

A Structured Approach to Effective Partnering

Lessons Learned from
Public and Private Sector Leaders



Centers for Disease Control and Prevention
Office of Public Health Preparedness and Response

Introduction

The number of partnerships, alliances, and joint ventures has risen in recent years as organizations try to maintain a competitive advantage in a complex global marketplace.^{1,2,3} By sharing expertise, resources, and stakeholders, organizations that partner successfully are able to access new markets, spur innovation, and achieve greater outcomes.^{2,4} Partnerships provide additional benefits when used as a marketing or communication tool for stakeholders, with more recognizable partners publicizing the causes of lesser known entities.⁵ Recognizing the many benefits of collaboration, organizations are investing more resources in partnerships than ever before.⁶

The potential for greater realized returns through partnership does not come without risk; recent studies have shown that partnerships have a modest 50% success rate.^{1,7} Many partnerships fail due to lack of organizational investment, insufficient leadership commitment, and few dedicated resources.^{6,7} These hurdles are further exacerbated by complications such as undefined roles and responsibilities, poorly aligned capabilities, and cultural differences.^{6,9} A structured approach to managing these risks is essential, given the large investment of time and resources required to manage partnerships.

What is a partnership program?

A partnership program is an office or team tasked with managing and coordinating partnerships for an entire organization. Partnership programs create processes, policies, materials, and other support tools required to manage partnerships.

Comprehensive partnership programs address many collaboration challenges through visible leadership, coordination, and evaluation of partner activities.^{6,9} Leadership commitment to partnering establishes the importance of engaging external groups.⁹ Alignment of partner activities to prioritized strategic initiatives ensures that partners with the right capabilities to advance the mission are included.¹⁰ Dedicated program staff manage the entire partnership portfolio, providing a seamless experience for partners regardless of the individual project. Standardized processes structure partner engagements from the outset, enabling staff from both organizations to concentrate on achieving stated goals.⁷

To develop a structured, strategic approach to successfully engaging partners, we spoke with partnership program managers from seventeen public and private sector organizations that exhibit best partnership practices. The program managers were asked a series of questions about critical success factors for initiating, managing, and sustaining partnerships. Their responses serve as the basis for this paper, which also incorporates academic and industry research to provide an actionable framework for developing a partnership program.

Establishing a Partnership Program

Establishing a partnership program requires the development of several program components, presented in Figure 1. The process begins with the development of a strategic partnership plan to outline goals and required resources. Next, leadership aligns staff, funding, and other resources to the program. The combination of leadership involvement and organization-wide training reinforces a collaborative culture that supports partnership program development. Once the program is established internally, organizations can begin marketing themselves as potential partners to external stakeholders. Lastly, partnership programs measure progress against program and project goals to periodically reassess and update program strategies and objectives.

Figure 1: Partnership Program Considerations



Source: OPHPR OPPE

Developing a Strategic Partnership Plan

A partnership strategy outlines goals for the partnership program and the steps necessary to achieve them. The plan should define the role of partners in the larger organizational strategy, shape selection criteria for partners, define engagement strategies for partners, estimate program resources that will be required, and determine evaluation criteria.

An assessment of organizational capabilities and external constraints serves as the basis for defining the role partners will fill and specific opportunities where value can be contributed. Input solicited from existing partners and stakeholders, combined with strategic plan information, further reinforce areas that can be enhanced through expanded collaboration. Interviewees stressed the importance of setting strategy prior to engaging partners so that partnering is done with a clear purpose.

Once specific opportunities for engaging partners are identified, the plan should define criteria that can be used to target specific partners. Desirable partner characteristics, such as infrastructure, brand value, existing relationships, or subject-matter expertise can be used for ranking purposes. In addition, willingness and ease of partnering can be assessed by reviewing program links and degrees of separation through a stakeholder map or network diagram. Stakeholders closer to the organization on the network diagram, based on similar missions or other parallel factors, represent more attainable targets for start-up partnership programs. Engagement strategies will depend on existing relationships and perceived value that the potential partner may place on the program.

TIP *Partner with a Purpose* Partnership activities and projects should advance strategic objectives. Approach groups that share an interest in your mission or project outcomes.

Program resources, including staff quantity, training initiatives that may be needed, required policies and procedures, and other support tools are also included in the plan. At this stage, evaluation criteria for the program should also be determined, as well as a process for collecting and communicating program successes to internal and external audiences.

Investing in the Program

Partnership programs require dedicated resources, time, and staff with relationship management skills to initiate and sustain partnerships. Respondents overwhelmingly cited helpful and available staff as a crucial component of partnership engagement. A genuine willingness to listen and provide assistance spurred the growth of individual relationships. Hiring staff with business development experience and a strong customer service orientation foundation is a best practice.

→ **TIP** *Infectious Personalities* Partners respond positively to excited and passionate staff, which can quickly lead to a higher level of commitment and expanded collaboration.

Another important component of partnerships programs is staff training. Respondents established training programs and toolkits with talking points and key messages early on in the development of their program. In addition to training core program staff, organizations trained employees at all levels to identify potential partners, realizing that partnering opportunities may arise at any time. In this way, organizations instilled the concept of being open to and always listening for potential partnership opportunities throughout their staff. Finally, employees were provided with a process for transferring information about potential opportunities to dedicated partnership colleagues.

Processes and policies guide staff through individual engagements and define legal requirements that may impact partnering. Partnership program leads should establish standards that ensure partners have a consistent experience, regardless of individual project engagement.

→ **TIP** *Define "Partners"* Not all external organizations you engage will fall into the category of partners. Take the time to define criteria that make an organization a "partner" to avoid confusion.

Fostering a Collaborative Culture

Effective partner engagement requires a culture of coordination and inclusion. Executive leadership must foster this culture through endorsing partnering as a strategic, organization-wide priority and promotion of a partner-seeking mentality. This is further sponsored through the dedication of specific partnership resources internally and through tangible commitments to outside collaborative projects. Many respondents placed the partnership program at the highest organizational level to demonstrate importance and increase visibility.

Coordinating the partnership approach across business units ensures a consistent experience for partners, regardless of level of engagement. Respondents stressed the importance of establishing a common language when speaking about partnerships internally. Similarly, it was important for staff to understand organizational restrictions and complexities of initiating or structuring partnerships.

→ **TIP** *Cultural Alignment* Partnerships should not only reflect the goals of the organization but also the company personality and nature of work. Partner with the same focus that made you successful.

Marketing the Program to Stakeholders

Strong partnering organizations have a clear understanding of the value they offer to their partners and market it accordingly. Each value proposition is linked to an organization's brand and capabilities. Staff actively promote the organization's value to outside partners and are aided by strategic communications and marketing materials. Specific offerings may be tailored to audience need to increase potential partner interest.

Effective programs communicate shared partnership successes to continuously market overall program impact. Outside partners frequently stressed the importance of working with organizations that demonstrate a proven, effective approach to collaboration through verifiable, tangible outcomes. Interviewed programs communicated partnership successes through a variety of channels, but the most frequently cited included websites, partner forums, newsletters, and press releases. Leadership should reinforce the value of partnerships by actively communicating program successes.

Do all organizations need a full partnership program?

Large partnership programs with a portfolio of partners have dedicated staff for managing multiple external partner relationships across a variety of partner engagements. While smaller partnership initiatives, such as stand-alone projects or single partner engagements, may not be complex enough to necessitate a full partnership program, many of the cultural and engagement best practices discussed here can still be applied to mitigate risk.

Forums for sharing capabilities and priorities were cited as an important tool for expanding existing partnership activities. Additional resources used to drive cross-partner collaboration included online partner forums, in-person program reviews, conference presentations, and association meetings. The use of virtual collaboration tools has expanded to combat rising travel costs.

➔ **TIP** *Visible Leadership* Access to leadership demonstrates significance to staff and outside partners. Partnership contributions should be discussed, recognized, and valued at the highest levels.

Measuring Progress not Participation

Successfully completed partnership initiatives are the true gauge of healthy partnerships. Interviewees stressed the importance of establishing outcome-related measures. Measures related to achievements within individual partnership activities, such as reducing morbidity and mortality rates or project return on investment, served as success indicators. Process measures, like number of new partnerships, were not found to provide an accurate gauge of success. Furthermore, partners should jointly develop plans that are reviewed and revised annually to incorporate new initiatives.

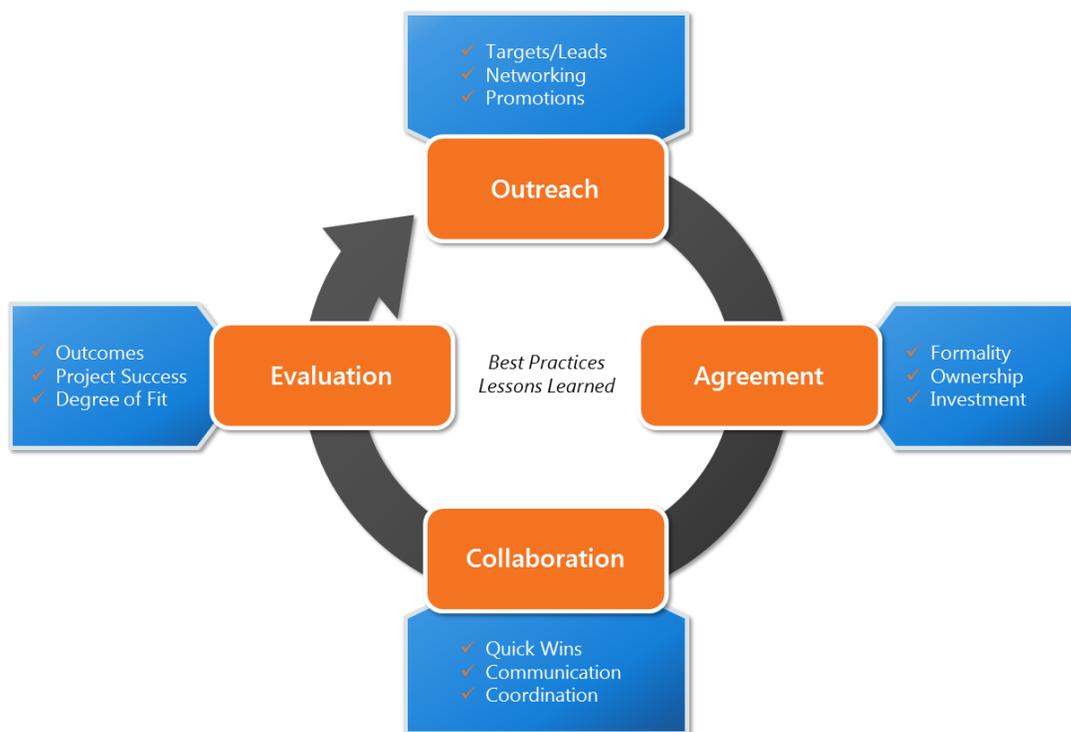
An initial baseline assessment of the existing partnership program can be used as a benchmark to measure progress against goals of the program over time. Evaluation of the partnership program should be done periodically through surveys of partners, key stakeholders, and internal staff. Executive leadership should also be regularly involved in and aware of their organizations' review measures. Findings should be used for continuous program improvement.

➔ **TIP** *Project Goals* Demonstrate partnership value through successful initiatives, projects, and improved outcomes. Let project measures illustrate partnership program effectiveness and results.

Nurturing the Partner Engagement Cycle

Establishing a partnership program provides structure for the organization's partnership activities. The next step is to engage individual partners in work activities to advance the mission of both parties. The partnership engagement cycle, shown in Figure 2, outlines the process for identifying, engaging, sustaining, and evaluating individual partners. The cycle includes four phases: outreach, agreement, collaboration, and evaluation. The phases of the cycle describe how to identify potential partners, how to engage with the targeted organizations, how to work together effectively, and how to evaluate the success of the partnership.

Figure 2: Partnership Engagement Cycle



Source: OPHPR OPPE

Gauging Mutual Interests

In the outreach phase, previously establishing strategic opportunities for partners to engage helps organizations identify potential partners based on criteria around specific opportunities. Attracting new partners often requires a business development approach. Networking at conferences, referrals from existing partners, and “cold calls” were examples of tactics used by interviewed organizations to generate new partnering opportunities. In initial conversations with potential partners, interviewees described their organization's project portfolio and capabilities at a high level, giving new organizations the opportunity to envision areas where they offer value and see common alignment. Once new partners are attracted, staff discuss specific projects or campaigns that could be joint ventures. These activities frequently lead to introductions and referrals to other prospective partners.

➔ **TIP** *Elevator Speeches* Any employee may be the first contact – sometimes in an unexpected location. Make sure they have the tools to evangelize the benefits of partnership with your organization. Supply your staff with key messages, ways to get involved, and contact information.

Determining Rules of Engagement

In the agreement phase of the cycle, partnerships are solidified and categorized. While some organizations partner informally and organically, others establish formal agreements using contract materials. Whether informal or formal, outlining ownership of individual project pieces and the resources committed by each institution is a best practice. Not all partners want to play an active role in the partnership; they may want to contribute monetary support or materials and let the other organization complete the work. A preliminary understanding of roles and responsibilities sets collective expectations and serves to mitigate potential conflict during project collaboration. At the conclusion of this phase, goals specific to the project or campaign are jointly set to measure success.

→ **TIP** *Saying No* Partnerships are a two-way street. Both parties need to be comfortable with the goals, activities, and investment. Protect your interests, when necessary, to reach true common ground.

Working Together Towards a Common Purpose

New partnerships should initially focus on “quick wins” that help build trusting relationships. Committing to tasks and then over-delivering emphasizes new partners’ willingness to do what is necessary for mission success. This approach also prepares new partners to engage at various levels as determined by mission progress. The level of progress is tracked by maintaining open and clear communication throughout partnership engagements. Communication is achieved through partner meetings, websites, and other social media tools. A genuine willingness to assist individual partners develops strong relationships and builds trust.

→ **TIP** *Quick Wins* Early successes reinforce commitment on all sides and generate momentum across the partner community. Build early milestones into the partnering plan.

Evaluating Partnership Fit

Assessments determine the future state of engagements with specific partners. Evaluation of individual partners should center on project outcomes as they are the best indicator of a successful partnership. Evaluations should also take into account the “degree of fit” between organizations. Fit refers to the matching of organizational values and culture that lay the foundation for creating sustainable bonds between partners. Some respondents maintained reserve partners to ensure that new partners could quickly take over mission critical roles in instances of questionable fit or voluntary partner exit, thereby avoiding disruptions in service. Positive evaluations lead to follow-on opportunities, often larger in scope, restarting the cycle. Lessons learned and identified best practices from each engagement should be incorporated into program activities to improve future collaborations.

When should we call it quits?

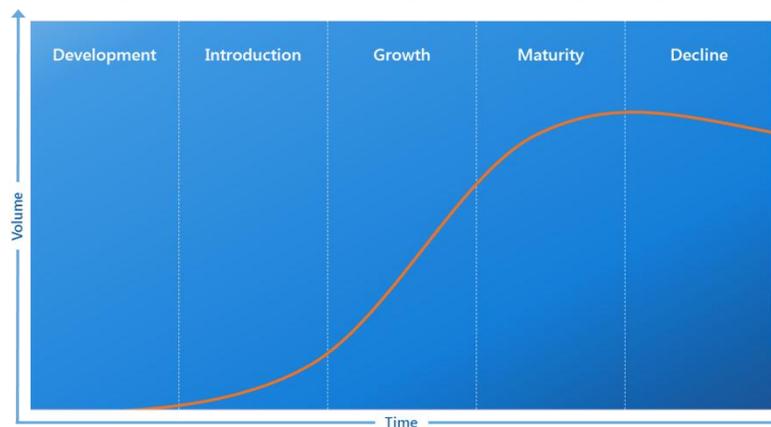
Ineffectually performing partnerships require intervention to get things back on track, such as: reevaluating collective goals, demonstrating a willingness to be flexible, or involving executive leadership. If both parties agree measures to resuscitate the partnership have been unsuccessful, it should be amicably dissolved.

→ **TIP** *Celebrate Loudly* Remember to not only share the credit but spread the word! Effective partnering organizations are attractive to external targets and internal recognition ensures continued success. Examples of internal recognition include newsletters, awards, and office-wide announcements.

Attaining Partnership Program Maturity

As programs mature, staff and resource capacity becomes the core driver of partnership activities. An awareness of a program's maturity level enables partnership programs to adjust resources to most effectively manage partnership activities. Organizations determine partnership program capacity by allocating dedicated resources to reach ideal partnership volume. Respectively, staff activities propel partners along their lifecycle to increase volume, but once reaching capacity, programs concentrate on optimizing partner mix, which shifts how resources are allocated and relationships are managed. Figure 3 represents change in the volume of partners over time for a partnership program.

Figure 3: Partnership Program Maturity Lifecycle



Source: OPHPR OPPE

During the initial stages, partner numbers generally grow slowly due to lack of awareness within the community or interest within the organization. Some organizations never move past this phase and mostly engage within their stakeholder network. The number of partnerships grows at a faster rate once organizations are comfortable working with others and making concerted efforts to collaborate. Early efforts should be focused on volume if the goal is to reach capacity quickly, but some programs take a more measured approach that reduces the rate of expansion in the interest of overall quality.

➔ **TIP** **Quality vs. Quantity** It takes time to build trust and give each partner the attention they deserve. Know your limits when taking on additional partners to avoid losing existing relationships.

The total number of partners plateaus after reaching resource capacity, though short-term increases may still occur around strategic projects or campaigns. At this point, programs should reevaluate existing partners to better align their portfolio of partnership activities with stated strategic goals. Mature partner organizations benefit from selectivity by focusing on those partners that introduce unique skills, resources, or stakeholders to the larger partner portfolio.

Staff skillsets required to manage partnerships also change over time as partnership programs mature. Initially, programs need to cultivate business development skills to become more efficient and effective in initiating individual partner relationships to grow program volume. As programs reach partner capacity, a greater emphasis should be placed on relationship management skills to maintain and expand existing partnerships. Recognizing this shift in relationship management activities enables partnership programs to adjust staff skillsets over time through training or hiring.

Conclusion

Successful partnership programs can reduce the risk of partnership failure by providing a structured, strategic approach to partnering. Tangible resources such as funding, staff, and training demonstrate a clear commitment to partnerships within an organization. A partner-seeking culture promotes identification of collaborative opportunities and freedom to engage new and existing partners. Tailored marketing materials communicate organizational value and past successes to attract new partners. Partnerships are evaluated on an ongoing basis in terms of both achieved outcomes and degree of cultural fit.

Successful partnering organizations position themselves as a partner-of-choice to promote competition among potential partners for both new and existing opportunities. This ensures their partnership portfolio includes a mix of organizations that are aligned with the strategic activities that best advance the mission. Over time, resources and skill sets are adjusted to match the changing nature of the maturing program.

As partnerships continue to grow in prevalence, those organizations that structure their approach to make the engagement process seem easy, understandable, and valuable to partners will attract more partners and realize the full potential of collaboration.

Key Takeaways

- A partnership program provides a structured, strategic approach for engaging in partnering activities, eliminating common partnership missteps.
- Partnership activities and projects should advance strategic objectives.
- Leadership commitment, dedicated resources, and staff training are critical elements to program success.
- A culture of partnerships encourages staff to recognize collaboration opportunities whenever they arise.
- Marketing materials should be tailored to appeal to individual partners.
- Discussions with current and potential partners about capabilities and ongoing projects can lead to additional partnering engagements.
- Provide all staff with talking points so that they may serve as program ambassadors at any event.
- Set engagement rules and expectations at the beginning of the project.
- Quick wins build trust and generate momentum across the partnership community, leading to additional partnership engagements.
- Evaluate partners based on project outcomes resulting from engagements.
- Communicate partner successes to attract new partners.
- Over time, program resources and staff skill sets must be adjusted from a business development to a relationship management focus to match the needs of a maturing program.

Research Methodology

To develop a structured, strategic approach to successfully engaging partners, we spoke with representatives from organizations that exhibit best partnership practices. Candidates for interview were identified through research and discussions with existing Centers for Disease Control and Prevention partners. The final list of organizations included a mix of federal agencies, private sector businesses, and non-profit groups seen as effective in their partnership approach. A total of nine non-governmental organizations were interviewed, in accordance with Office of Management and Budget (OMB) Paperwork Reduction Act (PRA) guidelines. All interviewees were partnership or program leads with first-hand knowledge of their organization's partnering strategy and activities.

Using the interview guide reproduced below, program managers were asked a series of questions about incorporating partnerships into an organization's strategy, determining and communicating value, and engaging individual partners. Interviewee responses, along with academic and industry research, were used to develop a partnership program development framework.

Best Practices Interview Guide

Partnership Strategy

- What drives you to partner with other organizations and has it changed over time?
- What role do partnerships and/or individual partners play in setting your strategic priorities?
- How do you set goals for partnerships? How often do you gauge progress against these goals?
- How do you make partners aware of ongoing activities and capabilities? How do your partners communicate their capabilities to you?
- How do you identify and initiate new partnerships?
- How have recent changes in the federal funding environment affected your approach to partnering?

Partnership Value

- Which of your partnerships have been most successful? Why do you think they were so successful?
- What value do you think you bring to your partnerships?
- How do you communicate or highlight that value? Do you incentivize partner participation in your network in any other ways?
- What are some of your biggest partner-driven accomplishments? How did you make others aware of your partners' contributions?
- What is your process for obtaining and validating partner success stories?
- How do you communicate success stories? Who is the intended audience?

Partner Engagement

- In your experience, what is the most effective way to engage partners?
- What level of engagement do your partners want from you? What information do they need?
- How frequently do you communicate with your partners? What communication channels/tools have you found to be most effective?

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Angela Schwartz, MBA

Associate Director Policy, Planning, and Evaluation

[Serena Vinter, MHS](#)

Partnership Team Lead

Authors

Amy Hoying, MBA
Nikita Sambourskiy
Brian Sanders, MBA

Other Contributors

[Rachel Ann-Akinyi Johnson, MPH](#)

[Seth Kroop, MPA](#)

[Diana Yassanye, MSeD](#)

