



Strategic Relationship Management in a World of Opportunity

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Facilitator



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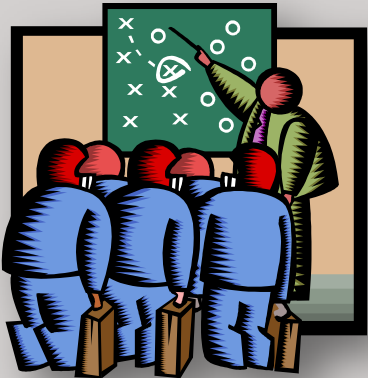
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Goals



- Introduce a model of Strategic Relationship Management (SRM)
- Allow participants time to:
 - Identify and map out their foundation's strategic relationships
 - Identify the challenges of managing SRMs
 - Use the SRM model and other tools to:
 - Identify goals of the relationship
 - Analyze that relationship using the SRM model
- Facilitate discussion and learning from each other

Strategic Relationship Management (SRM)



- **Some Definitions:**
 - Strategic Relationship (SR)
 - A working relationship which is essential to realizing the Community Foundation's mission, vision and/or strategy.
 - Strategic Relationship Management (SRM)
 - A foundation's ability to proactively define, identify, build, sustain, repair and leverage strategic relationships.

Identifying Your CF's Strategic Relationships

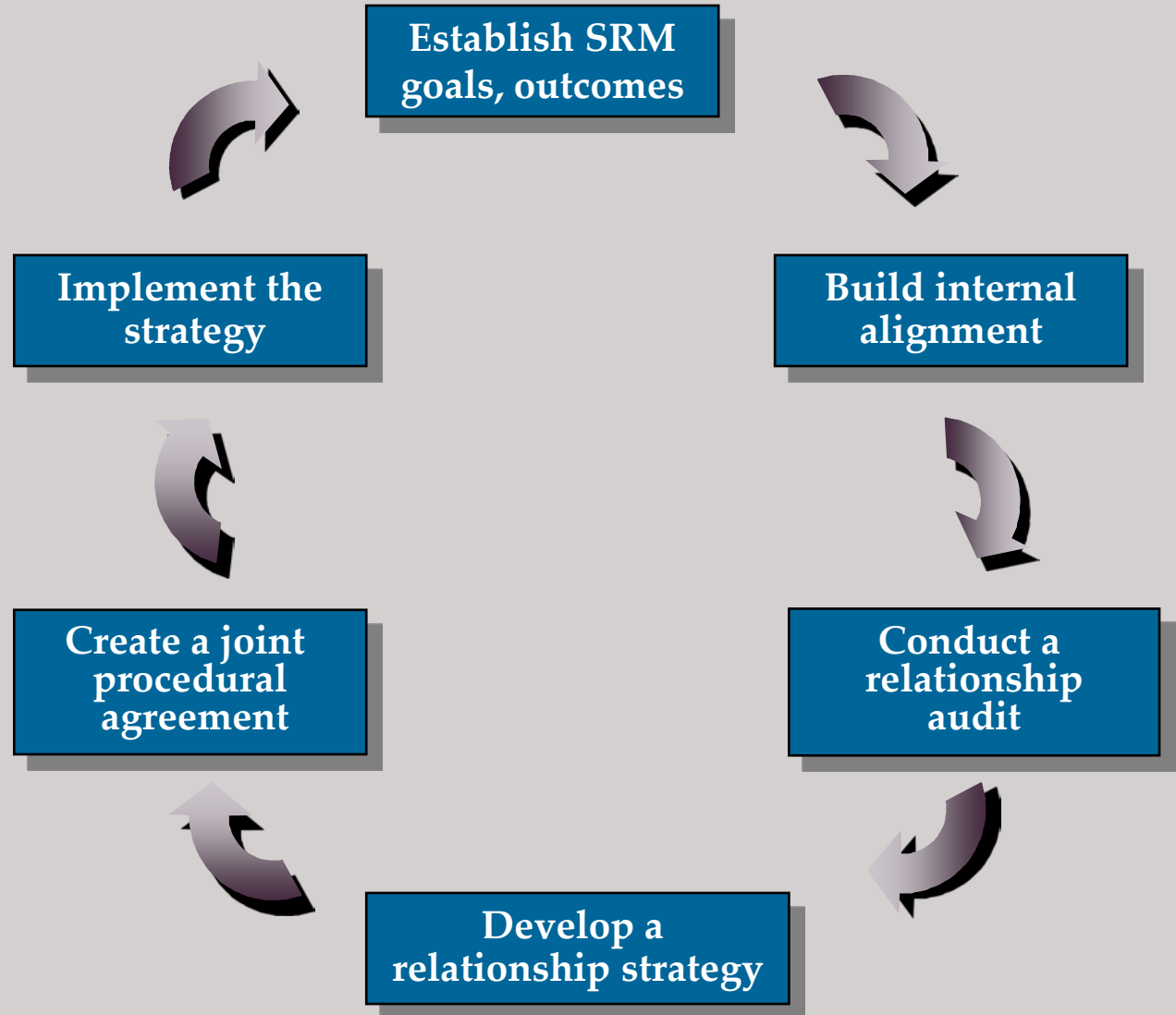
Internal Strategic Relationships

Strategic Relationships within the Foundation

External Strategic Relationships

Strategic Relationships External to the Foundation

Model of Effective Strategic Relationship Management



Analyzing a New or Existing Strategic Partner Relationship

Name/Organization: _____

Internal Foundation Strategic Relationships

Whose cooperation, support, or expertise is needed to achieve your goals with this external Strategic Relationship.

External Strategic Relationships

Map out the key parties with whom your Strategic Relationship partner must interact to respond to your requests.

Challenges and Opportunities in This Strategic Relationship



Challenges:

Opportunities:

Establish SRM goals, outcomes

- What are our (the foundation's) goals in seeking this relationship?
- Why is it in their (SR's) interest to build a relationship with us? What might their goals be?
- If our foundation were successful in achieving our goals, how would we know it? What would be different?

Build internal alignment

- As part of Strategic Planning the board and key foundation executives should:
 - Identify potential Strategic Relationships.
 - Reach consensus on the purposes, goals and outcomes desired from each of those relationships.
 - Work with staff to develop and implement a plan to establish, leverage or repair those relationships.
- Foundation President should meet with staff to:
 - Share decisions on who the strategic partners are and why they have been selected.
 - Introduce the SRM model and plan for establishing or maintaining the SR's.
 - Assign clear roles and responsibilities among staff regarding SRM.

Conduct a relationship audit

- Using the relationship audit tool, the parties designated with the role of establishing the SRM should fill out the grid based on how they see the current relationship.
- Then they are ready to meet with the SR target and:
 - Share their goals and desired outcomes for a strategic relationship
 - Solicit SR's goals and desired outcomes
 - Explicitly discuss the similarities, differences among your goals
 - Inquire as to a mutual interest in pursuing an SR
 - If yes: Arrange for the SR to take the relationship audit survey anonymously and map out a series of SR exploration meetings

Assess Your Working Relationship With A Strategic Partner (“SP”)

	Never (1)	Rarely (2)	Sometimes (3)	Generally (4)	Always (5)
We understand each other’s interests, concerns, and priorities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We are able to generate creative, out-of-the-box solutions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We have candid conversations with each other.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conflict is handled constructively.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There is openness and trust in this group.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mutual respect is evident in word and action.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When something goes wrong, we focus on solving the problem, not on blaming each other.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When something goes wrong, we give each other the benefit of the doubt.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
On issues that impact the other, we consult before making a decision.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
We are willing to take risks with each other.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Is The SP Relationship Strategic or Transactional?

Strategic	Transactional
You know enough about the SP's organization or business to complete a deal or transaction.	You understand the long-term goals, challenges and risks of the SP organization and they understand yours.
You interact with the organization when you need something--a product, service or a problem solved.	You plan regular ongoing interactions to monitor the relationship and the results you both are seeking.
You deal with problems as they arise.	You jointly anticipate and plan for problems before they arise.
The terms of the relationship are dictated by who has the most power/leverage.	The terms of the relationship are mutually negotiated.
You review the relationship when the contract expires or when something goes wrong.	You jointly develop an ongoing process for reviewing whether the relationship is producing the results all parties want .
You use terms like "partner," "alliance," without a clear definition of what they mean operationally.	You have explicitly and jointly defined the terms and protocols which govern your working relationship.
You have no criteria or process for reviewing or revising the relationship.	All parties have a defined process for reviewing and revising the relationship.
The Strategic Partnership satisfies your needs.	The Strategic Partnership is mutually beneficial and meets the interests of all parties.

Develop a relationship strategy

- Using the relationship audit data, meet internally to develop a relationship strategy designed to meet both foundation goals and the SR's goals.
- Meet with the SR/s, share the audit data, and develop a Procedural Agreement[©] about how you will work together.
- Build into the Procedural Agreement[©]:
 - Regular check-in times to assess how the relationship is working, whether it's achieving mutually desired goals.
 - A plan for addressing conflict or other challenges that could derail the relationship.
- Each party to the Procedural Agreement[©] should seek their respective Board's approval of the document.

Create a joint procedural agreement

- Jointly designate members from each organization to the SR Exploratory Committee (SREC).
- SREC: Develop an outline of what needs to be addressed in the Procedural Agreement[©].
- SREC: Appoint a joint sub-group (members from each organization) drafting team to flesh out the outline of the contents of a Procedural Agreement[©]
 - Drafting team has no power to decide, or commit either organization.
 - Their job is to come up with ideas and draft language for review and criticism by whole group.
- Use the One-Text Process[©] to deal with differences about the Procedural Agreement[©]'s content.

Procedural Agreement[©]



- **pro • ce • dur • al a • gree • ment** *n.*
The effective practice of clarifying and codifying mutual expectations among team members, between organizations, etc.

Ineffective if left implicit or assumed.
- *antonym*
A list of “do’s” and “don’ts” recommended by consultants or imposed by managers, too long to remember and too asinine to pay attention to.

Procedural Agreement[©] Table of Contents: An Example

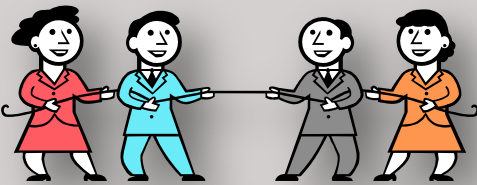


- Preface: Vision and goals, definition of the nature of the relationship
- Categories within Strategic Partnership
 - Desired SR outcomes
 - Strategy, roles and responsibilities
 - Communication
 - Decision-making
 - Planning
 - Working relationships
 - Surprises
 - Conflict resolution
- Specific behaviors to support an effective Strategic Partnership

Implement the strategy

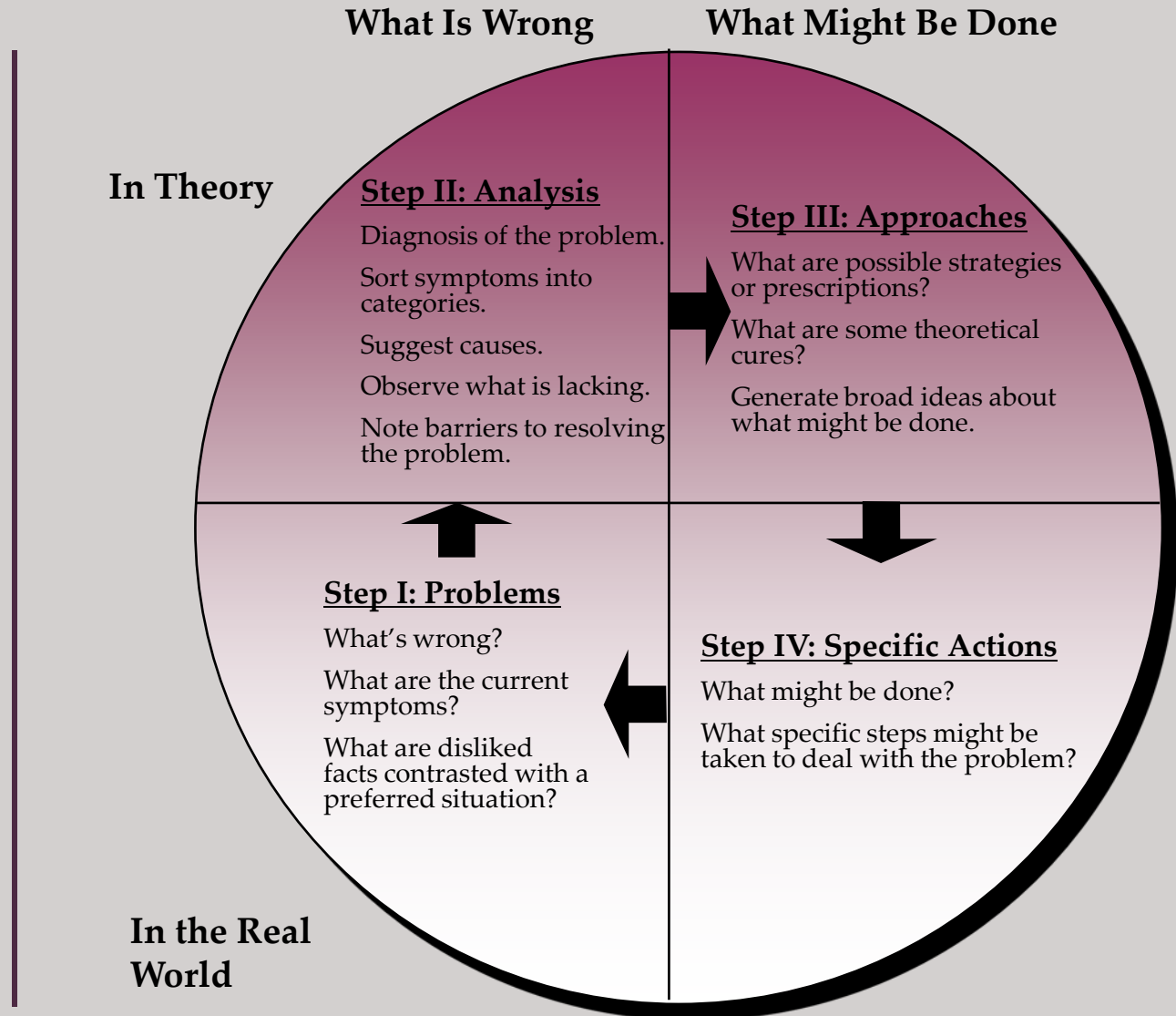
- Appoint an SRM liaison from each organization to serve as:
 - Point person when things are going wrong.
 - To cut through bureaucracy and red tape within their respective organizations.
 - To convene periodic check-in sessions to see how the relationship is doing.

Trouble Or Conflict In The Relationship?



- Use the Four Quadrant Tool[©] internally to:
 - Develop a deeper understanding of the nature of the problem and why it exists
 - Develop a strategy to deal with the conflict or trouble
- Meet with the target SR; jointly use the Four Quadrant Tool[©] in the same way.
- Appoint a joint team to implement the strategy that is developed.

**The Four
Quadrant
Tool[©]:**
*The Four
Steps to
Invent
Options*



Ki ThoughtBridge Four Quadrant Problem-Solving Tool[©]

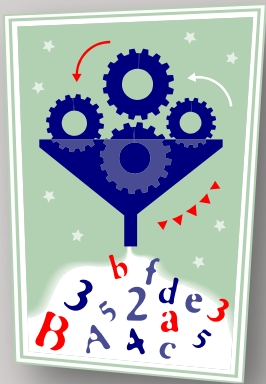
I. Problem: Symptoms & Goals **II. Diagnoses: Possible Causes or Barriers** **III. General Approaches and Strategies** **IV. Specific Actions**

Current Situation

Preferred Situation



Elements of Effective Strategic Relationship Management



- 1. Clarify the goals
 - Regarding outcomes
 - Regarding the working relationships
- 2. Develop internal alignment about the goals and strategy.
- 3. Conduct a relationship audit.
- 4. Analyze the audit results and prepare a relationship strategy.
- 5. Meet with the Strategic Partner, repeat step 1, discuss results of step 2 and 3.
- 6. Jointly develop a procedural agreement for the strategic relationship.

*Experience comes from what one does;
competence comes from what one does well;
wisdom comes from what one does badly.
Success comes from learning from all three.*

- Anonymous



Services Offered

- **Training and Coaching in:**
 - Strategic Relationship Management
 - Leadership Development
 - Negotiation
 - Conflict Management
 - Change Leadership
- **Facilitation, Meditation of:**
 - Complex Negotiations
 - Labor Management Negotiations
 - Community and Business Conflicts and Disputes



Coming Soon: Constructive Conflict Management Kit[©]

Ki ThoughtBridge is excited to announce the new
Constructive Conflict Management Kit[©].

Ki ThoughtBridge's Constructive Conflict Management Kit[©]:

- Defines the characteristics of healthy and unhealthy conflict management
- Outlines a four step process for managing conflict constructively
- Gives users a series of tools which maximize the probability of success at each step in the conflict resolution process

If you, your organization or team would like to be notified when the new Constructive Conflict Management Kit[©] is available, please contact Sue Schraffa at 317.822.8205/ sschraffa@kithoughtbridge.com or visit our website at www.kithoughtbridge.com

