

BUILDING STRATEGIC ALLIANCES

FACILITATOR'S GUIDE
by Robert Porter Lynch



Building Strategic Alliances

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Building Strategic Alliances



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Building Strategic Alliances

ABOUT ALLIANCES

The Facilitator must know something about alliances and what makes them function effectively. The following definition will be helpful in understanding why the best practices in the program have been identified.

Alliance Definition

The term “alliance” is used by many organizations to encompass a broad spectrum of relationships. For the purpose of this Facilitator’s Guide, our definition of an alliance is

a close, collaborative relationship between two or more entities that share complementary assets and strengths to accomplish something or create increased value for their customers and their own organizations that could not be accomplished independently.

Some characteristics of a typical successful alliance include:

- Synergy in the relationship contributing to a powerful value proposition;
- Mutually compatible goals that would be difficult for each to achieve alone;
- Expectations of sharing the rewards and risks inherent in the relationship;
- Terms of the alliance agreement are incomplete because of future uncertainties;
- A governance structure is established to conduct joint decision-making and to deal with conflict resolution;
- Each organization is looking out for the interest of the other organization and the alliance as a whole;
- Champions are designated by the involved organizations;
- Operational unit support is achieved and aligned at multiple levels;
- There is a long-term view to the relationship; and,
- Joint planning is used to innovate and evolve the alliance to the next stage

Alliance Characteristics

An alliance should embody the spirit and essence of the following characteristics to improve its likelihood of success. Any alliance missing these characteristics will likely be beset with problems.

Use these characteristics as a checklist to assess current and prospective alliances. Any missing characteristic should be considered a danger sign.

- ✓ **Synergistic** (1+1>3) --Powerful Value Proposition - Combining of organizational strengths is multiplicative, resulting in a far superior value proposition.

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- ✓ **Mutually Aligned Goals** - Investments by both organizations result in greater returns when goals are aligned.
- ✓ **Strategic** - Affects long term destiny - determines whether relationship will be strategic, long lasting, or tactical, limited time period.
- ✓ **Champion** - A Senior leader is designated to support and promote the alliance.
- ✓ Operational Unit Support is assured by the Champion.
- ✓ **Tight Operating Linkages** - Governance Structure is put into place for joint decision making, problem solving, conflict resolution and planning.
- ✓ **Interaction at Multiple Levels** - while the champion will interface at the senior levels, all functional areas should have corresponding interfaces to ensure smooth operational implementation.
- ✓ **Collaborative** -- Win-Win is an expression used to imply that both organizations are committed to achieving above average results for the alliance as a whole. In so doing each organization will benefit to a greater degree than they would have if they had operated in their own best interests.
- ✓ **Reciprocal Relationships** --
 - Shared Assets
 - Sharing Strengths & Information
 - Shared Risk & Reward
- ✓ **Regenerative**
 - Renewing contract or agreement
 - Adapting Strategy to Competitive Environment



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PART 1 – LEARNING METHODOLOGY

CAPABILITY BUILDING – WHAT WE’VE LEARNED

Since beginning capability building programs in 1989, and having had over 30,000 people attend our alliance, innovation, and trust programs in a variety of formats, we have learned some critical things:

It's not about the “Training of Individuals:” Building Capabilities in an organization means Coaching of Alliance Implementation Teams to Use Best Practices in Real Life Situations.

This requires giving the *teams* Tool Kits, Sound Advice, Redirection when off course, and insisting on Immediate Application.

Teaching Concepts, Case Studies, and holding Seminars have not proven to be effective as Capability Building mechanisms. These approaches are too abstract, and too distant from the pressing real-life issues of business. We have found that any concept, which cannot be directly tied to a best practice and a tool kit, is far too academic for the business world.

Capability Building is a multi-dimensional learning system – one learns not just to “know” but also to “think anew, understand deeply, and to do.”

It’s About Application: The issue of Immediate Application is of Vital Importance to a Capability Building Program.

When participants attend a seminar without immediate or direct applicability, studies verify that the participants forget 80% of what they learn within 3 weeks.

However, if participants can use the material immediately in a real life application, they will retain 80% of what learned three weeks later.

The result of this type of capability building yields dramatically positive results, as reflected in feedback:

“Definitely had the ‘WOW’ factor”

“Excellent materials, Interesting, lively and valuable, Great info! Like the breakdown of concepts, best practices, toolkits, and the use of real world companies as examples adds credibility.”

“Really made us get our creative juices and ideas flowing”

“The session was a real winner, now momentum and continued improvement are key.”

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“Thanks for the great two days you invested with us. I am sure this will pay off in the near future by creating a long term”

“Thanks for a wonderful session - It was intellectually rewarding and exposed me to real-world tools that we are applying now to my alliance team.”

“The program's value has been enormous. I refer to the notebook frequently, two years later. I immediately used the information to revitalize our alliance, and our relationship has blossomed since, and lot was taken from your work. The investment has paid back in spades.”

Providing Advanced Materials at the outset is a definite advantage. Nearly all participants are capable of digesting sophisticated ideas and practices, if properly presented.

Action Learning: The “Applied Learning” System composed of four basic elements:

AWARENESS Shift: Participants see that a new Mindset, Strategy, or Key Factor for Success is a powerful factor in producing superior performance/results.

New Beliefs and New Attitudes are manifested, while Creating Dissatisfaction with the Current Condition because the Possibilities for a Bold New Future are much more attractive

ARCHITECTURE:

A highly successful pathway to the bold new future using Best Practices, Tool kits, and Action Plans is Co-created by those whose future is at stake

APPLICATION

of the new attitudes and architecture to a real life situation that has a reasonably high likelihood of being a success even with the limited experience and skill set of the team, which has come into alignment on the value of the idea and the method to get there.

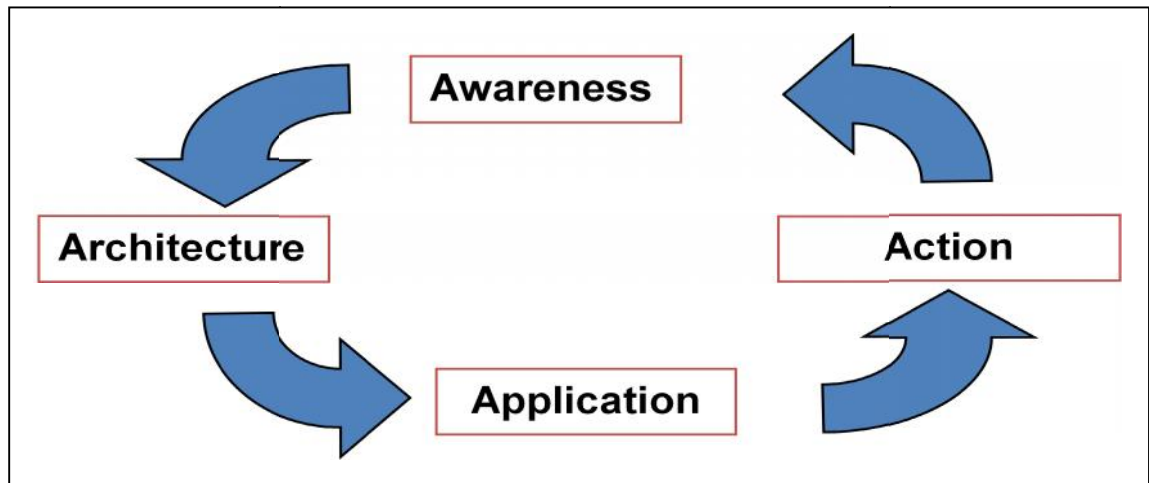
ACTION

Produces a Result that, while not yet perfect, will reinforce the beliefs in the new future and invigorate the team to expand its reach while convincing others to join the effort.

The Result produces a feedback loop that either confirms, readjusts, or realigns the Awareness of what is possible and how new possibilities will be achieved, producing a stronger and more effective Architecture.



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Knowledge and information versus Wisdom: Much of our educational system is based on "the bucket" principle – the brain is a “bucket to be filled with knowledge and information.” But true wisdom comes through putting to question all received knowledge – and testing that understanding against deeper insights, consequences of actions, broken paradigms, and best/next (“bext”) practices.

Why? Because "knowledge" is not neutral, it embodies existing belief systems, presumed truths, and cultural practices and prejudices, along with baggage, vested interests, and power structures that inherently resist change and innovation. Wisdom embodies knowledge, but also compassion, vision, holistic understandings, human behavior, and a sense of timing. Capability Building’s aim is not the impartation of knowledge, but the generation of wisdom.

Alliance Specialists are Integrators & Champions: Those who are well suited to being alliance specialists have a combination of two fundamental characteristics:

They are integrators, being able to bridge the different cultures, business models, and strategies of both companies, while maintaining a powerful chemistry trust and integrity. This is primarily a management skill.

They are champions who are firm believers, advocates, team builders, and visionaries. When difficulties arise, the champions intercede together to fix problems and make adjustments to maintain competitive advantages for the alliance. This is fundamentally a leadership skill.

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COMPETENCIES ADDRESSED

For BC Public Service the competencies addressed in the course include important factors such as

- Strategic Planning
- Trust Building,
- Collaborative Leadership
- Developing Networks
- Managing Complex Organizations

These “generic” competencies are not job-specific or Ministry-specific. For example, a manager of an IT group must have specific competencies in data systems that are not applicable to a person who is a HR specialist. The competencies addressed in this course are universal and can be applied to alliances, new initiatives, teams, and private public partnerships.

Effective delivery of government services, response to emerging needs, and development of coordinated policies is highly dependent on forming and using strategic relationships and transforming other adversarial relationships into collaborative ones. This session provides participants with the opportunity to work on their own “real world” examples; applying proven best practices to form, manage, regenerate and innovate the strategic relationships in their organizations. Participants work interactively, applying the most effective principles and methodologies with other organizations resulting in the development of actionable plans to achieve breakthrough results.

Best Practice Architectures

We closely tie competencies to specific “Best Practice Architectures.” Practices are the behavioral connection to each of the competencies. A competency that is not directly linked to the highest standards of best practices will falter in the field of action.

Best Practice Architectures are systems, methods, structures, processes, principles, and mindsets that, holistically, bring forth the competency. A competency that is not manifested through a holistic architecture will be fragmentary, ineffective, and even counter-productive. For example, most training in “trust” is so superficial as to be ineffective, based too much on admonitions, aphorisms, or poorly researched analysis. Our best practice architecture is grounded in science, strategy, economics, and social theory. .

Organizational Support and Leadership

If senior executives in an organization do not actively support the new competencies, people won’t use the competency, or may actually revert to incompetent behavior. If the competency is delivered into a hostile or unsupportive environment, it will be rejected.



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It is imperative that senior executives support, model, and embrace the new competency as a prerequisite to any new competency delivery. This is emphasized throughout the program.

Team-based, Application-Focused Training

Using case-study methods for training adults past the age of thirty usually does not have a profound effect on organizational effectiveness.

People learn best in the work-teams that are natural to their performance. Taking people out of their work-team structures usually means they learn in an unnatural, hypothetical environment, yearning for their teammates to learn with them. All high-performance teams should be trained together.

In addition, while there is nothing inherently wrong with case studies, it is not the most effective training vehicle. People learn best when they apply the learning to real-life situations. Studies show that if a person learns something and can apply it immediately, they will remember 80% three weeks later. But if they cannot apply it immediately, they will forget 80% three weeks later.

Alignment of Metrics & Rewards

Once people are introduced to a new competency, it is essential that their work environment reinforce the new competency by modifying the organization's measures and rewards to align with the new competency.

For example, if a person learns a new trust model for relationship competencies, but their host organization still measures and rewards cut-throat tactics, the training may actually be counter-productive. Most organizations never pay attention to this factor.

Root Cause Analysis

Getting individuals and teams to perform effectively is not just a matter of competencies, because old habits die hard, and can take years to eradicate, in spite of competency training.

Unless senior executives are willing to dig deeply into why their organization is not functioning at world-class standards, dysfunctional behavior will perpetuate itself.

Study after study shows that the large majority of work in organizations adds no real value. Unless senior executives are willing to ferret out non-value added work, the emphasis on competencies is hollow.

Alliances, Networks, Cross Boundary Integration & Competitiveness

More and more, because of the complexity of work today, the need for integration across internal silos or external organizational structures is more

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and more critical. This calls for special integrative competencies, rewards, and measures.

All organizations must innovate or die. Competitive advantage is the mainstay of sustainability. Competitiveness is more than just a competency, it's a state of mind, a way of being, a mindset about how to continue to recreate oneself. This is almost always overlooked in competencies.

Action Learning

In addition to being team-based and real-world focused, the best learning methodologies involve multiple aligned inputs into one's brain, including readings, presentations, and, rapid/relevant application.

The session provides participants with the opportunity to work on their own "real world" examples; applying proven best practices to form, manage, regenerate and innovate strategic relationships between their organizations. Participants work interactively, applying the most effective principles, best practices, and methodologies with other organizations resulting in the development of actionable plans to achieve breakthrough results.

These methods should then all be reinforced by a "project-based" application where the learning team applies what was learned in the classroom to a short or medium term project (typically 1 week to 6 months in length) that enables the team to experiment with new mindsets and skillsets that test whether the new behaviors actually produces the expected result.

Teamwork

Learning about alliances has a major benefit: it teaches about high performance teamwork across ministries.

Most organizations rely heavily on *collaboration* – within teams, across functional units, or in alliances – as a means of producing results at multiple levels in their organization. Trust is essential because it is the foundation of *all* collaborative enterprise and considered the #1 factor in high performance teamwork.

Working co-operatively and productively with others, both individually and in teams, is becoming more critical for successful organizations. The use of teams to build commitment, enhance productivity, and integrate organizational change will be examined as a key strategy to sustain the vibrancy within your organization and to position it to successfully adapt to continuous change.

Years of in-depth work in building, managing, and repairing collaborative ventures has culminated in an Architecture of Trust that will produce highly effective internal teams and cross-boundary relationships. This



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breakthrough architecture can be systematically implemented replicated, diagnosed, and taught to executives, technical people, and staff personnel, to produce consistent results.

This workshop applies the best practices of trust and high performance teamwork and how these can be used in order to build collaborative relationships in order to achieve outstanding results.

Participants gain the ability to improve team performance, gaining new ideas, rich experiences, and the confidence to approach these challenges when returning to their organization.

Finding Meaning & Purpose

Lastly, of all the factors that truly help create high-performance organizations, being able to make a difference stands at the pinnacle. People want their work to be meaningful, filled with learning, adventure, and fulfillment.

Two things tend to contribute to this more than anything else:

Leadership able to articulate a vision, value proposition, and strategy that truly creates an organization that has world-class standards and honorable purpose

Leadership dedicated to building a culture of trust, respect, and collaborative innovation, thus creating high performance teams that continually improve the way the organization relates to its customers, suppliers, stakeholders, and environment.

Teach in three dimensions

Dimension 1 — Work on the Inner Awarenesses:

Beliefs, Perceptions, Vision, Possibilities

Dimension 2 — Work on their Strategic Architecture:

Knowledge, Processes, Frameworks, Language, Best Practices

Dimension 3 — Work on their Applications & Actions:

Leverage Points for Change, Skills, Behaviors



ADULTS LEARN DIFFERENTLY

How Adults Learn

Executive Development is not an Advanced Masters Degree program. In fact, those who have tried to “teach” adults like students in graduate school have failed dismally. The reason is because adults already come pre-wired with solid experiences.

It is against this backdrop of experience that what is presented to them is weighed and assessed. If the material doesn’t seem true or relevant, it is rejected or downgraded.

Statistics show that unless something is immediately applicable, eighty percent will be forgotten within three weeks. However, if it is applicable and relevant, the reverse is true: eighty percent will be remembered three weeks later. These statistics have major implications on program design and value perceived.

Years later, participants remark how the “architecture” (frameworks, processes and practices) and the new language to express what they already “knew” (but could not articulate) made them far better leaders. They finally could take what had been intuition and put it into both words and actions.

Value of Workshop Format

The “Building Strategic Alliances” program is designed to ensure that in every module there are opportunities for the participants to engage in direct application of the concepts and best practices.

Participants are arranged in self-selected teams with others who share common problems and issues, and with whom they want to create a real strategic relationship. At least every hour, participants apply the concepts and practices presented to real life situations. For this reason, we do not use case studies which run the risk of not being relevant.

Thus, at the end of each module, the components of an action plan created, and, at the end of the two day session, all the action planning components represent an entire plan.

Public Sector Context

Public sector participants are typically highly motivated to improve themselves and be more effective as public servants. They want to increase their personal capabilities and at the same time find deeper meaning and purpose in their work. This course focuses on building capability and gaining insight into creating value for those they serve.

There is an old adage: *Where there is no vision and policy, everything defaults to politics and protection.* For this reason, having a better handle on strategic vision and value becomes an important means of offsetting the political wrangles of their job.



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Much of today's work in the public sector also requires interaction with non-governmental organizations (NGOs) and private sector companies. Therefore we do not artificially impose an exclusion of these organizations in the context program if a strategic relationship is the appropriate vehicle.

Best Practices Foundation

In the course, we focus on the best practices in strategic alliances and collaborative relationships that produce excellence. No concept is presented that doesn't have a clear and well tested best practice.

With each best practice, a "toolkit" is provided to enable the most efficacious application to a real world situation.

Because best practices show no sector boundaries, private and public sector examples are interwoven throughout the course. All the practical applications for each module enable the best practice to be applied to the participant's public sector situation.

It has been amply demonstrated that best practice usage will improve the chances of a successful strategic relationship by double or triple.

Nature of Complex Organizational Relationships

Today every public official is faced with having to interconnect with a myriad of organizations, including their internal divisions, other ministries, municipalities, crown corporations, NGOs, and private sector corporations, among many others.

What is unique about these interactions is that the public servant has no actual control over any of these interrelationships – only their own personal skills to influence thinking and action indirectly.

In this course, we build capabilities to understand, influence, and effectively respond to these issues from a strategic perspective, rather than make "deals" or revert to political influence.

Executives, whether in Government or Business, are faced with an ever-increasing need to build relationships and negotiate in complex organizational situations across a multitude of organizations, stakeholder groups, and special interests. These groups often pull a senior executive or manager in many directions as multiple constituencies make seemingly irreconcilable demands. To thrive in an increasingly interconnected world, more than a personal or political relationship is required.



PART 2: PROGRAM DELIVERY & CONTENT

COURSE LEARNING OBJECTIVES:

BUILDING STRATEGIC ALLIANCES aims at creating a new destiny -- a bold new future, or alter the paths of the expectations of constituencies and stakeholders – for existing organizational relationships, while also improving the quality of the journey, thus making our organizations more inter-connected and aligned, both internally and externally. This course is aimed at those leaders who truly want to make a difference.

Based on the practical application of best practices, attendees will be enabled to create *greater alignment* both within their own organizations and across a wide variety of external organizational boundaries, *develop powerful strategic alliances*, and *harmonize differences* between individuals and groups.

This session is practical and results oriented. Participants will apply strategies, best practices, and tools to their current “real world” relationship opportunities and problems. Attendees will be encouraged to bring other members of their team or outside stakeholders to the session.

After finishing this program, participants will be able to:

- Create Value in an Alliance using the 3-Dimensions of Alignment
- Identify Driving Forces affecting the alliance
- Develop a Value Evolution Strategy
- Create a Powerful Value Proposition
- Identify the Source of Trust
- Build a Set of Operating Principles to Sustain Trust
- Actualize Champion Leadership Behavior
- Negotiate an Alliance
- Manage Alliances in a Complex Organizational Environment



Building Strategic Alliances

Course Outline

Day One: Strategy & Trust

Part 1. Developing the Strategy and Value of an Alliance

- Analyzing a Relationship
- Optimizing the Relationship
- Understanding Strategic Driving Forces
- Value Migration and Value Building
- Developing a Shared Vision
- Creating a Breakthrough Value Proposition
- The Power of Metrics to focus strategy

Part 2. The Architecture of Trust

- Trust & Human Nature
- Four Drivers of Behavior
- Ladder of Trust
- Eight Principles of Trust
- Building a Team You Can Trust
- Economics of Trust

Day Two: Leadership, Negotiations and Management

Part 3. Critical Leadership Issues

- Leadership versus Management
- Essential Leadership Roles in a Strategic Alliance
- Champions
- Executive Support Roles
- Integrator Roles

Part 4. Negotiating a Strategic Alliance

- Three Negotiations Options
- Mapping Positions, Interests, and Vision
- Mastering Co-Creative/Synergistic Negotiations
- Impact of Trust and Expectations on the Negotiations
- Tools for Building Trust

Part 5. Managing Strategic Alliances in Complex Organizations

- Building a Breakthrough Culture
- Handling Differences, Cynics and Skeptics
- Conflict & Collaboration
- Metrics & Rewards
- Seven Laws of Change
- Managing Alliances in conditions of ambiguity & uncertainty
- Predicting and Handling Breakdowns



Master Prep Sheet for Facilitators

Several Days Prior to the Workshop

- Confirm Location
- Obtain Class list for participants to sign in
Bring this to class. One copy is for the facilitator and the other as a sign in sheet.
- Reconfirm Class Location, Hotel Accommodations, etc.
- Map

Day Prior to the Workshop

- Venue address, map and contact coordinated
- Flip Charts for each team (4 people per team)
- Visit room to determine layout and facilities
- Determine Lunch facilities for the participants
- If off site, ensure that all materials have been delivered

Day 1 of Workshop

- Check room set up, seating for small group exercises, clear directions to room
- Greet people who arrive early, get to know the people in advance
- Be sure there is coffee available
- Distribute name tags, post it notes and sharpies
- Prep flipcharts
- Find washrooms, safety exits, evacuation routes and muster station
- All participants sign in

Day 2 of Workshop 1

- All participants sign in
- At beginning, tell people what to expect
- Collect Sign-in Sheets and materials – send back to headquarters



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Agenda Timing

Note: All times are Approximate

Day One: Strategy & Trust

Start	Activity	Time Required
8:30	Introduction by Instructor	20-30 min
9:00	Introduction of Participants	30 min
9:30	Divide Into Teams	5 min
9:35	Ladder of Cooperation Exercise	10 min
9:45	Debrief of Ladder of Cooperation	10 min
9:44	PART 1 STRATEGY	
9:55	Three Dimensional Fit	5 min
10:00	Three Dimensional Fit Exercise	10 min
10:10	Debrief of Three Dimensional Fit	5 min
10:15	Break	10 min
10:25	Change, Speed, Complexity Graph	7 min
10:32	Debrief Change, Speed, Complexity	12 min
10:45	Strategy in Context of Time	10 min
10:55	Analysis of How Time is Spent	10 min
11:05	Debrief of Time Analysis	5 min
11:10	Strategic Driving Forces	5 min
11:15	Analysis of Driving Forces Exercise	15 min
11:30	Debrief of Driving Forces Exercise	10 min
11:40	Catch-up Time (you are probably behind schedule at this point)	
12:00	Lunch	1 hour
1:00	Value Evolution Overview	20 min
1:20	Value Evolution Exercise	30 min
1:55	Value Evolution Presentations	15 min
2:10	Building Shared Vision Overview	10 min
2:20	Shared Vision Exercise	5 min
2:25	Debrief Shared Vision Exercise	5 min
2:30	Break	10 min

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2:40	Value Proposition Overview	20 min
3:00	Value Proposition Exercise	20 min
3:20	Value Proposition Presentations	15 min
3:35	PART 2: TRUST	
3:35	Ethics and Trust	5 min
3:40	Analysis: Is Trust a Natural Act	5 min
3:45	Deep & Fuzzy Distrust	10 min
3:55	Four Drives of Human Behavior	10 min
4:05	Hormonal Effects on Behavior	5 min
4:10	Ladder of Trust	15 min
4:25	Wrap-up	5 min

Day Two: Trust (cont.) Leadership, Negotiations, & Management

Start	Activity	Time Required
8:30	Identify 3-5 Take-Aways from Day 1	10 min
8:40	Revisit Ladder of Trust – Discussion	10 min
8:50	Impact of Culture on Human Behavior	10 min
9:00	Ladder of Trust & Culture Exercise	10 min
9:10	Debrief Ladder of Trust & Culture Exercise	5 min
9:15	Eight Principles of Trust	15 min
9:30	Alliance Operating Principles	15 min
9:45	Operating Principles Exercise	15 min
10:00	Debrief Operating Principles Exercise	5 min
10:05	Break	10 min
10:15	Economics of Trust Exercise	20 min
10:35	Debrief Economics of Trust	10 min
10:45	Value Creation & Well Being	5 min
10:50	Building the High Trust Team	10 min
10:55	Trust Wrap-up	5 min



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11:00 PART 3: LEADERSHIP

Start	Activity	Time Required
11:05	Obstacles to Collaboration Exercise	5 min
11:10	Leadership, Champions & Courage	30 min
11:40	Alliance Leadership Exercise	10 min
11:50	Debrief Leadership Exercise	5 min
11:55	Wrap up Leadership	5 min
12:00	Lunch Break	1 hr

1:00 PART 4 NEGOTIATIONS

1:05	Negotiations Most Difficult Issues Exercise	10 min
1:15	Negotiations: 3 Models	25 min
1:40	Healthy & Unhealthy Negotiations	5 min
1:45	Imagineering the Future	5 min
1:50	Shifting the Perspective	10 min
2:00	IMPACT Framework Exercise	15 min
2:15	Negotiations Wrap-up	5 min

2:20 PART 5 MANAGING IN COMPLEX ENVIRONMENTS

2:25	Breakdowns into Breakthroughs	5 min
2:30	Building the Breakthrough Culture	10 min
2:40	Leading the Shifts	10 min
2:50	Linking Metrics, Rewards, & Vision	5 min
2:55	Break	10 min
3:05	Ambiguity – Uncertainty Continuum	15 min
3:20	Conflict & Collaboration Exercise	15 min
3:35	Breakdowns & Contingencies Exercise	15 min
3:50	Principles of Change	5 min
3:55	Leaders do 3 Things Well	5 min
4:00	Taking the Plan back to Work	15 min
4:15	Sharing Plans	10 min
4:25	Wrap-Up	5 min
4:30	Finish	

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LESSON SETUP FOR EACH MODULE

Note: The manner in which each facilitator interacts with the participants can vary dramatically from person to person. Rather than try to give micro-managing guidance (which can be confounding and overly repetitive, please refer to:

Part 3: refer to How to be an Empowering Workshop Facilitator

INTRODUCTION TO STRATEGIC ALLIANCES

- 8:30 Introduction by Instructor 20-30 min
- Housekeeping
- Washroom locations
 - Parking and other venue issues
 - Emergency information (fire exits and meeting place), in case of earthquake
 - Refreshment rules (money saved in refreshments allows us to train across the province)
 - Breaks , Temperature, Unscented products
 - Cell phone policy
 - Confidentiality
 - Being on Time & Synchronicity
- Instructor Setting the Stage for the program
- Who is the Instructor
 - Why this program is relevant
 - Where Alliances can be used
 - When will you need this
 - What will we cover
 - How will we work together in teams during the next two days
 - What you will do with the outputs

Slide Titles Used (see notes section of each slide for detailed info):

Capability Building	#2
Strategic Alliance Architecture & Tool Kit	#3
Agenda	#4
Program Structure	#5
Interconnected Networks Need Alliances	#6

- 9:00 Introduction of Participants 30 min
- Each person Introduce themselves by Name, Title, Job Position and what Problem, Issue, or Opportunity brought them to the class.
 - Important: Explain every person MUST listen closely to each of the introductions to determine who has a situation, need, or potential alliance or joint initiative that must be formed.

Slide Titles Used: None



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9:30	Divide Into Teams <ul style="list-style-type: none"> • All participants form stand up, reseal yourselves in teams of 3-6 people, clustered around a common issue, problem, difficulty, or opportunity. • Give people time to get acclimated and introduced 	5 min
9:35	Ladder of Cooperation Exercise Slide Titles Used: <p style="margin-left: 40px;">Ladder of Cooperation</p> Key Points: See Slide Notes	10 min
9:45	Debrief of Ladder of Cooperation Ask: <ul style="list-style-type: none"> • What did you see/experience? • Why is this important/valuable/necessary? • How would/could you use this in the future? Key Point: All life is a choice – chose wisely and consciously	10 min
PART 1. DEVELOPING THE STRATEGY AND VALUE OF AN ALLIANCE		
9:55	Three Dimensional Fit Slide Titles Used: <p style="margin-left: 40px;">3-Dimensional Characteristics</p> Key Points: See Slide Notes	5 min
10:00	Three Dimensional Fit Exercise Slide Titles Used: <p style="margin-left: 40px;">Holistic Evaluation 3-D Alignment</p>	10 min
10:10	Debrief of Three Dimensional Fit Ask: <ul style="list-style-type: none"> • What did you see/experience? • Why is this important/valuable/necessary? • How would/could you use this in the future? Key Points: Seeing your organization and the potential partner’s organization from a realistic perspective will help future success	5 min
10:15	Break	10 min
10:25	Change, Speed, Complexity Exercise	7 min

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	Slide Titles Used:	
	What’s Happening Now	#12
	Key Points: See Slide Notes	
	Have Slide #127 ready to display	
10:32	Debrief Change, Speed, Complexity	12 min
	Display Slide #127 which maps the shifts	
	Ask:	
	• What did you see/experience?	
	• Why is this important/valuable/necessary?	
	• How would/could you use this in the future?	
	Key Points: The organizations of today weren’t designed to function at the speed of change of today’s rate of change. Trust is essential. Alliances are essential in a world that is interconnected.	
10:45	Strategy in Context of Time	10 min
	Slide Titles Used:	
	Strategy in Context of Time	#13
	Response Modes in Context of Time	#14
	Key Points: See Slide Notes	
10:55	Analysis of How Time is Spent	10 min
	Slide Titles Used:	
	Organizations in Context of Strategy	#15
	Key Points: See Slide Notes	
11:05	Debrief of Time Analysis	5 min
	Ask:	
	• What did you see/experience?	
	• Why is this important/valuable/necessary?	
	• How would/could you use this in the future?	
	Key Points: How can an organization that spends all its time reactively be a solid alliance partner that aims at the future.	
11:10	Strategic Driving Forces	5 min
	Slide Titles Used:	
	Strategic Force Field Analysis	#16



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	Strategic Driving Forces Checklist	#17
	Key Points: See Slide Notes	
11:15	Action Plan: Strategic Driving Forces Exercise	15 min
	Slide Titles Used:	
	Strategic Driving Forces	#18
	Key Points: See slide notes	
11:30	Debrief of Driving Forces Exercise	10 min
	Ask:	
	<ul style="list-style-type: none"> • What did you see/experience? • Why is this important/valuable/necessary? • How would/could you use this in the future? 	
	Key Points: Driving Forces are a primary determinant of Behavior	
11:40	Catch-up Time (you are probably behind schedule at this point)	
	(Note: getting in tune with the rhythm and timing of every class is different. More often than not, I'm behind at this point. This 20 minute period is a phantom to enable you to have a chance of catching up.)	
12:00	Lunch	1 hour
1:00	Value Evolution Overview	20 min
	Slide Titles Used:	
	Value Evolution	#19- 22
	Key Points: See Slide Notes	
1:20	Action Plan: Value Evolution Exercise	30 min
	Slide Titles Used:	
	Checklists & Action Planning	#23-26
	Key Points: All Teams Develop Presentation	
1:55	Value Evolution Presentations & Debrief	15 min
	Ask:	
	<ul style="list-style-type: none"> • What did you see/experience? • Why is this important/valuable/necessary? • How would/could you use this in the future? 	
	Key Points: This is one of the most important exercises because it enables a powerful vision of the future. Declining value streams cause reactions from vested interests.	

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2:10	Building Shared Vision Overview	10 min
	Slide Titles Used:	
	Building Shared Vision	#27-29
	Key Points: See Slide Notes	
2:20	Analysis: Shared Vision Exercise	5 min
	Slide Titles Used:	
	Rate the Common Vision	#30
	Key Points: See Slide Notes	
	Instructor note: this exercises can go for a long time if you let it. Don't go over 10 minutes or you'll be in the weeds for the rest of the day	
2:30	Break	10 min
2:40	Value Proposition Overview	20 min
	Slide Titles Used:	
	Empowering Value Proposition	#31-47
	Key Points: See Slide Notes	
3:00	Action Plan: Value Proposition Exercise	20 min
	Slide Titles Used:	
	Value Proposition Checklist & Exercise	#48-49
	Key Points: See Slide Notes	
3:20	Value Proposition Presentations	15 min
	Special Instructions: Each team selects one champion to “declare” the value proposition. Dress Rehearsal: Run through 1 st time go smooth out the presentation. Final: Instructor tells everyone to raise their hand when the spokesperson “triggers” their interest. Instructor times each presentation.	
	Ask:	
	<ul style="list-style-type: none"> • What did you see/experience? • Why is this important/valuable/necessary? • How would/could you use this in the future? 	
	Key Points: Metrics Motivate the mind to action. Value propositions typically take 10-20 seconds to articulate – 30 second elevator speech.	
3:33	Five Strategic Principles	2 min



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Part 2: Architecture of Trust

3:35	Ethics and Trust	5 min
	Slide Titles Used:	
	Ethics & Trust are not the same	#53
3:40	Analysis: It Trust a Natural Act	5 min
	Slide Titles Used:	
	Analysis: Trust as a Natural Act	#53
	Key Points: Trust is a Natural Act, Distrust is a learned behavior	
	Instructor Note: Do this as a “whole room” exercise	
3:45	Deep & Fuzzy Distrust	10 min
	Slide Titles Used:	
	Deep & Fuzzy Distrust	#54-57
	Key Points: See Slide Notes	
3:55	Four Drives of Human Behavior	10 min
	Slide Titles Used:	
	Four Drives	#58
	Key Points: See Slide Notes	
4:05	Hormonal Effects on Behavior	5 min
	Slide Titles Used:	
	Hormonal Effects on Collaboration	#59
	Key Points: See Slide Notes	
4:10	Ladder of Trust	15 min
	Slide Titles Used:	
	Ladder of Trust	#60
	Key Points: See Slide Notes – End the day here with more points to ponder	
4:25	Wrap-up	5 min

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Day Two: Trust (cont.) Leadership, Negotiations, & Management

8:30	Identify 3-5 Take-Aways from Day 1 Slide Titles Used: None Ask: <ul style="list-style-type: none"> • What were the Highlights from Yesterday • Each team identify 3-5 takeaways Debrief: Each team report out its insights	10 min
8:40	Revisit Ladder of Trust – Discussion Slide Titles Used: Ladder of Trust Key Points: See Slide Notes Instructor Note: This is a High Impact Slide with lots of discussion point	10 min #60
8:50	Impact of Culture on Human Behavior Slide Titles Used: Exploring the Causative Layers Key Points: See Slide Notes	10 min #61
9:00	Ladder of Trust & Culture Exercise Slide Titles Used: Analysis: Ladder of Trust & Culture Key Points: See Slide Notes	10 min #63
9:10	Debrief Ladder of Trust & Culture Exercise Ask: <ul style="list-style-type: none"> • What did you see/experience? • Why is this important/valuable/necessary? • How would/could you use this in the future? Key Points: Trust, Culture, & Leadership are essential Culture is a major determinant of human behavior These are Pivotal issues to Alliance Success	5 min
9:15	Eight Principles of Trust Slide Titles Used:	15 min



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	Eight Principles of Trust	#64-74
	Key Points: See Slide Notes	
	Instructor Notes: If running behind, cover slides 66-74 superficially, as “background” to be used for the upcoming exercise	
9:30	Alliance Operating Principles	15 min
	Slide Titles Used:	
	Values & Operating Principles	#75-79
	Key Points: See Slide Notes, Link BC Values to Alliance Operating Principles	
9:45	Action Plan: Operating Principles Exercise	15 min
	Slide Titles Used:	
	Operating Principles	#80
	Key Points: See Slide Notes	
10:00	Debrief Operating Principles Exercise	5 min
	Ask:	
	<ul style="list-style-type: none"> • What did you see/experience? • Why is this important/valuable/necessary? • How would/could you use this in the future? 	
	Key Points: Alliances & Teams build a foundation of Trust when they solidify their alliance principles	
10:05	Break	10 min
10:15	Analysis: Economics of Trust Exercise	20 min
	Slide Titles Used:	
	Economics of Trust	#81-82
	Key Points: See Slide Notes	
	Instructor Note: While participants are examining the economic impact of trust exercise, prepare a flip-chart that will record each team’s average high, average low, and differential. As teams finish the exercise, record the data, then compile the final “differential” between Ave. Hi and Ave Low. Typical differentials are 130 (business) 150 (government)	
10:35	Debrief Economics of Trust	10 min
	Ask:	
	<ul style="list-style-type: none"> • What did you see/experience? 	

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- Why is this important/valuable/necessary?
 - How would/could you use this in the future?
- Key Points: Trust creates a MASSIVE competitive advantage

10:45 Value Creation & Well Being 5 min

Slide Titles Used:

Value Creation & Well Being #83-84

Key Points: See Slide Notes
 Instructor Note: The Application of the Economics of Trust to Lean Management, Employee Turnover is enormous

10:50 Building the High Trust Team 10 min

Slide Titles Used:

Build the High Trust Team #85-86

Key Points: See Slide Notes

10:55 Trust Wrap-up 5 min

Slide Titles Used:

Why Trust is Important #87-88

Key Points: See Slide Notes, Trust is a 'Force Multiplier'

Part 3: Critical Leadership Issues

11:05 Obstacles to Collaboration Exercise 5 min

Slide Titles Used:

Analysis: Obstacles to Collaboration #90

Ask:

- What did you see/experience?
- Why is this important/valuable/necessary?
- How would/could you use this in the future?

Key Points: Trust and good Leadership are essential

11.10 Leadership, Champions & Courage 30 min

Slide Titles Used:

Influence, Leadership, Courage #91-97

Key Points: See Slide Notes

11:40 Action Plan: Alliance Leadership Exercise 10 min

Slide Titles Used:



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	Alliance Leadership Requirements	#98
	Key Points: See Slide Notes	
11:50	Debrief Leadership Exercise	5 min
	Ask:	
	<ul style="list-style-type: none"> • What did you find? What needs correcting? • Why is this important/valuable/necessary? • How would/could you use this in the future? 	
	Key Points: Without good leadership, the alliance will fail. This is a pre-condition for success	
11:55	Wrap up Leadership	5 min
12:00	Lunch Break	1 hr
Part 4 Negotiations		
1:05	Action Plan: Negotiations Difficulties Exercise	10 min
	Slide Titles Used:	
	Negotiations Difficulties	#100
	Debrief Points: Ask:	
	<ul style="list-style-type: none"> • What did are the critical issues? • Why is this important/valuable/necessary? • How would/could you use this in the future? 	
	Key Points:	
	Most Negotiations lack a framework for strategic alignment, trust building, and innovation	
1:15	Negotiations: 3 Models	25 min
	Slide Titles Used:	
	Negotiations as Co-Creation	#101-105
	Key Points: See Slide Notes, Each of the three models has its strengths & weaknesses and its appropriate place. The entire 2 days has positioned each team firmly in the Co-Creative mode	
1:40	Healthy & Unhealthy Negotiations	5 min
	Slide Titles Used:	
	Healthy & Unhealthy Negotiations	#106
	Key Points: See Slide Notes, so much of great negotiations is about changing perspective and avoiding the victimization – revenge cycles	

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1:45	Imagineering the Future	5 min
	Slide Titles Used:	
	Imagineering the Strategic Alliance	#107
	Key Points: See Slide Notes, Imagineering means setting aside the victim-revenge-reconciliation cycle and aiming at bold new futures, then revisiting the past in light of a new future	
1:50	Shifting the Perspective	10 min
	Slide Titles Used:	
	Shifting the Perspective	#108-110
	Key Points: See Slide Notes; these are three methods for shifting the perspective – shifting thinking, shifting frames of reference, shifting words.	
2:00	IMPACT Framework Exercise	15 min
	Slide Titles Used:	
	Analysis: IMPACT Model	#111
	Key Points: See Slide Notes, IMPACT Model causes people to reframe negotiations	
	For Exercise Debrief, ask:	
	<ul style="list-style-type: none">• What did you find/learn/begin to understand?• Why is this important/valuable/necessary?• How would/could you use this in the future?	
2:15	Negotiations Wrap-up	5 min
	Slide Titles Used:	
	Great Negotiators & Principles	#112-113
	Key Points: See Slide Notes	
	Instructor’s Note: Beyond Win-Win Action Planning is to be used by participants after the course. Do not use in this session	

Part 5 Managing in Complex Environments

2:25	Breakdowns into Breakthroughs	5 min
	Slide Titles Used:	
	Breakdowns & Breakthroughs	#116
	Key Points: See Slide Notes, Anticipating Breakdowns prevents cataclysms, Make	



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Commitments to Breakthroughs before the Breakdown occurs.

2:30 Building the Breakthrough Culture 10 min

Slide Titles Used:

Creating Culture #117

Key Points: See Slide Notes; Recall the Impact of Culture on Behavior and Driving Forces on Culture. A Powerful Alliance Culture is essential for Innovation and Performance

2:40 Leading the Shifts 10 min

Slide Titles Used:

Leading the Shifts #118

Key Points: See Slide Notes; All Alliances require Champions, don't get trapped by cynics

2:50 Linking Metrics, Rewards, & Vision 5 min

Slide Titles Used:

Perpetuating Organizational Behavior #119

Key Points: See Slide Notes; Metrics & Rewards, if not realigned, will cause dysfunctional behavior

2:55 Break 10 min

3:05 Ambiguity – Uncertainty Continuum 15 min

Slide Titles Used:

Ambiguity – Uncertainty Continuum #120

Key Points: See Slide Notes; Use examples to explain the dilemma for senior leaders

➤ Instructor's Note: If running behind at this point you may choose one of the following exercises, and omit the other.

3:20 Conflict & Collaboration Exercise 15 min

Slide Titles Used:

Action Plan: Conflict & Collaboration #121

Key Points: See Slide Notes

3:35 Breakdowns & Contingencies Exercise 15 min

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Slide Titles Used:

Action Plan: Breakdowns & Contingencies #122

Key Points: See Slide Notes

For Exercise Debriefs Ask:

- What did you see/experience/address?
- Why is this important/valuable/necessary?
- How would/could you use this in the future?

Key Points: Breakdowns can be transformed into breakthroughs, when a culture of trust exists

3:50 Principles of Change 5 min

Slide Titles Used:

Principles of Change #123

Key Points: See Slide Notes

3:55 Leaders do 3 Things Well 5 min

Slide Titles Used:

Leaders do Three Things Well #124

Key Points: This summarizes a simple insight that resides on the far side of complexity. The 3-D fit model embraces a full and complete framework for leadership excellence.

4:00 Taking the Plan back to Work 15 min

Slide Titles Used:

Taking the Plan Back to Work #125

Key Points: Reentry is not easy given the great shift in thinking by the participants. Give the teams sufficient time to determine the best reentry method and how to gain senior level support.

4:15 Sharing Plans 10 min

4:25 Wrap-Up 5 min

- Instructor’s Note: Give a thankful, inspiring, and heartfelt sendoff to all for their great work.

4:30 Finish



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NOTES:



PART 3 – HOW TO BE AN EMPOWERING WORKSHOP FACILITATOR

Introduction

Learning to be a great facilitator and capability builder is possible for virtually anyone who wants to be. Contrary to what most people think, it is not a matter of style, or nor charisma, but it is more a set of attitudes, perceptions, beliefs that enable you to connect with your audience.

Our work *can* be transformed into art, and magnified into action, if our hearts and minds are conduits of a much greater and mightier purpose -- if we see ourselves as benefactors of the powerful “design architecture” of cooperation, co-creation, collaborative innovation, and trust building.

We are more than facilitators, we are executive coaches; we mold and shape and design the moments which collectively represent our day. Our gift is to tune our perceptions and awarenesses to see and hear what others have not, then amplify and configure these small signals into a larger tapestry of meaning, upon which the training participant is empowered and can then create action.

We must cherish the wisdom of the architecture of cooperation and co-creation and pass it on to others as our gift, as an act of our compassion, our caring, and our commitment to our larger purpose.

Aristotle commented that the aim of true art is to represent not the outward appearance of things, but their *inward significance*. St. Francis of Assisi explained the creative process in this way: *The person who works with their hands is simply a laborer; the person with their hands and minds a craftsman; and with their hands, mind, and heart, a true artist.*

Our work in alliances as coaches and facilitators is a sacred art, one for which we need to take the time and to make the effort to be sure we are there with our participants and that we are there for them, with them, and because of them.

However, no work of art can be created without two other key ingredients: devotion and commitment.



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Regarding commitment, it has been said: commitment is what transforms a promise into reality; it is the words that speak boldly of our intentions, and the actions which speak louder than the words; it is making the time when there is none, coming through time after time after time, year after year after year. Commitment is the daily triumph of integrity over skepticism, of vision over fear. Commitment gives us the discipline to attain a mastery of our art.

Devotion is a love and dedication for something higher than ourselves, an ideal, a beauty, a goodness that transcends the mundane. The devoted person sees themselves not as the cause of anything, but as an instrument or vehicle or conduit through which some greater power can be exerted to achieve a greater purpose. Devotion gives us the zen-like presence to be “in the moment,” never to be enslaved by our discipline. Devotion allows the master to see past the dogma and prescriptions of the discipline, to touch the hearts and souls of the group, to transcend the dictums and feel the pain, to touch the heart, to manifest the vision of those who seek our guidance. Thus the master is never above and never below the participant, but always by their side.

However, never should devotion and commitment be confused with “working hard.” The laborer and the craftsman “work hard.” Mastery of an art is actually not about work itself. As Sarah Woodring Fowler said:

The master draws no distinction between his work and his play he simply pursues his vision of excellence through whatever he is doing and leaves it to others to determine whether he is working or playing. To himself, he is always doing both.

Kahlil Gibran probably understood this phenomenon best as he observed in his book *The Prophet*:

*When you work you are a flute through
Whose heart the whispering of the hours turns to music.*

*When you work you fulfil a part of earth's furthest dream
Assigned to you when that dream was born,
And in keeping yourself with labour you are in truth loving life.*

*And to love life through labour is to be intimate
With life's inner most secret.*

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*All work is empty save when there is Love;
And when you work with love
You bind yourself to yourself,
And to one another,.....*

And what is it to work with love?

*It is to weave the cloth with threads drawn from your heart;
It is to build a house with affection;
It is to sow seeds with tenderness and reap the harvest with joy;
It is to change all things you fashion with a breath of your own spirit,*

Work is love made visible.



Building Strategic Alliances

1. Misconceptions

Most people have deep misconceptions about what it takes to be a great facilitator. After talking to many seminar leaders, they all say essentially the same things about what *doesn't* work: things like style, technique, knowledge, and humor. Unfortunately, most novices don't accept what the masters say and can therefore never transcend to a higher level.

1.1 It's Not Style nor Technique

The notion that style is the reason why a facilitator or seminar leader is effective is as fallacious as believing Wayne Gretzky was a great hockey star because he scored so many goals. Of course he scored goals, but what made him a great player was his teamwork – had more assists than any other player. It was his poise, his dexterity, his power, his training, his vision, his form, his expectations, and practice. *Technique is not the cause, it is the result* of many other factors, all of which can be learned and mastered.

1.2 It's Not Principally Knowledge

Being knowledgeable has limited value as a facilitator; this misconception is a bit of a paradox. While great knowledge of the subject matter is, indeed, a very valuable asset to the seminar leader, an over reliance on a knowledge base is absolute death, especially when presenting to top executives. Some of our worst sessions have been done by some of the most highly educated and knowledgeable individuals in the field. People who put knowledge too high on their list tend to be stiff, disconnected from the participants, and overly “professorial” in their presentations. While this may be acceptable at the undergraduate college or graduate school level, it is potentially suicide in executive education with senior leaders in the audience.

1.3 It's Really Not Humor

Like knowledge, humor is also a paradox. There's no question that humor is a valuable tool in any facilitator's tool kit. But it's only a tool, not a strategy. Beware of using too much humor, or else you will be seen only as a comedian. Humor can be used to break the tension in an awkward situation, to be self-deprecating, to create relationships, or to punctuate a point. But don't assume that humor is necessary. I've seen many highly effective seminar leaders who never use humor.

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1.4 It's Not About Teaching

In reality, you probably shouldn't even think you are teaching executives. It's better to come from a more powerful place: the participants "already know" and it is our job to draw out their inner wisdom and empower them to see, understand, and act upon what they know intuitively, but have little or no framework, architecture, language, or support for understanding in a way they can take powerful action upon it. When we help them act on these insights, then, and only then, have we truly empowered them.



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2. It Starts with Attitudes & Beliefs

Great facilitators of the Strategic Alliance program have an inner sense, an insight that comes from their passionate belief that within the collaborative design architecture lies a powerful set of mind-sets, solution-sets, tool-sets, and skill-sets that are transformative in their ability to produce incredible value.

Thus the skill of the great facilitator starts with two underlying beliefs:

- Belief in the power of the material
- Belief in yourself that you *can be* a great facilitator and leader

Without these two beliefs in place, all efforts will probably result in mediocrity.

2.1 In the Pathway of your Highest and Best Destiny

You should be one hundred percent certain that the course you are presenting truly something you:

- *believe in deeply*
- *are passionate about*
- *find a great pleasure in empowering others*
- *gain fulfilment from*

If so, you have a very good chance of being successful at being an empowering workshop leader.

If, however, you see facilitating this program as a chore; just another job; or dislike the travel required; quit now, before you create pain for yourself, and inflict it on others!

2.2 Surmount Your Fear with Vision, Passion and Commitment

All great champions experience fear, particularly the fears of “looking bad”, or the “fear of failure.” The masters know, however, that such fears are both normal and silly. To be a great facilitator you need an ego that is committed to empowering others, to helping unlock the secrets of alliances, to see your role as bringing out the very best in others. If you are worried about looking good, being right, having all the answers, you will not succeed. If your ego holds the phantom notions of “success,” “failure,” or “fear,” you will be rendered inadequate to listen, present, interact, and bring forth. Overcoming

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these phantoms of non-reality occurs when you put yourself in the foreground and forsake your commitment to your vision, your commitment to others, your idealism, and vision in your heart -- you must put these into the foreground, so that they loom far larger and thus dominant over any of your fears.

In other words, you may never get over your fear, but you can always make your vision and commitment so large that your fear is small in comparison.

Story:

I know of a great architect whose profession was in community landscape design. He was Harvard educated, but spoke with a very disconcerting stutter.

Although he made public presentations to community groups every week, seldom did the stutter become an obstacle. In fact, the audience almost always created the end of the sentence for/with him as he got stuck. It was amazing how they became part of his creation; they joined with him; they were co-creational with him.



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3. What You Must Know

There are five things important to “know” to be an effective and empowering workshop leader:

- Know Yourself
- Know Your Material
- Know Your Role
- Know Your Objective
- Know Your Audience

3.1 Know Yourself

The empowering workshop leader has a great deal of self insight regarding what/who they are. You must know the answers to key questions:

- What is my vision?
- What is my commitment?
- What is at stake for me?
- Is this job in the pathway of my passion?
- What are my personal strengths? Are they sufficient for the task at hand? What must my strengths be for me to do this job well? What new competencies must I acquire for me to be good at my passion?
- What results do I want to produce?
- What are my weaknesses? How will they affect my performance? Can I use my weaknesses to my advantage?
- What are my triggers/buttons, that when pulled/pushed, I react poorly? What must I do to be sure they don't undermine my performance? What makes me angry? upset? hurt? distrustful?
- What will trigger my needs to control in a way that will undermine the final result? How can I avoid such traps?

3.2 Know Your Material

Eventually the knowledge of the material must become woven into the fabric of the seminar or workshop in such a way that it resides in your subconscious. In that way, the program focuses not on the knowledge, not on the information, but instead on the foundations for action. When you have the information clear in your mind you can then deliver the program from your “soul”, and all the information will be available and present itself to you without having to think a lot about it.

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Critical things you must embrace:

- Are you a disciplined student of the field of alliances?
- Have you read the books?
- Are you current on recent articles and issues?
- Do you know the key principles that must be brought out? What examples and cases can you describe well?
- Can you focus on (and shift your focus rapidly between) the “BIG PICTURE” and the “details?”
- Do you know the unique aspects/diverse language of the industries of those attending the class?

Stories are excellent vehicles for illustrating principles, practices, and processes. These are particularly useful for describing the thorny or ambiguous. Each facilitator must know their stories and how they fit into the program. The stories should dovetail closely into the best practice architecture. Too many stories and the program becomes too much about the facilitator. Be sure to tell stories that relate to the audience. If the audience is from health care, tell health care stories, and so forth.

3.3 Know your Role

There are a wide variety of roles you can play as a trainer/coach/facilitator/ expert. Be clear on which ones to use in specific situations. The best workshop leaders switch between roles as the conditions merit.

The amateur seminar leader sees himself or herself as an “educator,” then “teaches” the course as professor to students in a manner that usually produces highly unsatisfactory results. Senior executives don’t want to be “taught,” they’d rather “learn” new insights based on their own experience.

The empowering workshop leaders see themselves as neither educators nor teachers. Rather, they understand that their role is a multiple one that switches (sometimes rapidly) from one role to another, depending what the participant needs to break through a mental block, gain a powerful insight, or feel confident that he or she can take effective action.

Among the key roles are:



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Catalyst: triggering action, energizing the people, adding a specific “charge” or ingredient” to the process that gets things moving.

Consultant: the “sage” that provides expertise and insight to the participants, enabling them to “know” or “see,” or “act” better based on guidance and direction

Coach: the one who does not play on the field of action, but provides direction, inspiration, confidence, and coordination to an experienced team of executive superstars that have a lot at stake.

Communicator: getting the vague ideas and fuzzy thinking translated into concrete specifics in a way that is both understandable and actionable.

Champion: the master motivator and passionate crusader for a cause that exudes the missionary zeal of a true believer.

Facilitator: using the expert resources in the seminar to greatest advantage by focusing *not on the content* of the course, but watching the *process and structure*.

Visionary: setting the inspirational view of the future, creating a set of possibilities that others had dreamed of in only the very vaguest of ways.

Architect: mapping out the steps that one must follow to reach the goal, showing a coordinated plan to reach a new state of effectiveness.

Analyst: the calculating, insightful, brutally honest skeptic that must be sure of the facts before proceeding.

3.4 Know Your Objective

It’s imperative that you know what your objective is for the program and for each of the segments/modules. If you are not clear on precisely what you want others to learn, the whole presentation will occur as muddled.

“Knowing your Objective” has several dimensions:

Dimension 1: **Awareness:** What new *beliefs, perceptions, insights, awarenesses,* and *sensitivities* should people have that will be different than they have now? What questions will they be asking that

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they had not thought of before? Will these questions lead to new insights and new enthusiasms?

- Dimension 2: **Architectures:** What new *systems, frameworks, processes, principles, methodologies, language,* and *strategies* are most critical that will enable the participants to get a powerful grasp of the material and be articulate enough to lead their teams into a bold new future? Without architecture and language, no leader can truly communicate with their people, nor can they provide the frameworks and tools for their people to be effective.
- Dimension 3: **Applications & Actions:** What new *actions, skills, behaviors, leverage points, motivators, influencers will produce powerful results* that they will need to use to make a concrete difference and get successful impacts as rapidly and efficiently as possible? Here's the real data: People attending seminars only remember 20% of what they learned just three weeks later. However, if they are able to put something into action quickly/immediately, they are likely to remember 80% of what they learned three weeks later. This one fact then should drive a clear value proposition for the session. That which is actionable is valuable. Don't forget it. If you can't find a way to move people towards action, they won't find you (and the session) valuable.

Be clear on the Big Picture and the End Result you are trying to achieve.

3.5 Know Your Audience

Getting to Know Your Audience can involve a wide variety of activities that will help you “tune in” to their needs. The better you know your audience, the better you will be received by the participants.



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- A. If you are doing an “in-house/on-site” program, be sure to find out exactly what the client(s) “wants,” regardless of what you think they “need.” If you don’t satisfy their wants, they will tune you out regarding their needs. Try to interview a cross section of people to get a “feel” for their issues, problems, objectives, concerns, and “at stakeness.”
- B. In virtually every case for in-house programs, there will be a “hidden agenda,” not verbalized by the participants: more/better teamwork, internal alignment, and cross-functional alliances. If you don’t pay attention to this “inner” agenda, you will not receive the highest grades at the end of the session because you didn’t meet the customer’s needs, even though you gave it 100%. Essentially, to hit the mark, you have to understand this issue, that the customer doesn’t want to talk about.
- C. If you are doing a generic seminar (i.e. the participants come from diverse organizations), be sure to get the list of participants in advance. Review the organizations (ministries, companies, alliances -- specifically the functions of the organizations) to determine what examples/stories will be the most powerful. Do you know the dynamics of those functions/industries? Do you know the deals, successes, failures, and initiatives that have been launched? The initiatives/deals that failed? Succeeded? Have you studied enough of the function/industry/field of profession to know to language they understand? To know their “do’s & taboos?”
- D. When you arrive on site, meet key participants in advance — perhaps for dinner the night before, or for breakfast that morning. Get a “feel” for the critical issues you must embrace. Before the start of the session, talk with people one-on-one to get a sense of the people, their mood, their problems, their insights, and their blockages. Quickly learn their names and parent organizations so that, during the session, you can address key principle and examples to individuals. (i.e. “Madeline, this how this is done in healthcare;” “Trevor, here’s how this translates to criminal justice;” and so forth.)
- E. At the start of the session, listen very carefully to their objectives, issues, and concerns to get a good grasp of what they need and expect from you.
- F. While engaged in the program, listen very carefully to what they say, what questions they ask, the tone of their voice, their posture, and their priorities. Understand their needs and the perspective through which they experience the world. Put yourself in their shoes before you answer their questions, so that you can frame your response in a manner that they can relate to.



4. Preparing to “Go Live”

Great workshop leaders have a deep understanding of and commitment to the “mind-heart connection” (often referred to as the “spiritual” connection) and its influence on success.

4.1 The Heart-Mind Connection

Most people, when they begin as “trainers,” observe someone who is an “expert” or “mentor.” What the novice typically observes is the expert’s “style” and “knowledge,” which comes across to the observer as quickness, energy, alertness, and expertise. While there is some validity to this notion, it is also somewhat of an illusion, much like confusing sex with love, or confusing a high IQ with greatness, or confusing strength with athletic ability.

The best of the experienced facilitators will tell the novice that most of the presentation is neither knowledge nor style nor intelligence, nor brainpower; it is, rather, a heart-felt, spiritual experience. Most novices neither understand nor accept this notion, passing off the comments of the master as nonsensical mystification.

(Unfortunately, most master trainers do not know how to teach the novice to gain access to the spiritual experience they refer to, and consequently the lessons seem to become hopelessly deadlocked. I don’t expect that this set of comments will do much good to break this deadlock, but I’ll give it a try. I’ve spoken to dozens of other empowering workshop leaders about this, and they all agree about the spiritual connection, although they may use different words to describe it.)

To get an idea of the spiritual connection, first understand that style and knowledge are important, but when “going live,” they all shift into the background. Style and knowledge become like breathing to you — they are almost automatic because they’ve become second nature.

“How does style and knowledge become second nature” you ask? The style becomes second nature when I enter the heart connection with the audience – the spiritual zone where your caring for the participants is so deep and so connected that they become one with you. When I speak from my heart, the mind supplies the details -- because I lose the ego-centric “I am center stage” perspective.



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When I become my material, my style flows through the material into the participants. When I subordinate myself to the more vital and important task of bringing new insight to those in the room, my style is generated by the experience of the insight. When I see the purpose of the training as critical to the future of not just those participants who are attending, but also to their teams and entire organizations, and even extending to their families, their children, and to their friends, my passion for the material becomes super-energized, and the style flows out through that energy.

You may rightly ask: “Well, if that’s where the style comes from, how about the knowledge part? Where do you find all that knowledge? Do you study extensively before making a presentation?”

Accessing the knowledge part of the equation requires a two-fold answer.

First, some of the knowledge comes from the same place as style. This certainly may seem like magical mystification, and it is, but it is also quite real (see box: The Synergistic Spiral).

The second part of the knowledge equation is indeed having the clear knowledge of the subject. Good presenters are, in fact, excellent students of their subject. They have read extensively about the field. They have years of experience to call upon. They know the “ins and outs” of many examples, and can draw broadly across their field, and also draw from other fields of knowledge. By having both depth and breadth, when called upon to answer, the masters are in the spiritual zone — alert, but calm — active, but reflective — in the moment, but distant in that they see themselves not on stage but from their audience’s perspective — and draw upon this vast knowledge almost instantaneously. But they never make the participants feel inadequate, small, or unknowledgeable — to the contrary — the facilitator’s knowledge just spurs the participant to confident action. This is almost a Zen experience.

“Then how do you go into this “heart-mind connection” (spiritual zone) you ask? From what I know, this is always a very personal experience; everyone does it a bit differently. Here’s what I do (assuming the seminar is one that I’ve done before):



The Synergistic Spiral

Date: Spring, 1994

Location: Barcelona, Spain

Hector Legrand, 59, is Latin American, and I've been working with him for about a year now. Earlier we had been in Spain conducting a strategic alliance seminar together – me as presenter and he as translator (I don't speak Spanish, and the Catalanian lisp is totally perplexing to me).

On stage, after about an hour, Hector and I really got in tune – head and heart. Prior to getting in tune, I would speak several sentences, then he would translate for me. Then it started to happen: He would start speaking before I finished, knowing what I was going to say before I said it. Amazing! But it got better. I started to understand the nuances of his delivery and would correct his usage of a word or phrase he delivered in Spanish, even though I hardly understand the language.

The audience noticed this as well, and during the break for lunch, many approached us to remark about what miracle seemed to happen on stage.

Hector and I had entered what we termed a “synergistic spiral” of heart-driven energy.

Date: February, 1995,

Location: Cancun, Mexico:

This session in Mexico seemed to pick up where we left off in Spain. Wow, was it worth the experience. This time, instead of being the translator, I had Hector actually do the presentation alone. On the last day of a three-day seminar program, Hector was in full gear -- active, energized, spontaneously creating in the moment, synergizing with the 60 Mexicans and Latin Americans in the audience. It was finally effortless for him, requiring no thinking, no energy, no trying -- just pure flow, pure spirit. He was so proud, energized, and enlightened.

I asked Hector to record his recollection of the events of the last day immediately, before he lost track of those marvelous moments. Here's what he said as he sat down at the end of the program:

"There, for an endless moment, I was transported away from myself, creating thoughts about new paradigms about an industry [agricultural chemicals] whose technologies I knew little about; but the participant's response to me was awesome -- to think I could contribute at such a level of thinking, when I had ignorance of the technical details.

I never thought I could get away from my ego to the point that contribution at a quasi-spiritual level allowed me to create free flow of ideas I had never experienced before.



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- The week before, I make sure I and my Executive Assistant have made sure that all logistics, attendees, overheads, and notebooks are taken care of. Under no conditions do I want to be worried about administrative matters at the last minute, when I should be focusing on the participants. (See 4.2)
- I like to arrive the night before, not that morning (unless there is sufficient time to get acclimated). I check out the room space to be sure it is properly set up and to get in the right mood. (see 4.3)
- The night before, I focus my mind onto the attendees. I do affirmations and envisioning (see 4.4). I try to read something spiritual before I go to bed, so that I am sleeping in a spiritual zone. I look forward to getting a good rest.
- Then, when I wake in the morning, I make sure I get into the spiritual zone early on. I start by setting the hotel clock radio to a classical or soft jazz station, so that I awake gently. I leave the drapes open to wake with the sun. I do not turn on the television in the morning, so that my concentration is on the class, not on the news. (I might glance over the morning paper to see if there are any interesting examples of something I can use in the class later in the morning.)
- I may go running in the morning, or get some exercise to get my body tuned up to the level my mind and soul must be operating.
- I envision the individuals working together, happy, intrigued, seeing themselves in a new light – this makes the others “central” and I am just their facilitator, inspirer, and guidance system to keep things on time and on target. I make a commitment to all those in attendance that I “will bring out the best in everyone by supporting their deepest insights and most profound understandings. And I make a commitment to myself that what is provided in the training program is “in my highest and best destiny and those of others.”
- Prior to going live in the workshop (or giving a major speech,) I reiterate much of #6, then the rest is in the hands of the audience. If the audience is a bit daunting (or the speech is still not comfortable, or I still feel butterflies before a big speech), I put myself into the hands of the audience. Let them participate early. Give them some questions to ask themselves in a team. Once the attention is on them, not me, then the session is ready to really move.

4.2 Logistics and Timing

Be sure all the logistical details are taken care of (seating, AV, flip charts, backup presentation computer or flash drive, food, handouts, etc) well before hand. If you are trying to solve a silly crisis just before

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(or during) your presentation, you will not be centered, you will not connect with the audience, and the delivery will be wooden or disjointed.

Therefore, spend the time in advance thinking through the logistics. (If you are too stressed/stretched out to take care of these things, delegate them to your executive assistant or to your partner or to your sponsor. Otherwise, your mind and soul will not be focused, nor centered, nor energized to do what you must do to be successful.

4.3 Experiencing the Space

Be sure to go to the place (stage, seminar room, conference room, etc) before you go live. Get to the location well in advance if you can. Stand in the room, on the stage area first. Imagine yourself giving the most *enlightening, empowering, enlivening, entertaining, and engaging* presentation you can conceive. See your audience in your mind as excited, involved, and willing to go on a journey with you.

Is it a “happy” space, or an enlivening space? or is it too somber and subdued? What must you do physically, emotionally, or spiritually to make the space the one you want to excel in?

Are the seats the way you want them: U-shape, classroom style, herring bone, or team tables?

Be sure all the apparatus is in the right place and working: projectors, flip charts, writing materials, handouts, etc. Are the name tags ready? Notebooks in place? Can everyone see from their seats?

Then go to the back of the room, and look at where you will be standing. This is the view everyone else has. You should see yourself from this perspective when you are actually delivering the program — from the point of view of the participants, because this is the only point of view that, in the long run, really counts.

4.4 Envisioning & Affirmations

Envisioning and affirmations are some of the most valuable “centering” devices you can use to become an empowering seminar leader. Here are some of the things you might envision:



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- What End Result — what do you see in your mind’s eye?
(Personally, I see people highly energized, asking lots of questions, contributing fully, actively engaged, powerfully motivated, having lots of fun, and fully committed to alliances. I see them co-creating with me. I see myself as a vehicle for channeling an important message/energy to them.)
- What mood do you want to create? Can you see this mood in the room?
- What do you want the participants to say about your information?
- What do you want the participants to act upon?

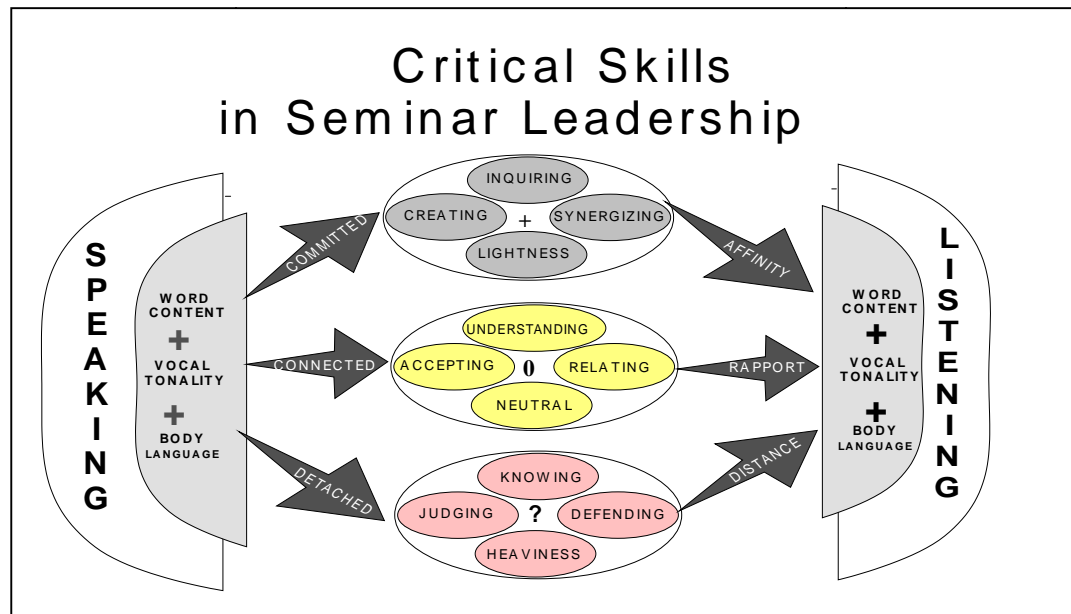
Review over the names of the attendees and envision how they will be learning, fully engaged, and enjoying the experience.

4.5 Skills Development

There are some very basic skills that are very important to making a successful seminar. Here are some of them:

Critical Communications Skills:

- Listening -- Listening is a "relating" skill, not a mechanical skill -- relating to people, and relating a theory or practice to an individual's personal circumstances, supporting a person even when you disagree with them, and being able to create an example that brings the point you are making down to their daily experience, hitting them right on so they say: "that's the exact pain I experience! How did you know?" Listening for what is really at the source of the matter, listening for the underlying pain, frustration, and anxiety that allows you to relate to the participant, to connect directly with their "soul," to find the point of intersection between that person and the others in the room where you, the course leader, can interpret, illustrate, and create in that very moment.



- Creating (Questioning) -- There is nothing mechanical about creating, and, to be effective in the learning environment, it is highly dependent upon the listening-relating skill. It means being present in the moment and being willing to flow with the energy in the room, inventing new expressions, paradigms, and insights, often while casting away the script. Creating is very dependent upon the ability to generate "questions" which empower, force people to make inquiries, to draw them to a higher order of issues. The objective is to ask the higher order question which makes them shift into new paradigms, to solve the problem with a higher level of thinking that created the problem, to give them access to their pain while at the same time enabling them to cure the pain. Great questions are more important than great answers, because, by their very nature, great questions are "generative," unfolding into even more possibilities; whereas great answers are "end-games," providing completion to the process.
- Speaking -- Speaking is more than the mechanical conveyance of data. Say nothing unless the words are spoken with conviction to create results, to stimulate inquiry, to convey enthusiasm, to revitalize, to breakthrough, to provide insight, to design frameworks, or to empower action. Speaking is more than words, it is the embodiment and physical manifestation of your belief and conviction in what you say, demonstrated in your body language, drawing pictures, and telling illustrative stories as well. Speaking requires a very careful choice of words that are designed to empower, examine, and enliven. Good speaking is like good writing – it communicates powerfully (see Section 6 : Getting Your Point Across in 30 Seconds).



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4.6 The Art of Listening

Listen to people's words, not just for their content, but for the inner meaning. Your participants words are only symbols of much deeper meaning for them.

Use "Active Listening" Techniques when you hear some emotion or pain or frustration behind a question or comment.

"You sound pretty frustrated about"

"Would you say some more about that....."

"Tell me more about how the others don't seem to get it....."

Some Common Listening Errors (these are only bad when you don't use them appropriately. These can be used judiciously, but only when you know or are pretty sure you're on target):

- | | |
|----------------|--|
| Adding: | generalizing or expanding what is being expressed |
| Omitting: | reducing or leaving out pertinent facts or feelings being expressed |
| Analyzing: | interpreting underlying motives, psychoanalyzing |
| Parroting: | near word-for-word repetition of what is said |
| Lagging: | backtracking or failing to keep pace with what is being communicated |
| Rushing: | anticipating the next thought |
| Undershooting: | lowering the intensity of the expressed feelings |
| Overshooting: | intensifying the emotions expressed |

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5. In the Field of Action

5.1 The Opening

5.1.1 The Encouragement

After the administrative comments (timing, breaks, safety, etc), how you start the program is important. I usually start by saying how I came to the program – a career seeking to understand how to get people to work more effectively across boundaries. And in learning this, a complete “design architecture” has evolved that enables people to be better at any type of collaborative venture.

When facilitating a group of government leaders, I tell them of some of my experience in government, and why it led to strategic alliances, and then how collaborative innovation and trust building led out of alliances.

I emphasize how I’ve made just about every mistake there is to make, and what a humbling experience that has been.

5.1.2 The Commitment

This then leads to the seminar leader's commitment:

My commitment to you is to empower you to lead as inspired champions and architects of alliances, to leave you with an enlivened vision, and provide the skills, tools, frameworks, and resources to make these alliances happen in your life.

All of you have a lot at stake — your careers, your reputations, your ability to make things happen. My commitment is to ensure that you will have the vision, the architecture, and the critical tools and skills to be successful at your chosen profession: cooperative ventures.

And along with this, I will give you knowledge. But more importantly, I will give you the opportunity to revisit what you’ve already learned from a new, higher, and more enlivening perspective. In this sense, I



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ACTION IS MORE VALUABLE THAN WORDS

Here's the real truth about presentations: People attending seminars only remember 20% of what they learned just three weeks later. However, if they are able to put something into action quickly/immediately, they are likely to remember 80% of what they learned three weeks later. This one fact then should drive a clear value proposition for the session. That which is actionable is valuable. Don't forget it. If you can't find a way to move people towards action, they won't find you (and the session) valuable.

will not be "teaching" you anything, but enabling you to use your knowledge and experience more effectively to be a better leader.

5.1.3 The Value Proposition

Remember when you first entered public service, you all had a dream that you could truly make a difference – that you could do something useful and valuable for your fellow man. For many, this course will help rekindle that dream, will reignite your passion to make a real difference, and give deeper meaning and purpose to your work.

This course, if you follow the practices and principles, will dramatically increase your success rates in alliances, new ventures, joint initiatives, and new program/project launches.

5.2 Setting Expectations

Everyone walks into the room with expectations – all of which are potential for misalignment if they are not addressed. It is a good idea to have the expectations discussed during the introduction to be sure the course is in good alignment with individual's expectations. This can be addressed in more detail during the value proposition and the introduction at the beginning of the program, at the beginning of each module, and checking at the end of each day.

Let everyone know during the introduction that if anyone has any unique requests, you are happy to discuss these in detail during breaks, at lunch, or you will set up a time over breakfast or even dinner to be sure unique expectations are dealt with.

5.3 Delivery

5.3.1 Keep the Energy High

The participants will only get as energized and committed as you are. If your energy is waning, theirs will too.

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The Power of Questions

- Questions are More Important than Knowledge,
- Questions Promote Better Learning
- Questions Shift Thinking to Higher Order
- Questions Focus and Unify
- Questions Engage and Energize
- Questions Give Meaning and Purpose

One good way to keep the energy high is connecting a point you are making with a person in the room – this keeps the participants engaged and the facilitator alert.

If you, as facilitator, are pushing/trying too hard, cramming things into people’s minds, or delivering energy where theirs is lacking, then something is wrong. Get the participants engaged; open up the discussion,, throw out a powerful question, tell an intriguing story, or have them do and exercise that requires them to think and put something on the flip chart.

5.3.2 Keep the Pace Quick & Create the Flow of Peak Experience

It’s essential not to get too far behind. Many of the exercises are not designed to be brought to full completion but rather to get people into the application, and then to finish the exercise when they are back with their teams.

The facilitator must, however, know when to slow things down because it’s a critical issue or there is a lot of insight being demonstrated or it’s a point of contention that people must work through. If you run roughshod over your audience for sake of time too often they will not see you as caring about the real important stuff.

Beware if only a few people are engaged in a hot issue, leaving others out of the conversation. If that happens, suggest we move on, and those who need to continue with the discussion take it on during a break.

There’s a sequence of dialogue for keeping people engaged; it goes like this:

- Ask Questions: Ask them lots of questions and then make them answer the questions (you may have to wait them out, don’t let them off the hook, ask the same question in a different way if necessary – eventually someone will get



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antsy and answer the question because they can't tolerate the silence). Questions are vital because they trigger the problem-solving part of the brain to engage, at which point people will be fully involved.

- Focus on a Key Principle or Practice: Tie the answer to the question to the Principle or Practice you are teaching at that time. The linkage between the question and the principle will set the mind onto a powerful cause and effect relationship –the new learning.
- Example: Make the new learning “concrete and real” by illustrating with a real, clear example that people can see as a highly impactful example of success. Include measures of success when possible.
- Application: Throughout the program are real-time, real-life applications of the principles and practices. The more quickly people can apply the learning to their situations, the better/stronger the retention rate. And, just as importantly, applications give people new skill sets. By working in teams, team mates help each other digest the new ideas, concepts, and frameworks.

As a general rule: *Know the point you want to make before you make it*

Use of Data

Data alone is boring. The process for bringing data into the seminar is built on a simple 4 step design:

1. Have some structure (i.e. overhead, story, case study, activity, architectural construct, or tool) to produce a point (or concept) and a valuable result the point will produce.
2. Connect the point with a key question (if possible) to draw their attention and to create a field of inquiry.
3. Illustrate the point succinctly with a concrete example in real life.
4. Relate the point in real life with a single person in the room (i.e. by calling out their name, and illustrating the idea in their language, their business, their situation.)

Generate lightness with humor

Any course should not only have a heavy “funereal” demeanor (unless it's about death and taxes). Neither should the course be a running set of jokes. But be sure to “lighten up” and

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perhaps poke a little fun (at yourself, unless you know someone well enough to engage them in light humor).

Inevitably there will be someone in some course who insists on “political correctness” at every turn in the road and will be looking to trip you up – this is the tactic of the “compliance police.” They listen with “enforcement” ears, not from the heart. The effect is to kill spontaneity as the victim of the police enforcement must walk on eggshells, never knowing when they will step on someone’s over-sized, over-sensitized toes. For the Compliance Police, listening is always for evaluation, not for co-creation or even for clarification. When people go into the critical evaluation mode, they cut themselves off from relationships, learning, and true communications, while they fill their heads with supercilious superiority.

As a facilitator, if you get cornered by a compliance critic, don’t spend a lot of time defending yourself, just apologize, explain you were ignorant of the issue or come from a different culture where the words have a different meaning, and move on. You cannot win a battle of wits with the compliance police – if you do, they will get even later in the evaluations with excoriating remarks that will scathe your reputation and credibility with others.

5.4 Connecting with Individuals

5.4.1 Monitor yourself & your alertness

Know why you do what you do (Why did I pause for 15 seconds? Was it really 15 seconds?)

Why did I choose the example I used?

Did I phrase the story in a powerful way?

5.4.2 See yourself not in the center of attraction

Mentally position yourself in the back of the room, watching this person in the center performing --- how does your performance look?



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5.4.3 Watch the Non-Verbals

The majority of all communications is non-verbal. Your audience will tell you if they are engaged by watching their eyes, their facial expression, their body language.

Their meaning will only be stated vaguely from the content of their words:

7%	words
23%	tone of voice
35%	facial expression
35%	body language

Monitor these four dimensions when you listen

5.4.4 Focus on Them, Not You,

Don't try to show how smart you are, (they will take you down), but be sure to empower them

Don't try to be liked, just "add value"

If someone is starting to drift, relate an example to their situation. Call them by name: eg "Janine, remember when you commented on, well this principle applies to that situation in a very powerful way."

5.4.6. Create Relationship

Connect with their pain/pressure/vision/ and the gap between their reality and their dream

Model their language, determine what/how you would be perceiving, thinking, acting, if you said those same words.

5.4.7 Generate Trust

You must guide people into the unknown, the uncertain, the ambiguous. To do this they must trust you

To be effective and gain trust, you must:

- show how you produce value every moment
- gain each person's respect
- demonstrate ability to achieve powerful results
- be willing to put your needs behind the needs of the group
- empathize with key issues and feelings

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- be humble, yet knowledgeable
- Be alert to their need to solve the problem for themselves
- Demonstrate what they know, but from a new perspective, with a fresh insight
- Give them something that they never knew before
- Know your material so well that the content enters the subconscious, occurring only in the background. This then enables the group to become the focus, the foreground.
- We are only a bridge between the information and their action, we are not the center.

Caution to the Trainer who is also a Consultant

Don't Sell Your Consulting Services—it will backfire. Just empower people.

5.5 Taking Care of Yourself

- Don't look for recognition, credit, or accolades; these will only come if you don't seek them.
- Shelf your personal life during the program (unless you've got a good illustration from your life.)
- Don't try to look good in front of a group – don't brag about your successes. People will relate better to your struggles and what you learned.
- If conflict shows up in the session, use it as learning. Don't try to win a debate unless someone is looking for the way you'd deal with a difficult situation.
- Cherish differences of opinion – they generate great discussions.
- Don't make people wrong; just seek alternatives.
- It's OK to "not know."
- Keep an eye out for people who sit in the Corners – often (not always) they will be the most judgemental of the attendees.

Last Point: You don't have to be perfect at all this, just be genuine. Strive for perfection, but recognize it may happen at times you least expect it.

Stay in the "Here and Now" *This is known as "being in the moment"*

Quote from *The Tao of Leadership* by John Heider:

"The wise leader knows what is happening in a group by being aware of what is happening here and now. This is more potent than wandering off into various theories or making complex interpretations of the situation at hand.

Stillness, clarity, and consciousness are more immediate than any number of expeditions into the distant lands of one's mind. Such expeditions, however stimulating [to the leader], distract both the leader and the group members from what is actually happening.

By staying present and aware of what is happening, the leader can do less, yet achieve more."



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6. Making Your Point Concisely & Powerfully

(Some portions excerpted/adapted from the book “**How to Get Your Point Across in 30 Seconds** by Milo Frank)

6.1 In today’s world, time is precious.

Don’t be Long-Winded:

– if you can’t say something clearly and concisely, perhaps you shouldn’t be saying it at all.

Your audience’s time is very precious – they’ve given you two day of their time –their business demands will be stacked up when they return. They don’t want long-winded, fuzzy-wuzzy, lectures; they will resist theory and vaguery; they seek conciseness, being to the point, being clear and precise, illustrating with compelling examples.

It is essential to make your point quickly, often within 30 seconds, no matter how much time you are allotted. This requires real discipline, clarity of thought, and logic in sequencing, all the while speaking clearly, with appropriate intonation, pauses, and emphasis.

One of the key elements of precision is to start your speaking with a question that draws people in and unites everyone’s mind.

Then engage the audience in jointly answering the questions. To every answer, be supportive, even if it doesn’t fit the bill. Ask if there are other answers. Acknowledge and ask are there other answers – what else. Most of the questions have multiple dimensions, thus multiple parts of the answer.

6.1.1 Aim for 30 seconds

There are two compelling reasons why 30 seconds is the time window for getting a point across to an audience:

- **Time constraint**

- Time waits for no one -- Today you must move faster just to stay even
- To move faster you must be concise – No one wants Blah - Blah

- **Attention Span**

- Average span for most people is 30 seconds. If you haven’t captured their attention in that time period, the mind starts

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- to wander.
- Media research says average viewer has span of 30 sec
- "If the subject doesn't make his statement in 30 sec. or less, I can't use it and it doesn't make the air."
 - "We've discovered that if you can't say it in 30 sec. you probably can't say it at all."
 - A mind can only accept so much information before it needs some time for reflection
 - Average time of news stories on TV is 1 ½ minutes.
 - 30 sec to set up story
 - 30 sec for actuality
 - 30 sec to summarize

6.1.2. First Basic Principle of Conciseness: Have a clear-cut Objective

The objective is:

- the Goal of the Module, or the Presentation
- the Destination at the End of the Application, or
- the Purpose for the Best Practice, or
- the Target to be achieved, or
- the Raison d'etre for our very existence

Ineffective presenters don't really know what their objective is, thus they can never be clear-cut and specific

6.1.3 Second Basic Principle of Conciseness: Have a clear-cut Value Proposition

Be sure the objective has real value. Something without value is worthless. Understand how value impacts on the reason for making this issue come to the fore. Is the value:

- Clear?
- Time based?
- Specific?
- Accepted by others as valuable?
- Compelling?
- Something people would spend money, time, or personal energy on acquiring or saving?

6.2 Know Your Audience -- Their Language & Culture

Presenting concisely means you'd better know the terrain. People coming from healthcare don't speak the language of soft-ware developers who don't speak the petroleum industry. It's not just



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language; each profession/field has its own culture, customs, and modes of operating. Don't venture into "unknown terrain" not knowing who or what you're going to find when you get there.

6.2.1. Third Principle--Know your listener and what he wants

- Know who you're talking to before you open your mouth
- Research the profession or interview some professionals before the session if it's a field unknown to you.
- Know what that person or group has for objectives, dreams, problems, dilemmas, obstacles, and what they will value.
- Know in advance what will generate favorable reactions and what will turn them off
- Know as many facts as possible about the person/persons/profession you'll be talking to

Clarity & Candor or Obfuscation & Confusion

George Orwell, in his famous piece: *Politics and the English Language*, gives this example:

Let me give another example of swindles and perversions in writing. This time it must of its nature be an imaginary one. I am going to translate a passage of good English into modern English of the worst sort. Here is a well-known verse from *Ecclesiastes*:

I returned and saw under the sun, that the race is not to the swift, nor the battle to the strong, neither yet bread to the wise, nor yet riches to men of understanding, nor yet favour to men of skill; but time and chance happeneth to them all.

Here it is in modern English:

Objective considerations of contemporary phenomena compel the conclusion that success or failure in competitive activities exhibits no tendency to be commensurate with innate capacity, but that a considerable element of the unpredictable must invariably be taken into account.

This is a parody, but not a very gross one.... The whole tendency of modern prose is away from concreteness. Now analyze these two sentences a little more closely....

The first sentence contains six vivid images, and only one phrase ("time and chance") that could be called vague.

The second contains not a single fresh, arresting phrase, and in spite of its ninety syllables it gives only a shortened version of the meaning contained in the first. Yet without a doubt it is the second kind of sentence that is gaining ground in modern English

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6.2.2. Fourth Basic Principle--A well formulated approach

- The premise, root idea, concept, focus, driving force, strategy, game plan, or theme of your message, the foundation,, the heart of the matter, the skeleton in the body, the melody that runs thru the music
- Just as you only have one objective, your must choose only one approach
- A clear-cut right approach stated in a single sentence is a guarantee against ever forgetting what you're talking about.

6.2.3 Fifth Basic Principle – Clarity and Candor

Major problem in communicating, is simply understanding what the other person is saying.

- Many feel it necessary to use big words, technical terms and complicated sentences to make themselves sound knowledgeable
- Only someone who truly knows his subject can say what he wants to say in clear and simple language.
- Candor is vital; blah-blah is garbage.
- One of simplest and most natural ways to get rid of business-ese is to personalize by using a personal story to illustrate your point
- By sharing a personal story, people identify with you and care about what you have to say
- Most effective messages are those that reach the heart of the listener. Emotion causes change

6.2. 4 Sixth Basic Principle -- The Hook

What allures, entices, tempts, tantalizes, fascinates, captivates, enchants, attracts, bewitches, catches, hypnotizes, makes you remember and gets you to buy a product, stay tuned to a show, or keep reading is the **hook**. Use the hook as the first statement in your 30 sec message

A hook is a statement or an object used specifically to get attention

- Newspapers always use a hook-headlines
- TV uses clips of exciting scenes as hooks.
- First thing you must do is get someone's attention



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Finding your hook - ask yourself:

- What's the most unusual part of your subject?
- What's the most interesting and exciting part of your subject?
- What's the most dramatic part?
- What's the most humorous part?

Reduce the above four points to one sentence each

After finding candidates for your hook-ask:

- Does the hook lead to your objective?
- Does the hook relate to your listener? Does the hook relate to your approach?
- Will the hook excite or interest your listener?
- Can the hook be the first sentence in your 30 sec. message?

Finally, decide if your hook serves better as a sentence or a question.

- Questions can be double-barreled -- people usually pay attention when you ask them a question
- If you use a question, it must be answered in the 30 sec.
- Hook can be serious, dramatic, or humorous, but must capture the interest. If its dull, it won't accomplish its purpose which is to get attention.
- The more dynamic the hook the more effective the total message becomes
- Sometimes best hook is visual rather than verbal
- Anecdotes or personal experiences make good hooks. Keep a personal journal -- "hook book" -- for future reference
- Subject of your 30 sec. message must explain, reinforce, and prove the point you are there to make.
- In order to do that, it must contain: who, what where, why and how.

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6.3 Call to Action -- Ask for Action

This is the Call to Arms, the Request, the Command, the Prescription, the Contract, the Bottom Line, the Close---all add up to *ask for Action!* A message without a specific request is a wasted opportunity. If you don't ask for something specific, the chances are you'll get nothing.

6.3.1. From Ideas to Practices to Application

After the presentations and discussion of best practices, you must ask yourself-"What action do I want from the participants/listeners?" The answer is "your call to action"

6.4 Creating an Impression

6.4.1. Speaking with Respect, Authority, Inspiration & Inquisitiveness

Study after study has shown that it is undeniably true that *how* you say something is often more important than *what* you say. If it's not good, you've lost an opportunity that may never come again.

- Speak Up
- Your voice is your instrument
- Its volume, tone, pitch, expressiveness and skill with which you use it-reveal your own state of mind and influence listener's response to your message
- Respect & Compassion
- Demonstrate how you respect everyone's opinion with your voice
- A voice that cares is a warm, modulated voice
- Authority & Confidence
- As facilitator, you must demonstrate your "presence" as a real, genuine, experienced, and confident
- When you aren't sure, do so with confidence that others in the room will have the answer, or together we can find the path forward.
- Never sound like a "know-it-all" or the group will quickly tear you down.
- Monitor & Modulate
- Regularly listen to yourself to see if you are speaking from your diaphragm,
- Keep your voice well modulated. Listen to the voices of very well trained actors (especially from older movies. My



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favorite “voices” are those of Errol Flynn, Walter Pigeon, and Claude Raines – I never get tired of listening to them. They could make the most mundane come to life.)

- Method
- Speak the last few words softly-- Using this technique, people have to lean forward to catch your words
- Another attention getter is a pause -- Gives emphasis, Gives you time to think, Gives your listener time to absorb Gives you a chance to see if your listener understands
- Never memorize, frequently personalize, always care about what you are saying

6.4.2. Style and image

Ralph Waldo Emerson said: *"A man's style is his mind's voice."*

Style consists of: facial expressions, posture, gestures and movements, tone of voice, physical appearance and clothing

- Smile: Among facial expressions, smile is most important
- Inspires confidence and understanding
- Nothing more warming if sincere
- Keeps people from feeling they need to be defensive
- To create a genuine smile, think of something that amuses you or put humor in your 30 sec. message. If you say something amusing with a smile, 9 times out of 10, your listener will smile right along with you.
- An “inquisitive smile” is very productive in a serious discussion
- If you everything you say is serious, there's no variety, not contrast. If all music were one note, you wouldn't listen
- Facial Expression
- Your goal is spontaneity and sincerity
- Maintain good eye contact, always aim your eyes at a person or persons when you speak. Don't talk to the back wall.
- Body Movement
- Change your position in the room so that you aim your direction to one side, then the middle, then the other side.
- Your movements, gestures and posture are just as revealing as your facial expressions
- No movement at all is just as distracting as meaningless movement
- Gestures or movements should work together to create an effective impression
- Posture sends a double nonverbal message: it reveals what you think of yourself and what you think of your listener.

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Posture should be relaxed but not too relaxed, alert but not tense

- Self-awareness is the secret- when you are aware of how you look to others, you can use that knowledge to look the way you want to look
- Clothes – What to wear
- What you wear and how you wear it are powerful signals
- Walk the fine line between how to fit in and how to stand out
- If you wear something that calls attention to itself rather than to you, that maybe all they notice
- It doesn't really matter how expensive your wardrobe is or how old-fashioned or up-to-date it is, as long as it gives the impression that you care
- Never, never look like a slob or be dishevelled – how you look is a measure of how well you respect your audience.

6.5 One, Many, or a Thousand

The empowering workshop leader talks to individuals, workshop participants, or large congregations in the same manner; the approach is the same.....

Ask and answer several provocative questions,
Paint more than one picture,
Use more than one personal anecdote or experience.

6.5.1. Never Memorize!

- What happens if you forget? Use a PowerPoint as a cue card
- When you memorize, the material controls you, rather than you controlling it.
- Master your material, but don't memorize. Memorizing robs you of being natural

6.5.2. Never Read a Speech

- Speak to each person in the audience
- Look them in the eye and deliver your message
- When you deliver a speech, your passion and mastery of the subject is obliterated if you read the material.



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6.5.3. Preparing for a Speech

- Outline your talk
- Write your talk
- Reduce your talk to notes

6.5.4. Using Your Notes

- Each time you rehearse from notes, your speech will be a little different-and better
- Talking into your notes destroys rapport, makes your voice go down in level, and weakens what you say
- Whenever you speak, speak to your audience, not to your notes (overhead slides perform the same function as notes – they trigger your thinking)
- You're never to give a speech, you are there to deliver a message

6.5.5. A speech (or seminar) really is a Performance

- Two simple steps you can take to see your introduction gets you off to a running start:
 - First, find out who's going to introduce you and a day or so before the speech, give that person the necessary information for your introduction
 - Second, and better yet, write your own introduction
- Even before you begin your speech, establish rapport with your audience by smiling and making eye contact. Look at your audience, not over their heads. Try to avoid using a podium or microphone, if possible
- Make everyone feel you're talking directly to him/her. Find someone in the audience who is nodding their head in agreement or smiling, and frequently go back to them with your message to get reinforcement. If you can, refer to some people in the audience by name or by position. React to the audience's reactions-if their attention wanders, do something to bring them back
- Put variety into your message by a smile, gesture, moving forward, changing your position, speaking loudly or softly

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or rapidly or slowly, pausing, asking a rhetorical question, being humorous, dramatic, or emotional

- Establishing your credibility is a top priority, Your audience should know why they should listen to you, and a few brief words about your credentials will help your credibility
- Tell a brief personal (or poignant) anecdote that will relate directly to your audience's experience and will establish the fact that even though you're the chairman of the board, a famous astrophysicist, or an expert in coronary bypass surgery, you're human. Tell a personal anecdote about one of your early failures; this technique can be called "making yourself human"
- Finishing:
 - Always leave them wanting more
 - Speech should always end before your audience wants it to end
 - Always have the first few and last few sentences firmly in your mind
 - Making a speech is like telling a joke- you don't want to blow the punch line

6.6 Answering Questions

6.6.1 The Perfect Answer

- A skillful speaker anticipates questions and previews in her mind the point she wants to get across in response
 - Her knowledge of her objective, her listener, her approach, and her subject allows her to frame an answer that is direct, concise, informal and effective
 - Even in handling a difficult question, you get the opportunity to speak and get your message across. For example:

After a series of crimes in a city park, aroused citizens of the neighborhood were demanding action. A police captain agreed to answer their questions. One man asked angrily why no arrests had yet been made. "Even though we have very little evidence to go on," the police captain said, "we're pursuing every lead. We have



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also stepped up police patrols of the area and the lighting is being improved. Your park is much safer now." The police captain answered the question, and while that answer may not have been the one the angry citizen wanted to hear, he reassured his audience and get his own point across.

6.6.2 The Question Turnabout

- The opportunity to get your point across is almost always there. If not, create your own opportunity. There's always a way to answer a question and turn it to the point you wish to make.
- Here are some transition phrases:
 - "I don't know about that, but let me tell you about..."
 - "You're absolutely right, and one other point is..."
 - "I'm sure that's true, and another thing I'm sure of is..."
 - "That can wait until tomorrow, but something that can't wait is..."
 - "I agree with you, and I'm sure you'll agree that..."

The Dilemma of Answering Questions

When giving a speech, questions should be answered concisely and directly.

However, know that the more senior the person asking the question, the more multi-dimensional the question. Thus an answer to a junior person may be rather simple and straight-forward and be sufficient.

But when answering a question from a senior executive, you may want some clarifications first about the circumstances, before answering to be sure you truly understand the nature of the question.

In workshops situations, questions present a different opportunity because of the interactive nature of the session. You might want to:

- throw the question back at the audience for them to address
- take the question apart to look at its multiple dimensions
- reference it to something they've already learned
- answer it directly and move on
- park it for a later time when it fits better into the sequence of learning

It's always fun (and you know the course is going well) when someone asks a question that leads you to the very next slide!



APPENDIX: READING MATERIALS