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COLLABORATION

M
ETRICS
&

HEALTH DIAGNOSTICS
Workshop



International Collaborative Leadership Institute

COLLABORATION METRICS & HEALTH DIAGNOSTICS

Why a COLLABORATION METRICS & Health Diagnostics Workshop?

YOU GET WHAT YOU MEASURE

Metrics are more than just after-the-fact measures of success. The right metrics align strategic goals and rewards systems.

Metrics can reinforce collaboration, drive innovation, or, to the contrary if poorly designed, actually hinder innovation and drive dysfunctional behavior.

Just as your car engine monitors critical functioning, like gas consumption, oil pressure, and temperature, no team, alliance or collaboration is complete without a metrics model to monitor and adjust its performance.

MAXIMIZE PERFORMANCE

Knowing the right metrics and their leading indicators enables you to measure those factors that have powerful impacts on the top and bottom lines. Learn how to create a very powerful metrics model which will both focus human energy, promote synergistic action, enhance performance, and monitor progress.

Your organization makes a substantial investment in people, team-work, and alliances.

Be sure to keep it focused with the right metrics, and keep a pulse on its effectiveness



What Value Can I Expect?

This workshop is a real work session applying best principles and practices that will result in your team producing World Class Alliance Metrics to guide your alliance.

Our system and methodology has been time-tested around the globe for twenty years and is considered the *standard of excellence* that has been adapted by thousands of alliance professionals over the world.

Who Will I be Working with & Learning from?

Robert Porter Lynch has been in the vanguard in the field of alliances, collaborative innovation, and trust building, as both a thought leader and expert professional with an extensive world-wide track-record; his methods have produced the highest performing alliances.

The author of several books, Robert's work has been recognized internationally.



COLLABORATION METRICS & HEALTH DIAGNOSTICS

The Metrics Advantage:

The best companies made sure that people align their rewards with their metrics to prevent dysfunctional performance. This is much more important and much more complex than most people think. Learn the best practices that enable precision alignment .

Strategic Return on Investment (STROI) – A Balanced Scorecard:

To gain maximum performance from people, it's important to focus not just on bottom line performance, but on maximizing long term impact in other dimensions as well.

We developed the STROI approach to capture the synergistic interaction of value creation to enable collaborative leaders to:

- Develop powerful *strategies* using collaboration
- Increase the *performance* of each team or alliance
- Maximize *functional* synergy
- Improve *coordination* across organizational boundaries
- Successfully *compete* in a rapidly changing world
- Build *capabilities* to sustain alliance advantage



Keeping Collaboration Healthy – Value of Diagnostics:

Maintaining high performance is paramount. Every organization is a dynamic interplay of human and strategic forces. Assessing key factors for success on a regular basis is essential. Being able to understand what is going well, or poorly, in any collaboration is critical to practitioners, particularly when many organizational or alliance members are spread around the globe and things have a propensity to change rapidly. A good diagnostic instrument is a must-have tool providing an ability to see deeply into the inner workings of a collaboration, just as an MRI, combined with lab tests and blood samples, sees into a human being.

In this workshop you will learn the best practices for conducting an collaboration health survey, what factors to address, how to present the data back to the stakeholders, and, most importantly, how to ensure critical issues are transformed into high performance.



Linking Metrics, Rewards, & Diagnostics:

To attain success, metrics must be carefully linked to rewards otherwise people will be encouraged to act in dysfunctional ways.

Learn how to design rewards systems that promote teamwork, innovation, cross-functional integration, and profitability.

Gain insight as to who are the best people to bring into a collaboration, and who, although qualified, will actually make poor team members.



AGENDA

1. WHY METRICS ARE SO IMPORTANT

- You Get What You Measure
- How Metrics help Guide Strategy
- Biggest Metrics Mistakes
- Using Metrics to Increase Value Added in the Value Chain
 - Workgroup Action Plan



2. STRATEGIC RETURN ON INVESTMENT – BALANCED SCORECARD

- Why a Balanced Scorecard is Vital for Success
- Performance Metrics versus Activity Metrics
- Measuring Leading Indicators & Invisible Risks
- Linking Rewards to Measures
- Avoiding “Metrics Spaghetti”
 - Workgroup Action Plan



3. MEASURING INNOVATION

- Measuring the Seven Types of Innovation
- What People Fear about Measurability
- Five Types of Measures for Strategic Return on Investment
- Creating Breakthroughs in Value
 - Workgroup Action Plan

4. MEASURING COLLABORATION & TRUST

- Ten Collaboration Metrics
- Why Trust Metrics are Critical to Performance
- Operational Targets Linked to Value Creation
- Turning Operational Breakdowns into Breakthroughs
 - Workgroup Action Plan

DID YOU KNOW?

Without trust, the brain's chemistry actually shuts down our ability to collaborate *and* to innovate.

5. COLLABORATION HEALTH DIAGNOSTICS

- Measuring Strategic, Chemistry, Operational, & Dynamic Alignment
- Preparing the Diagnostics Analysis
- Surveying & Gathering Data
- Analysis & Evaluation of Results
- Feeding Back Data
- How Diagnostics Make a Difference
- Critical Benchmarks
 - Workgroup Action Plan

Diagnostics provide a snapshot of key issues and a handle on how to fix problems

6. TYING METRICS, REWARDS, & DIAGNOSTICS TOGETHER

- Why Financial Rewards are Insufficient
- Importance of Aligning Rewards and Metrics
- How to create a Rewards System that escalates innovation
- How to Choose the Right People who will perform best
- Compensation, Recognition, Promotion, & Career Pathing
- Two Different Types of Trust Needed for Success
- Establishing Breakthrough Operating Principles
 - Workgroup Action Plan
 - Finalizing the Go-Forward Plan

Available in Two Formats

- ½ Day
- 1 Day

COLLABORATION METRICS & HEALTH DIAGNOSTICS

You Will Learn:

- Five critical performance factors that must be measured
- How to engage your stakeholders & partners in the design of metrics and diagnostics
- Five steps necessary to ensure diagnostic surveys will result in concrete improvements
- Six typical mistakes in metrics, and how to avoid them
- Three incorrect assumptions people make about rewards, and how to avoid them
- How to focus on the most important metrics and not get tangled in minutiae
- How to ensure metrics focus on leading indicators of success that precede profitability
- How the right metrics actually contribute to high performance and drive achievement of goals quickly
- How to feed back data from an on-line survey in a way that will produce the right results with the least resistance to change
- How to identify emerging problems before they get out of hand, particularly those that might be happening in isolated areas of the organization where your people are not directly connected

Too many collaborations fail.

Yet most not need suffer this fate.

By monitoring the "health" of an alliance, you can determine if there are Early Warning Signs of distress and take action with ample lead time to prevent serious difficulties

Having a Wide Array of Innovation Relationships

Requires an Ability to Diagnose their Health from a Distance



"The Strategic Planning and Collaboration Workshop exceeded our high expectations.

It's seldom in life that one encounters a true master of their craft, but we found that with Robert Porter Lynch and his team.

They brought needed clarity, alignment, and enthusiasm to our development strategy."

Jeff Mettais – VP Strategic Business Development, A2BE Carbon Capture LLC

Key Questions asked by Collaboration Professionals addressed in this Workshop:

- Am I getting enough value from my teams & alliances? What should I be measuring?
- How do we get really good at this so it becomes a competitive advantage?
- How do we increase our performance levels to be world class?
- Can we objectively address the distrust between us without causing a bigger breakdown? How can spot difficulties that may otherwise go undetected until the problem is terminal.
- What metrics are the most important to focus upon (so we don't get side-tracked with a "metrics monster")? Am I measuring the right forward indicators?
- Can we pinpoint the really leverageable issues that need to be fixed quickly and will produce the highest return for our effort?
- How strong is the relationship between the organizations? What is the level of trust? What is the real level of communications? How can we move faster?
- Am I hearing what is really going on in real-time? Is there a cost-effective way to monitor the health of all our external relationships, including those with development partners, key customers, and suppliers?



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Why Should I Use a Workshop Approach?

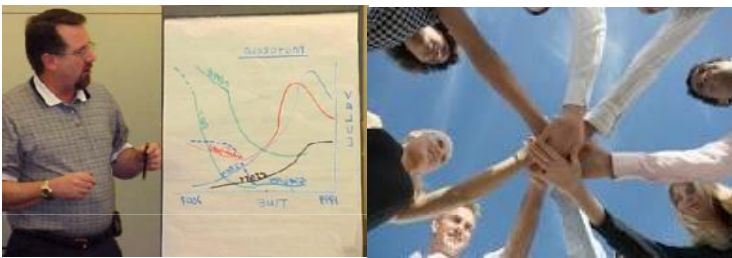
When making a decision about how to improve team performance, any ardent follower of winning sports teams knows that behind great stars invariably there is a great coach. Often great coaches take losing teams to the top of their game in only one season.

How can you inject the impact of a great coach into your team or alliance quickly, economically, and with the expectation of great results in rapid order? The answer is coaching through a two-fold strategy:

First, reveal which best practices produce dramatic improvements.

Second, avoid the biggest mistake in learning: *knowledge brings results*. Studies show that simply having individuals attain knowledge does *not* improve results. Results come when teams apply their learnings together, immediately upon their joint learning.

Using these two strategies is why our workshops are so successful.



What can I expect?

Participants develop their own strategies & techniques that they can begin applying immediately into their organization.

Learnings will be offered through case examples, interactive sharing of ideas, and practical project development sessions.

About your Workshop Leader

Robert Porter Lynch has been creating alliances for over thirty years. His studies of Alliance Best Practices, beginning in the 1980s have resulted in thousands of successful alliances all over the world. Over 25,000 executives and managers have attended his programs and workshops worldwide.

CEO of The Warren Company and has consulted widely for scores of major companies in the high tech, communications, pharmaceutical, natural resources, financial services, healthcare and consumer products industries, among others. He's also assisted numerous smaller business, private-public partnerships, and government agencies.

Robert is Founding Chairman of the Association of Strategic Alliance Professionals. He teaches at the Universities of Alberta, British Columbia, and San Diego; he's the author of nearly a dozen books and numerous articles. His current book, *Trusted to Lead* will hit the bookstores early next year.

Highly Acclaimed

Because the program design carefully links Best Practices with Practical, Real World Application, these are typical statements from the workshops:

Superb! Excellent Content
Great info on a fresh new topic
Made me think, A great learning experience
Great Work! Well Organized
Completely Shifted my thinking
One of the best seminars ever attended

Who should attend?

The program is designed for upper and middle management who are seeking to increase alignment, teamwork & collaborative innovation.

This session will prove to be highly useful for any group that needs better coordination, joint problem solving, communications across boundaries, and wants higher levels of human energy. Leaders that know that something is missing in their unit typically discover something powerful, energizing, and eye-opening.

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What others have said about our workshops:

(comments from previous sessions)

“First rate all the way!”

– Robert Gallant, CEO, Hercules America



“Really opened my eyes to a brighter world. I came away really understanding how I can impact a greater sphere beyond those I have been collaborating with both internally and externally. Frankly, I was truly inspired... It was dead on.”

– Dr. Malcolm De Leo, Director of Alliances & Technology Development, Clorox

“Robert Porter Lynch’s work represents an important breakthrough in the science and art of alliance strategy and management. It sets a new standard to challenge the alliance professional to think in new paradigms of opportunity and operations.”

– J. Michael Hopkins, Director, Business Development, AT&T

“Kept the program alive.....extremely interesting. Now we are ready for action.”

– Joseph Scherer, President, Sherex Industries, Ltd.

“Directly relevant. Probably the best course I've taken based on quality of instructor's materials, delivery, relevance to AT&T...bright and energetic class.”

– Mary Koppenheffer, AT&T

“Excellent content, well structured.”

–Dave Eckholm, Director Business Development, Land O'Lakes

“Robert Porter Lynch was so energized and enthusiastic about how we could benefit from knowing more about strategic alliances, I naturally wanted to know more and supported all efforts that would result in helping all of us to become better at what we do...It is quite an accomplishment to be an expert in a field but it is rare to find someone, like Mr. Lynch, who is also an excellent instructor and communicator.”

– Betty Dawson, Corporate Education and Training, AT&T



“The most compelling and insightful framework about alliances yet. Robert’s insights about how collaboration between companies is unexcelled. Senior executives will benefit enormously from his monumental work.”

– Paul R. Lawrence, Professor Emeritus, Harvard Business School



We are NOT Consultants; we are Resultants -- "Architects & Capability Builders" who deliver a tested and effective strategic system and process methodology that harnesses the innovative power of differentials across internal and external boundaries.

- We Design/Co-Create Collaborative, Alliance & Trust based Innovation Systems
- We Give Clients Long-Term, Sustainable Capabilities that Produce Results



While we do analysis and give advice, neither are our primary purpose -- our job is to co-create, with our clients, the most sustainable, regenerative system of useful competitive advantage through our Collaborative Innovation Architecture™