms of value.
- Transactional AND relationship views.
- Soft on people AND hard on issues.
- Love AND confrontation.
- Flexible AND stable leadership.
- Controlled AND chaotic atmosphere.
- Authentic AND open.
- **Develop Self AND relationship.**

Tangibles **AND** intangibles

The combination that unlocks the value



Tangible issues

- <60% of success
- Mostly being addressed
- Somewhat superficial

Intangible issues

- >40% of success
- Mostly unaddressed
- Absolutely core

***Transactional* view of business relationships**

Focusing too much on the tangibles can obscure the intangibles



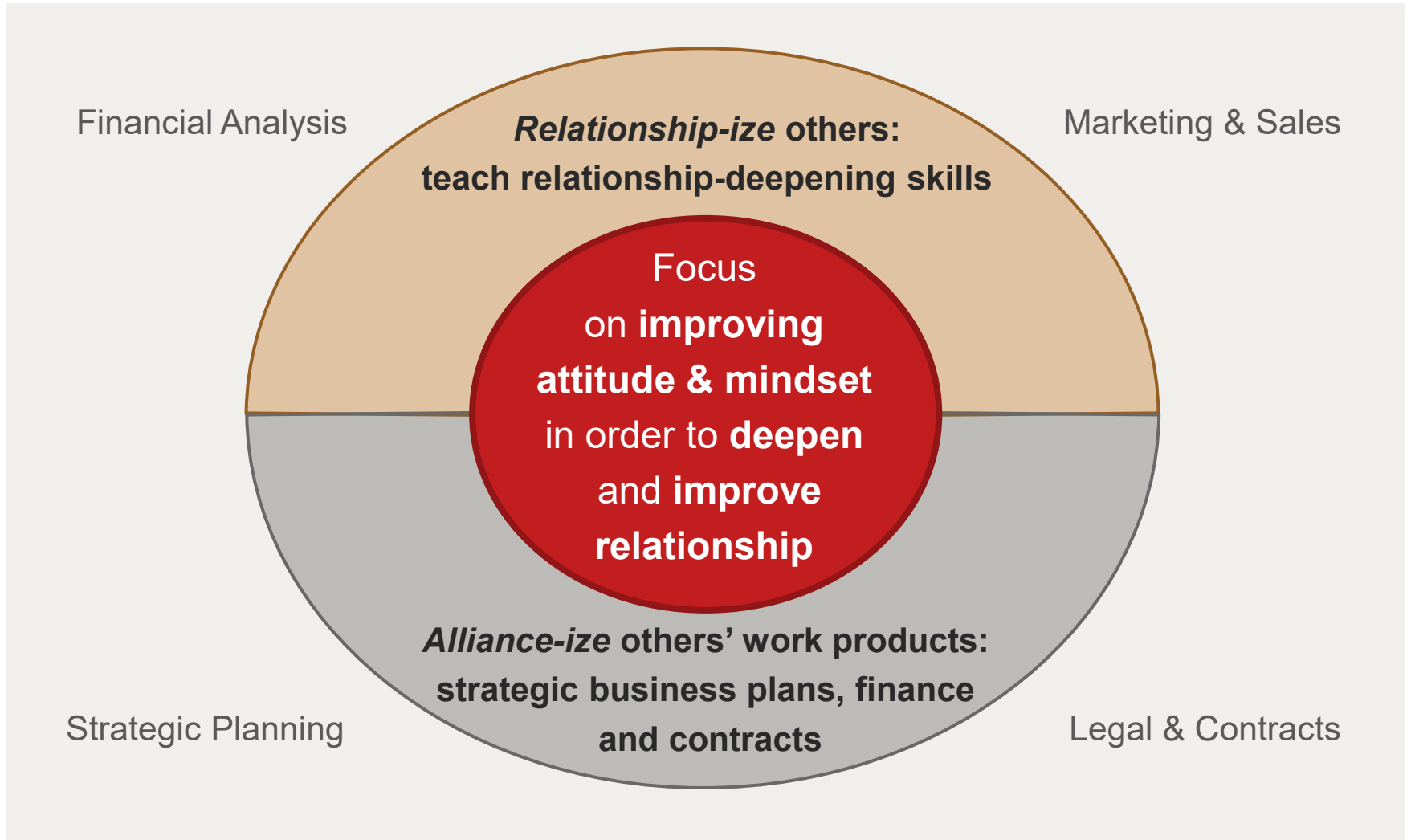
Relationship view of business relationships

Focus on the *intangibles* (e.g., trust) that *create* the tangibles (e.g., sales)



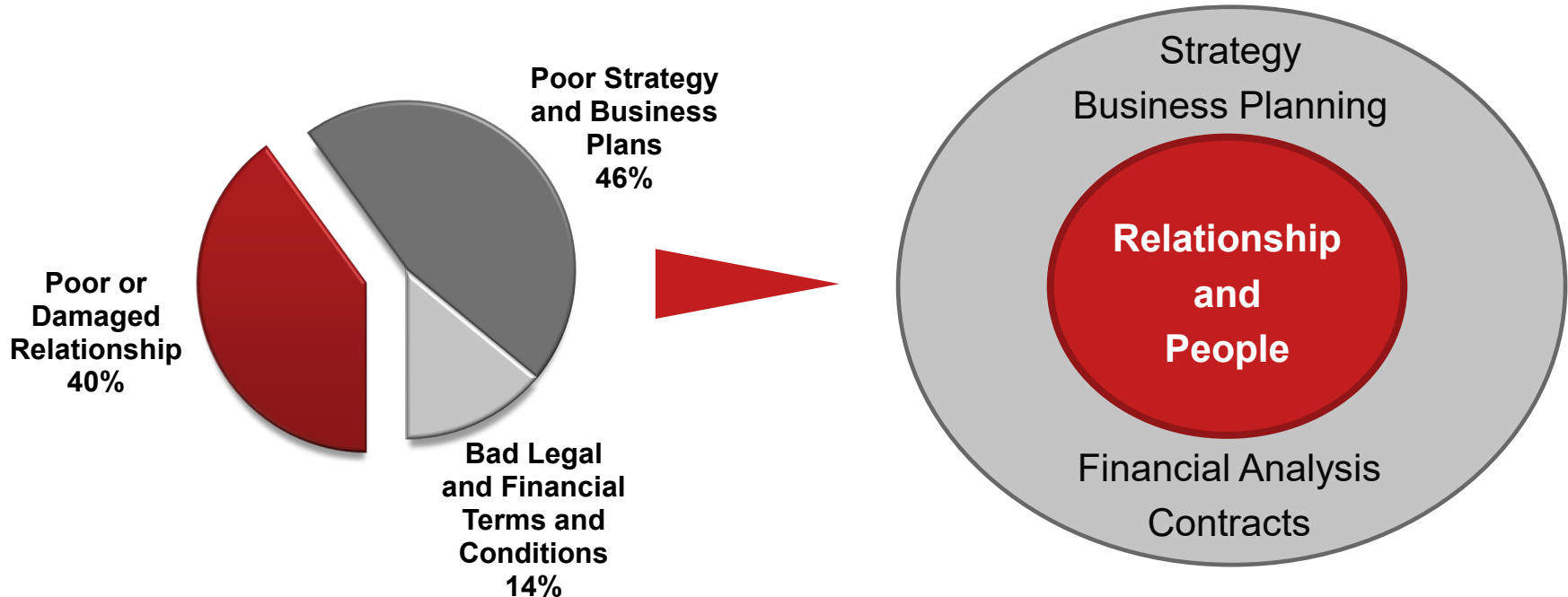
Simplify, prioritize and focus

We will follow **a complex path** to this simple illustration



Business relationships

Where should alliance development focus?

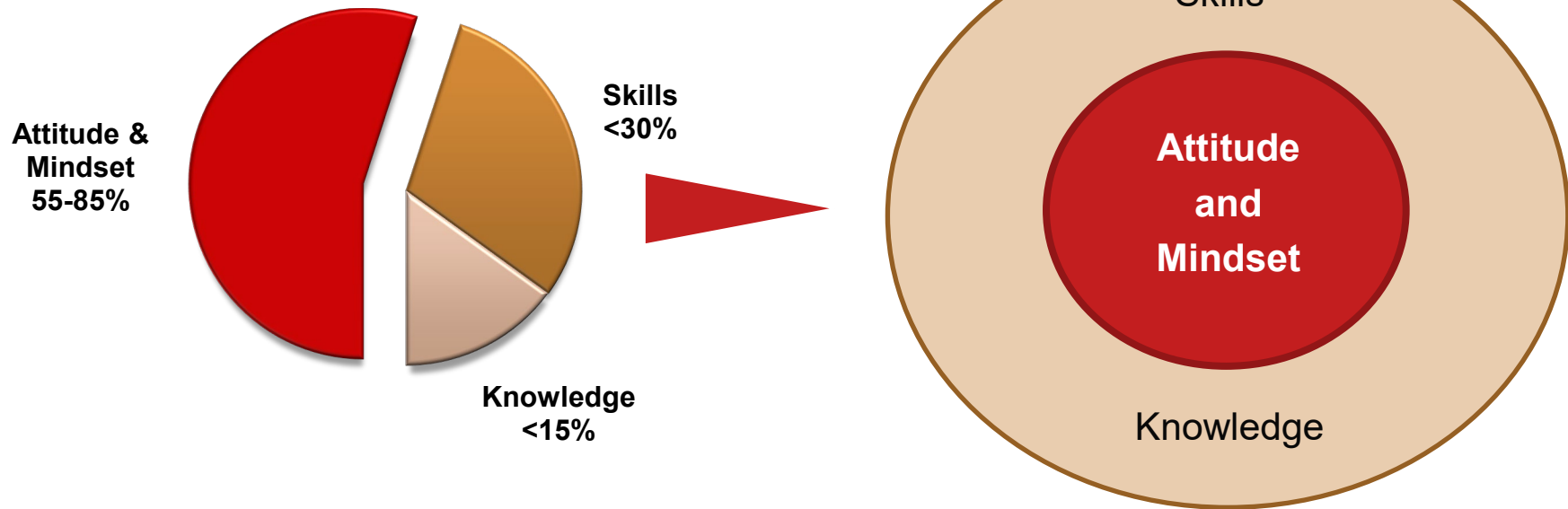


Ref: *Managing Alliances for Business Results: Lessons Learned from Leading Companies* by Jeff Weiss, Sara Keen and Stuart Kliman, Vantage Partners LLC. Three years of research of over 100 alliance managers and executives representing 93 companies in a broad range of industries.

- Over 60% of high-technology alliances fail:
 - 40% directly tied to relationship.
 - 60% indirectly tied to relationship.
- Focusing too much on tangibles results and transactional processes is distracting.

Personal success

Where should personal development focus?



Ref: *The Psychology of Success* by Dobbins, Richard, Pettman, Barrie O from the Society for Human Resource Management. "Knowledge and skills account for 15% of all the success you will ever enjoy. **Attitude** is far more important as it determines **85%** of all the success you will ever enjoy."

- Attitude and mindset accounts for 55-85% of your personal success.
- Skills accounts for <30%.
- Knowledge accounts for <15%.

And yet, where do most people focus?

Your personal success

Framework and **starting point** for development of relationship (be **Self-centered**)

Business Relationship Success

Strategy & Business Plan

Relationship & People

Finance & Legal

Personal Success

Skills

**use of knowledge, acquired abilities, methodologies,
competencies, power**

Attitude & Mindset

**perspective, interpretation, expectations, beliefs;
sense of self and the world**

Knowledge

facts, information, familiarity, vocabulary, truth.

Knowledge (affects <15% of your success)

Facts, information, familiarity, vocabulary, truth

Business Relationship Success

		Strategy & Business Plan	Relationship & People	Finance & Legal
Personal Success	Skills	<ul style="list-style-type: none">□ recognize good strategic & business plans□ know how plans will address relationship and people issues	<ul style="list-style-type: none">□ know yourself; be true to yourself□ identity; who do you think you are?	<ul style="list-style-type: none">□ major terms used in financial analysis□ know what a good analysis looks like
	Attitude & Mindset	<ul style="list-style-type: none">□ understand each company's: strategy, organization, decision-making, customers, competitors, offerings, and ecosystems□ know trends: global, industry, regulations, technology, ecosystem	<ul style="list-style-type: none">□ know both companies: relationship & people issues, cultural & strategic differences, emotional basis for decisions□ know the people you work with, empathize, related, connect	<ul style="list-style-type: none">□ key legal issues, terms and conditions: indemnification, IP rights, confidentiality, liability, residuals, exclusivity, non-recruit□ regulatory issues: anti-trust, non-compete, Sarbanes-Oxley, monopoly, regulations, ethics, transparency
	Knowledge	<ul style="list-style-type: none">□ understand strategic linkages between alliance and corporate: strength, reciprocity	<ul style="list-style-type: none">□ know formal and informal sources of power□ know true power comes from giving and serving, and is reciprocated	<ul style="list-style-type: none">□ use of formal vs informal agreements: where and why to use either, tradeoffs.

Knowledge (**SPF'd**) (example content)

Facts, information, familiarity, vocabulary, truth

Business Relationship Success

Strategy & Business Plan

Relationship & People

Finance & Legal

Personal Success

Skills

**use of knowledge, acquired abilities, methodologies,
competencies, power**

Attitude & Mindset

**perspective, interpretation, expectations, beliefs;
sense of self and the world**

Knowledge

- good business plans
- both sides' strategies, customers, ecosystem, technology ...trends ...
- linkages between alliance & corporation

- know & be true to self
- know both companies' organizational & cultural differences
- sources of power

- financial terms
- legal terms & issues
- regulatory issues
- use of formal vs. informal agreements

Skills (affects <30% of your success)

Use of knowledge; abilities, methodologies, competencies, power

Business Relationship Success

		Strategy & Business Plan	Relationship & People	Finance & Legal
Personal Success	Skills	<ul style="list-style-type: none">ability to conduct tactful due diligence: strategic & cultural fit, competenciescapability to establish clear linkages: between companies and withinability to develop and implement plans: clear & compelling vision, messaging within & into ecosystem, focus, time management, use of traditional planscapacity to alliance-ize planners: relationship, performance metrics, expand perspective on value, patience and persistence	<ul style="list-style-type: none">management of self: SPF, time, confidencetreat relationship as <i>the</i> strategic assetability to holistically listen: individuals, collective, tough issuesloving confrontation, clean talk, clear the airhealthy atmosphererelationship-ization: presence, awareness, simplicity (2-slides), self-obsolescence, illuminating mirror, community/homejust-enough and just-in-time coachinghelp others “get it”	<ul style="list-style-type: none">ability to do reasonably detailed analysis: alliance performance, programsability to translate conceived intangible value into tangible forms; monetization of the invisible & infinitealliance-ization skills: help others “get it”, be open and risk-tolerantability to help others value relationshipability to develop & use informal teaming documents: adaptive & evolutionary tooluse of formal contracts, where needed
	Attitude & Mindset			
	Knowledge			

Skills (SPF'd) (example content)

Use of knowledge; abilities, methodologies, competencies, power

Business Relationship Success

Strategy & Business Plan

Relationship & People

Finance & Legal

- tactful due diligence
- link alliance to corp.
- implement alliance plan
- relationship metrics
- alliancize planners

- holistic listening
- embrace differences
- nontraditional skills
- empathetic rapport
- helping others "get it"

- Δ intangible → tangible
- alliancize others to value alliance & relationship
- use of informal teaming documents & formal legal contracts

Skills

Attitude & Mindset

perspective, interpretation, expectations, beliefs;
sense of self and the world

Knowledge

facts, information, familiarity, vocabulary, truth.

Personal Success

Attitude & mindset (affects 55-85% of your success)

Perspective, interpretation, expectations, beliefs; sense of self and the world

Business Relationship Success

		Strategy & Business Plan	Relationship & People	Finance & Legal
Personal Success	Skills	<ul style="list-style-type: none"> be collaborative with planners; be patient as they learn nuances of alliancing see strategic plans as providing vision realize strategic plans provide contextual meaning & purpose see alliance as <i>part of</i> overall business; strategic reciprocity see and share unique perspectives: non-traditional competencies, intangible and infinite perspectives share strategic value seen in <i>relationship</i> 	<ul style="list-style-type: none"> be enthused by problems & challenge perceive others as Self; “we” and oneness help others see that problems, answers and opportunities all live <i>in</i> relationship a timeless perspective & presence, here & now be mindful, thoughtful & creative: thought creates, see patterns; be open-minded be open-hearted: focus on goodness, trust, forgiveness (see truth) attitude & mindset are causal, fundamental 	<ul style="list-style-type: none"> respect and patience for lawyers and financial analysts perceive legal work as <i>protecting</i> the business perceive financial work as focused on <i>value</i> help translate long-term intangibles into near-term tangibles be patient and persistent; help traditionally-mind folk “get it”; help them see the non-traditional aspects of alliancing help them confront risk, see longer-term and expand ideas around value
	Attitude & Mindset			
	Knowledge			

Attitude & mindset (**SPF'd**) (example content)

Perspective, interpretation, expectations, beliefs; sense of self and the world

Business Relationship Success

Strategy & Business Plan

Relationship & People

Finance & Legal

Skills

use of knowledge, acquired abilities, methodologies,
competencies, power

Attitude & Mindset

- collaborate w/planners
- sees plans providing “vision” & meaning
- “part of” but with unique perspectives

- enthused by challenge**
- perceive others as self**
- a timeless presence**
- creatively mindful**
- focused on goodness**

- respect for financial analysts & lawyers
- sees legal protection & financial “lifeblood”
- be patient & persistent

Knowledge

facts, information, familiarity, vocabulary, truth.

Personal Success

There are better slides in "Strategic Alliances – creative relationships"

Simplify, prioritize and focus (further SPFing)

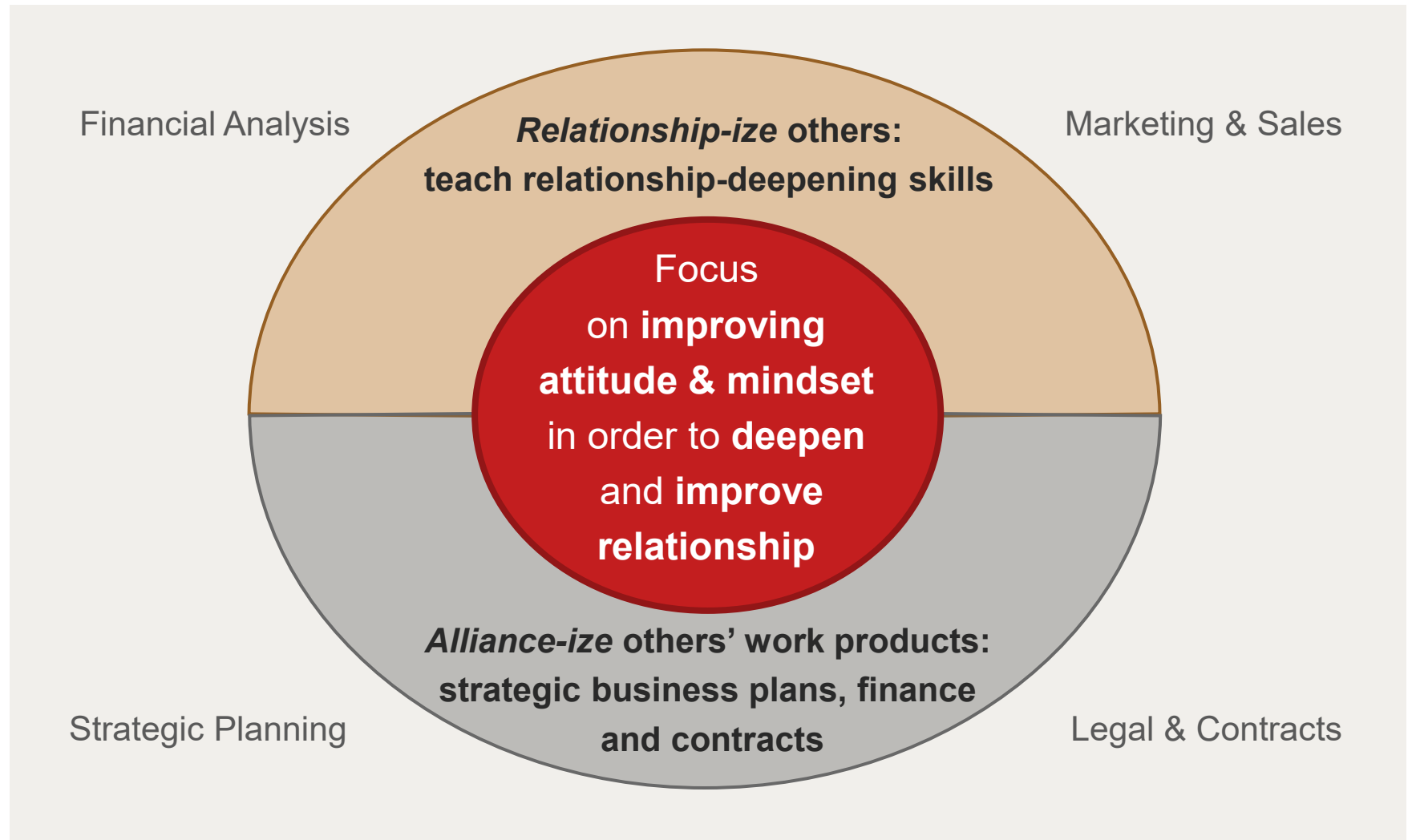
On the core in self and relationship (example content)

Business Relationship Success

		Strategy & Business Plan	Relationship & People	Finance & Legal
Personal Success	Skills	<ul style="list-style-type: none"> tactful due diligence link alliance to corp. implement alliance plan relationship metrics alliancize planners 	<ul style="list-style-type: none"> holistic listening embrace differences nontraditional skills empathetic rapport helping others "get it" 	<ul style="list-style-type: none"> Δ intangible → tangible alliancize others to value alliance & relationship use of informal teaming documents & formal legal contracts
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	Knowledge	<ul style="list-style-type: none"> good business plans both sides' strategies, customers, ecosystem, technology ...trends ... linkages between alliance & corporation 	<ul style="list-style-type: none"> know & be true to self know both companies' organizational & cultural differences sources of power 	<ul style="list-style-type: none"> financial terms legal terms & issues regulatory issues use of formal vs. informal agreements

Simplify, prioritize and focus (**final SFPing**)

Focus where others cannot and will not focus



Live a Life of Bliss

Do what ... you do well, you love, the world needs, and the world values

