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Strategic Alliance QUARTERLY

Q4 2021

DREAM TEAM

What Goes into the Creation, Care, and Feeding of a High-Performing Alliance Management Team? A Lot More Than Meets the Eye

And...

- **Building a Tech Alliance Program from the Ground Up**
- **"Excellence Is Always Our North Star"—Even in Hybrid Meetings**
- **Ride the Wave! The Fourth Wave of Collaborations, That Is**
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- **What's Happened to Partner Compensation? A Revolution in the Making**

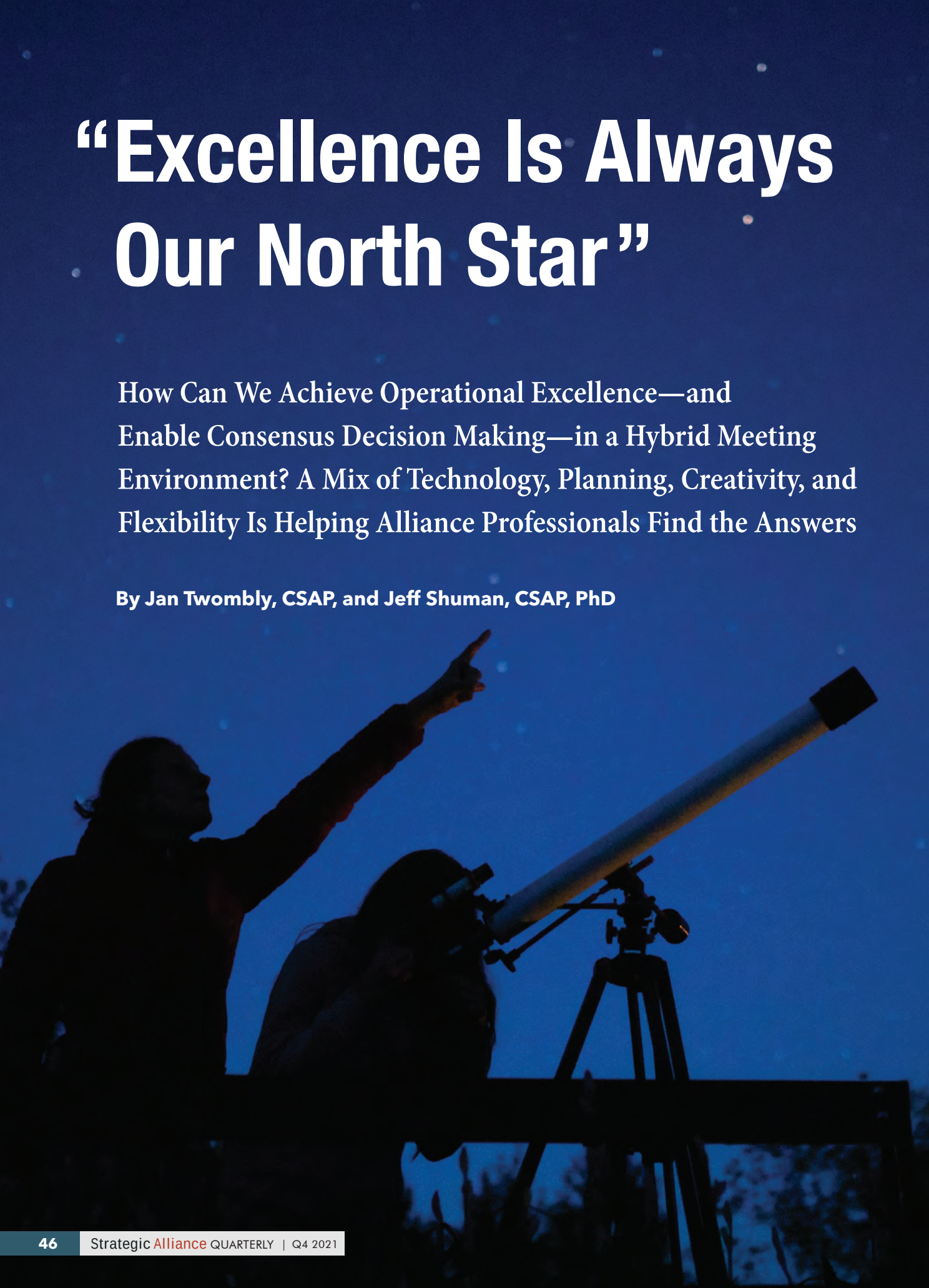
Plus:

- ***Editorial Supplement:*** **Partnering Roadblocks and the Alliance Hierarchy of Needs**

"Excellence Is Always Our North Star"

How Can We Achieve Operational Excellence—and Enable Consensus Decision Making—in a Hybrid Meeting Environment? A Mix of Technology, Planning, Creativity, and Flexibility Is Helping Alliance Professionals Find the Answers

By Jan Twombly, CSAP, and Jeff Shuman, CSAP, PhD



The title of this article came from the participant introductions in our sponsor's executive roundtable following the 2021 ASAP BioPharma Conference, very nicely summing up the sentiments of the assembled. Regardless of the environment, process, or activity, excellence in alliance management is the North Star we strive for. And oh yes—we are likely doing this in a hybrid meeting setting, with some people in a room physically together and others remote. It creates a new dynamic in many ways, especially for making complex decisions, potentially necessitating a more prescriptive approach than was used when everyone was in a room and had built relationships over multiple opportunities to "hug and break bread," as Jeff likes to say.

Getting a Little Better Every Day

Earlier this year, we published "Seven Habits of Highly Effective Alliance Professionals Who Deliver Value."[1] One of the habits is "Build Operational Excellence," which enables organizations and their stakeholders to benefit greatly from "having the foundational elements of alliance management be non-issues so that we can focus on the more strategic aspects," according to one of our roundtable participants.

At its core, operational excellence in alliance management means *delivering leading performance across all measures of value by consistently executing the fundamentals of alliance management a little bit better every day*. It is important to understand that excellence is not a skill. It is an attitude, a mindset. It is the way you think and therefore act on how to deliver value to stakeholders that enables them to deliver excellence in their domain. To get "a little better every day," a learning environment informed by data helps measure progress toward both short- and long-term objectives.

Excellence is not a skill. It is an attitude, a mindset.

Achieving operational excellence in alliance management has many advantages. It is not much of a stretch to extend the findings of **Rob Cross**, professor of global leadership at Babson College, that top-performing collaborators are able to find themselves nearly an additional day per week.[2] After all, alliance managers are expert collaborators!

Operational excellence in alliance management fundamentals requires:

- **Building a top-notch alliance management team** that exudes confidence, is multidimensional in its abilities with a mix of generalists and specialists, and has strong relationships with key stakeholders.
- **Operating proactively, not reactively**, in a manner that sees and seizes opportunities and gets ahead of risks.

- **Adopting a portfolio perspective** to segment alliances and follow a management strategy that allocates professional resources, providing services according to a predefined value and complexity rubric—and gives other parts of the organization responsibility for some aspects of partnering, such as managing routine team meetings, milestones, and payments.
- **Enabling stakeholder and partner success** through purposeful stakeholder engagement to understand what matters to them, how they need to contribute to alliance success, and how to elevate their partnering abilities so they are adding value to the alliance.
- **Implementing a digital platform** to serve as a system of record for alliance management, enabling data-driven decisions, providing the ability to scale, and making the work of alliance professionals visible to executives through customized reporting.
- **Efficiency, effectiveness, and innovation in core responsibilities**, especially around key value inflection points in an alliance's life cycle, such as the startup process, and in managing the governance process to timely make complex decisions that create the most value for customers and the partners.

It is a big agenda, and every one of our roundtable participants is pursuing some or all of it. As was said during the session, "Excellence is a given to elevate the importance of managing alliances and partners well for achieving the partnering outcomes we want." And another piece of advice: "Based on your organization, portfolio, and stakeholders, choose where to be excellent and develop alternatives for deprioritized tasks."

Pursuing Excellence in a Hybrid Environment

Many people are hoping to return to their offices and meet with their alliance teams and partners, holding governance meetings or quarterly business reviews in-person. But some are and some aren't. Some companies aren't allowing travel until at least 2022. A recent McKinsey survey found that "90% of organizations will adopt some combination of remote and on-site work as they emerge from Covid restrictions."[3]

The upshot is that alliance professionals find themselves having to design, organize, and facilitate important meetings that may be in-person (likely with face masks), completely remote, or somewhere in between—a hybrid, in other words. Each meeting scenario requires something a little different to be successful, with the hybrid meeting the most challenging to get right. In many organizations, management is looking to the company's alliance professionals for leadership in this area, partly because meeting and working with partners has always had some element of remoteness or distance to it, and partly because of our collaboration expertise.

Each meeting scenario requires something a little different to be successful, with the hybrid meeting the most challenging to get right.

Hybrid meetings are not new—remember the old Polycom speakerphone on the conference room table with someone on the other end, frequently overlooked? What is new for meeting facilitators is managing the transition from everyone being in the room or everyone remotely connecting from individual devices to having some people together, others online, and the regular use of collaboration technologies instead of teleconferences. People are finding that to make a hybrid meeting work well, it should be an online meeting with everyone, even people in the same room, communicating through their devices and using online tools to display content and capture the discussion.

Challenges and Benefits of Hybrid Alliance Meetings

During the 2021 ASAP BioPharma Conference, we led a Master Class called "Operational Excellence for Consensus Decision Making in a Hybrid Environment."[4] In it, we shared a number of practical considerations for organizing and leading hybrid alliance meetings, mindful of the need to deliver an experience in which complex decisions could be pursued in a way that maximizes value—and recognizes that after more than 18 months of largely remote work, there are alliance meeting participants who have never met each other in person. There are also people on your own team who only have digital relationships with each other. The distance "is starting to fray relationships," according to one executive in the session.

After more than 18 months of remote work, the distance "is starting to fray relationships," according to one executive.

Hybrid meetings emphasize the challenges present in any meeting format, including:

- **Power imbalances:** It is still easy for people who are physically together to dominate the meeting.

- **Logistical/technical complications:** Even large companies are finding that their meeting room technology isn't as good as it needs to be and that the technology is not as intuitive as it seems.
- **Cost of emotional labor:** "Zoom fatigue" is real. It requires more focus and attention to participate in and keep track of a hybrid meeting. If you are the facilitator, the difficulty and complexity of the moving parts you must manage is exponentially greater than in an in-person meeting and a magnitude above that of a fully remote meeting.

At the same time, hybrid meetings provide a number of benefits, including:

- **Inclusiveness:** Without the time and expense of travel, it is easier to ensure that relevant colleagues are included, although managing global time zones often means someone is participating very early or very late in their day and may not be as sharp as you would like.
- **Richness of media:** The addition of video and the use of online collaborative tools including breakout rooms, automated whiteboards, and documents multiple people can access in real time, just to mention a few, creates a much more engaging experience than a conference call with a shared slide deck.
- **The end of multitasking:** Well, maybe not. We thought people wouldn't multitask if you could see them doing so. We're finding out that for some people the video does keep them focused; others are ignoring requests for "cameras on" and dividing their attention.

Traditional good meeting practices are more important than ever with hybrid meetings. This means properly designing and preparing the meeting, timely circulating collaboratively prepared agendas and prereads, and most important, being familiar with and checking the technologies you will use. Check the technology from the perspective of each way participants will engage. In a recent workshop, one alliance professional told us how happy she was with the way the technology in the room she was in was working—only to get a barrage of complaints from remote participants who couldn't see the faces of anyone in the room or make out who was speaking!

Contrasting the characteristics of in-person with hybrid meetings (Figure 1) highlights a number of key differences:

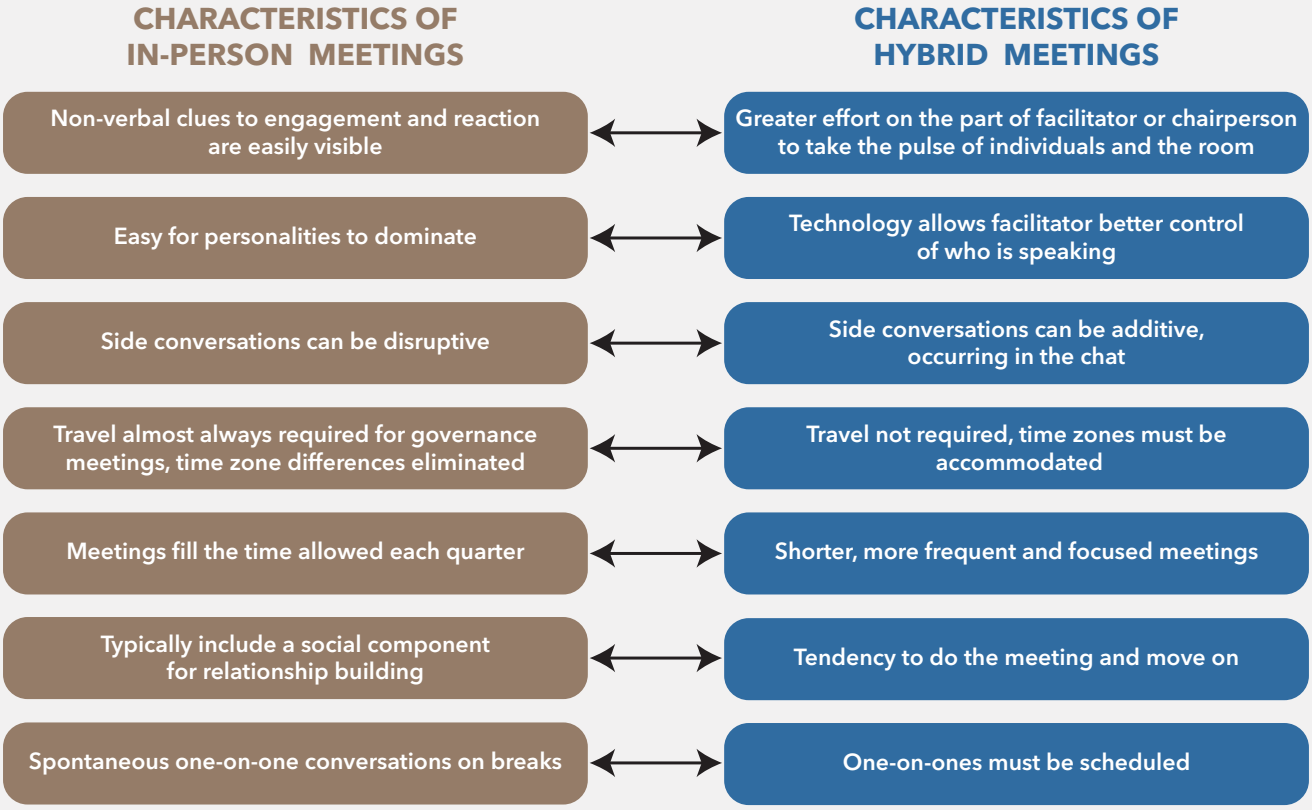


Figure 1

During a meeting there are many tasks for the facilitator to execute. Perhaps the most important is to ensure that all participants have the opportunity to engage. Also, keep in mind the important role in-person alliance meetings have in building relationships. Open the "room" and encourage people to come early for some small talk and non-business catch-up. It is also a good idea to have a scheduled icebreaker virtual hallway chat, coffee-over-breakfast networking, or even a Zoom cocktail hour to help build relationships, especially if you have new members participating in governance or your alliance is new during the pandemic.

Perhaps the most important task for a hybrid meeting facilitator is to ensure that all participants have the opportunity to engage.

Also, be certain to start and end on time.[5] Most executives are tightly scheduled—even more so than they were before COVID. After all, no one has to walk from building to building for their next meeting!

ASAP Members Provide Insights on Facilitating in Hybrid Meetings

During the case study portion of the Master Class, participants were provided with a complex scenario in which a critical strategic decision had to be made that would significantly impact the ability of the fictional but realistic alliance in the case study to generate future value. The partners had very different perspectives on what would create the greatest value, setting up a challenging process of achieving alignment and winding up with a decision both partners would be happy with. Half of the participants were asked to consider how they would work with their counterpart to prepare to facilitate the meeting. The other half were asked how they would work with their executive/chairperson to prepare their members for the decision. Both were asked to consider the implications of hybrid meetings.

The participants who were asked about working with their counterpart to facilitate the meeting emphasized the rigorousness of the preparation required because of both the nature of the decision to be made and the challenges of the meeting. Their advice includes a mixture of meeting fundamentals and additional steps they would take because of the hybrid environment. A summary of their discussion is provided in Figure 2.

Working with Your Counterpart to Prepare Facilitation

Topic	Guidance from Master Class Participants
Participants	• Align meeting participants to ensure the people in the meeting can make the decision • Build a stakeholder interests map to help frame the meeting • Ensure all participants have met at least remotely and have some familiarity with each other
Agenda	• Align with your counterpart on objectives, premeeting deliverables, meeting rules • Review draft agenda with internal stakeholders and exchange notes on where it will be challenging to gain consensus • Build "light banter" time into the agenda • Build 10 minutes into the agenda at the end of the meeting to review actions and decisions
Building Alignment	• Identify where company interests may diverge • Line up functional premeetings to start to build consensus and surface the issues that will require careful facilitation
Facilitation Roles	• Decide between you and your counterpart who will do what, including monitoring the technology • Align on the ground rules for the meeting
Meeting Management	• Consider having all on individual video, from separate rooms, even if you have the ability to have some people together • Use translation/transcription functionality to help make sure people know what is being said • Take pauses in the discussion to give people a chance to unmute and contribute • Determine if it is OK to have people who are there to just listen

Figure 2

Enabling Excellence in Consensus Decision Making

Operational excellence for alliance management means active leadership of the decision-making process. Most strategic alliances seek consensus—a general agreement about something: an idea or opinion that is shared by all the people in a group. But consensus isn't just yes or no; there are different levels of consensus you can operate with:

- An unqualified "yes"
- Accept or live with the decision
- Do not fully agree with the decision; however, will not block it

It is always important to identify the critical assumptions that must be proven true for the decision to be the right or best decision and the data to track to get that answer. This is particularly true when one party or one important stakeholder has offered qualified acceptance of a decision.

Consensus isn't just yes or no; there are different levels of consensus you can operate with.

Of high(est) value to stakeholders is the alliance professionals' orchestration of complex decisions. Creating true consensus is a step-by-step process that doesn't just happen organically (see Figure 3). It begins with creating alignment around what would produce the "greatest value for the customers and partners." Necessarily, this involves consideration of the partners' individual strategic objectives for their partnership, which likely are not the same. Through a process of discovery and creating understanding, the partners should arrive at the outcome they believe will create the greatest value overall.

With that understanding, they must then frame the decision to make. It could be around the customer use case their product is to initially address (disease state and therefore patient population if a biopharmaceutical alliance), the go-to-market strategy, or any combination of the variables involved in achieving the "greatest value objective."

With a clear framing of the decision, the partners typically must seek guidance from their internal governance. This is an important step that cannot be overlooked. If it is, it is possible the ultimate alliance decision won't be supported internally and you are back to square one—having lost considerable valuable time.

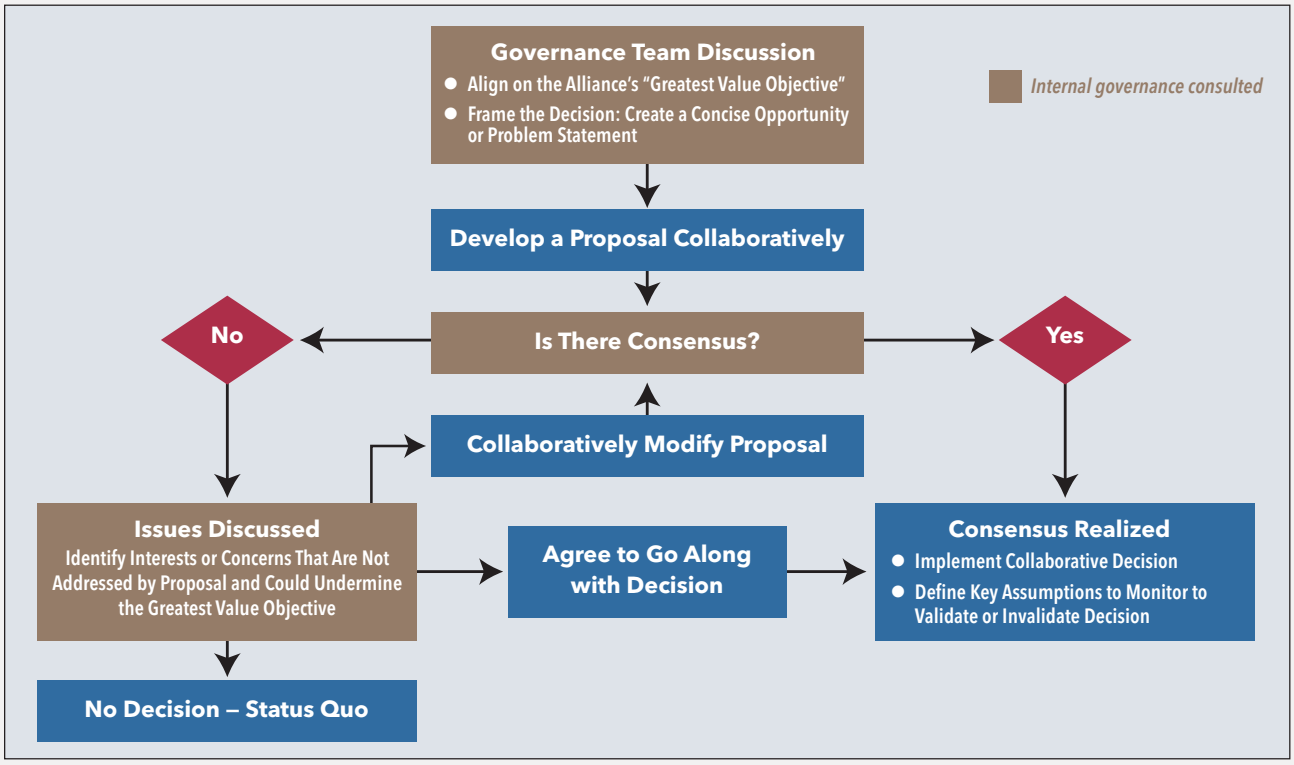


Figure 3

With a clear framing of the decision, the partners typically must seek guidance from their internal governance. This is an important step that cannot be overlooked.

Assuming you have that guidance, the partners collaboratively develop a proposal to address the question at hand. They then seek to identify if there is a consensus about the proposal, again looking back to internal governance. If yes, great! The collaboratively developed and agreed-to proposal is implemented.

If there is not consensus, the dissent must be interrogated to identify the dissenting partner's interests that are not being adequately addressed and a revised proposal developed. Care must be taken not to undermine what the partners have aligned on as being of greatest value, unless they agree that is not achievable and they reframe the objective. One of the dangers of consensus decision making is to suboptimize decisions to avoid protracted discussions on the assumption that the other party will "never go for something this bold."

The process of iterating through addressing interests and generating new proposals may require a few rounds. Care must be taken to appropriately address the cost of time. You don't want to keep iterating to the point of losing value greater than the value in the dispute or to give competitors a chance to get ahead. Reframe the objective, or one party must agree to go along so that the decision is made and implemented.

Preparing for a Complex Consensus Decision Process

Our Master Class participants who focused on preparing members for the decision offered a number of people-centric and process-related suggestions. In doing so, they reminded us all that this is a human endeavor and we must take care of human needs. For example, the case study had this important meeting occurring at 6:30 AM for many of the participants to balance the "time zone pain" as equally as possible across the globe. Before the pandemic, there would have been travel involved, so while there might be some significant jet lag, all would physically be in the same time zone. In the age of hybrid meetings, global travel is minimized and the impact of different time zones is at the forefront of meeting planning.

Hybrid meetings must be planned to balance the "time zone pain" as equally as possible across the globe.

Figure 4 provides a summary of Master Class participants' recommendations for preparing their members for the decision-making meeting.

Working with Your Executive/Chairperson to Prepare Members for the Decision

Topic	Guidance from Master Class Participants
Participants	• Ensure that 6:30 AM participants have a plan to be ready and alert at this early hour
Greatest Value Objective	• Establish an aligned internal perspective on the greatest value objective, mindful of being flexible for better ideas
Decision Process	• Align with your executive on the decision-making process (to be further aligned with your counterpart) so that everyone has the same expectations of how the meeting will progress
Alignment	• Work with your executive to solicit a list of all possible approaches with advantages and challenges of each prior to the meeting. Try to narrow the options through premeetings with your meeting participants
Meeting Management	• Hold a practice run to ensure that all meeting participants are comfortable with the platform and that all voices are heard • Provide meeting participants with a graphical "cheat sheet" to help them navigate the platform's interactive functions (chat, hand raising, etc.) during the meeting • Ensure that prereads are provided sufficiently in advance with specific guidance that they must be read, as the meeting will not be a presentation of the preread material

Figure 4

Driving Excellence, Enabling Value

There are many decisions to be made over the life cycle of an alliance. Most are small, and easily changed if they prove to be wrong. Every alliance faces a number of key decisions at critical value inflection points and for which it wants consensus among the partners—hopefully all-in consensus, not just qualified consensus. How those decisions are planned and considered, and how the meetings in which they are decided are conducted, demands operational excellence in alliance management at every level. It called upon alliance professionals' most sophisticated abilities when they could walk down the hall and consult with their executive or fly to their partner and spend a day planning with their counterpart. Those were the good old days! Orchestrating consensus on complex decisions in a hybrid meeting environment requires alliance professionals to take it up another notch and get a little bit better with every meeting. Our conference sponsor's executive roundtable and Master Class participants are leading the way.

***Jan Twombly**, CSAP, and **Jeff Shuman**, CSAP, PhD, are the principals of The Rhythm of Business, a provider of alliance management consulting, training, digitization, and assessment services to industry and academia. Twombly is a member of the ASAP board of directors and serves as ASAP's editorial chair. Visit www.rhythmofbusiness.com for the latest from* The Partnering Guide *blog, as well as whitepapers and presentations.* ■

[1]Jan Twombly and Jeff Shuman, "Seven Habits of Highly Effective Alliance Professionals Who Deliver Value," The Rhythm of Business, Inc., January 2021; https://rhythmofbusiness.com/blogv2.1/userfiles/files/Seven_Habits_of_Highly_Effective_Alliance_Professionals_Who_Deliver_Value.pdf.

[2]Arianne Cohen, "Think Before You CC," *Bloomberg Businessweek*, August 2, 2021.

[3]Andrea Alexander, Rich Cracknell, Aaron De Smet, Meredith Langstaff, Mihir Mysore, and Dan Ravid, "What Executives Are Saying About the Future of Hybrid Work," McKinsey & Company, May 2021.

[4]The recording of the presentation portion of the Master Class can be viewed at www.rhythmofbusiness.com.

[5]Meetings that start late are 10 to 50 percent worse than those that start on time. Joseph A. Allen, Nale Lehmann-Willenbrock, and Steven G. Rogelberg, "Let's Get This Meeting Started: Meeting Lateness and Actual Meeting Outcomes," *Journal of Organizational Behavior*, March 2018.

Tips on Making Your Hybrid Meeting a Success

In addition to following basic good meeting practices, there are a number of elements that are essential to conducting a successful hybrid meeting. Here are a few of the most impactful:

- **Team Agreement** – Similar to a charter, this is a series of simple, obvious, but critical protocols that everyone in a regularly scheduled alliance meeting—be it a project team, internal alignment, business review, or governance meeting—should agree to in order to help the meeting be successful in a hybrid environment.
- **Cameras On** – The lens keeps people in the meeting and provides some limited visual clues. Train people in speaking to the camera, not the screen. This is harder to do than one might think, but the only way to mimic in-person eye contact.
- **Leverage the Technology** – Learn to use chat, polling, breakout rooms, virtual whiteboards, and other collaborative tools to have people physically doing things, which creates a richer experience and helps keep them engaged.
- **High-Quality Audio** – "Can you hear me now?" As important as video is, clear audio is essential. Prioritize any tech investment in audio first.
- **Display Remote Participants** – If you have some people gathered and some people remote, have a big screen with the remote participants displayed in a way that everyone in the room can see them.
- **Equalize Engagement** – Bring remote participants into the conversation first; use a "seating chart" to keep track of who speaks and call on those who don't.
- **Minimize Slide Use** – Slide share is important to guide the discussion, but can force people off the screen. Share a few slides, then stop sharing during discussions so that people can have the gallery full-screen. Don't assume people have multiple screens.
- **Keep It Short** – Remote work has made many meetings shorter. Don't fall into default calendar settings. Think a 50-minute hour and 25-minute half-hour.
- **Have a Tech Buddy** – It is essential to have a "producer" who keeps an eye on the technology and participants' engagement so that the facilitator can focus on the meeting.

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As a practitioner of collaboration in a variety of perhaps non-traditional alliance functions myself, I've found so many key elements of partnering and collaboration management for synergistic outcomes were perfectly encapsulated by ASAP's offerings.

—Kevin Little, CSAP
Senior Partnership Director
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