WHAT IS ISO 44001?

There is much talk about collaboration but for many the concept seems ad hoc and without a clear perspective as to whether it is collaboration, co-operation or just an alliance. ISO 44001 is the first international standard in the world to address collaborative business relationships. It does not represent a ‘one-size-fits-all’ solution but rather provides a consistent framework which can be scaled and adapted to meet particular business needs. The aim is to ensure that collaborative relationships are as effective as possible. And, even if the organisation does not seek accreditation, the framework itself provides a structured basis for collaborative working for the future.

The aim of the standard is to provide a framework to ensure collaborative relationships are effective and optimised. Collaborative approaches have been shown to deliver a wide range of benefits which enhance competitiveness and performance (for example, better cost management, improved time, resource utilisation, risk management and delivering incremental business value and innovation).

Increasingly collaboration is now not an option but a necessity and organisations should be reviewing their collaborative strategy on a regular basis. Collaborative approaches will cut across every function in an organisation. The process of integrating collaboration with business relationships of any kind has a life cycle. To maximise the benefits of a collaborative approach it is important to consider the longer term implications of our actions on value creating relationships. The initial stage is to ensure that an organisation has a clear mandate and strategy to undertake a collaborative engagement. This has to be clearly aligned with the vision, values and objectives of the business. Collaborative working in any form is not an easy option; it requires investment, resources and frequently changes within an organisation. And it needs backing.

Collaborative relationships in the context of ISO 44001 can be individual one-to-one relationships. But, more frequently they will involve multiple parties, including external alliance partners, suppliers, and internal functions. ISO 44001 maps the key areas that organisations should address, which are set out in this guide. Managing collaborative relationships can be a complex task. ISO 44001 provides a structured life-cycle route map.

Many organisations are already using the standard – examples include Network Rail, MoD, Skansa, Atkins, Siemens etc. Working with ISO 44001 enables partners to effectively share knowledge, skills and resources to meet mutually defined objectives and to provide new levels of value creation.
The objective of this Standard is to provide a framework that is integrated into an organisation’s established operations, activities, processes and procedures, to optimise the benefits of collaboration.

Like BS11000 before it, the collaborative life-cycle is based on an eight stage model. It provides the foundation to link collaborative approaches with the overall business operation whilst also focusing on the organisation’s capability to collaborate.

The standard addresses both the overall requirements to establish a management system and operational process requirements for specific or individual organisational relationship engagement. The framework addresses a number of themes that cascade from the high level management system and will vary within the context and maturity of a specific relationships life-cycle. These evolving themes impact the behaviours and organisational culture of collaborating organisations to ensure they are effective, optimised and deliver enhanced benefit to the stakeholders through collaborative approaches.

The introduction of the High Level Structure (HLS) by ISO enables organisations to better integrate their management systems and address the overlaps between multiple work streams. The development of ISO 44001 allows progressive integration of processes and systems by harnessing existing practices rather than creating independent applications. The diagram below illustrates the clauses which make up the new standard. While there is some information on clauses 4 -7 and 9 - 10 (Annex 1) this document focuses on clause 8 which provides the framework for collaborative working.
CHANGES FROM BS 11000

Whilst the structure may have changed the principles have not and so for those who have achieved BS11000 certification, the transition to the International standard should not create a significant challenge. The opportunity to build on the experiences of BS 11000 has provided some rationalisation and greater clarity of requirements.

While the number of requirements has increased, this has been largely due to the introduction of the ISO High Level Structure (HLS). In many respects these additional aspects fully align with ISO 9001 so for many organisations these additional requirements will be already addressed. The most notable changes are those that seek to underpin the key principles. Whilst some details have been moved to line up with the HLS in principle, the key requirements from BS 11000 have been retained to ensure the focus on the evolving nature of relationship development. The wording of some requirements has been simplified by moving guidance to Annexes within the standard and developed to support understanding.

The most noticeable change has been the increased focus on competence and behaviours which has been reinforced throughout the HLS and the life cycle. The impact of this will be to strengthen the needs to consider capabilities for collaborative working in the recruitment, allocation of staff, development of skills and performance evaluations.

The role of the Senior Executive Responsible (SER) has been elevated to the HLS but also reinforced throughout the operational phase to stress the importance of both executive sponsorship and proactive oversight of each relationship. The standard also now calls on SERs from partner organisations to be actively involved.

The important influence of the Exit Strategy has been reinforced both in terms of associated issues related to each part in a relationship but also by relocating requirements throughout the life cycle.

WHAT’S NEW?

A specific requirement has been introduced to:

- Focus on value creation and the establishment of a value analysis process.
- Consider the implications of the supply chain and extended enterprise.
- Ensure the evaluation of the business case has been specifically identified and expanded.
- Highlight the need for a more defined engagement strategy.

So in real terms the ISO standard should be easier to work with whilst creating greater focus on those issues that help to build sustainable relationships.
The HLS is structured based on standard clauses 4 – 10. Further details are in Annex 1.

In BS11000, the standard followed a three-phase approach covering eight stages. In the ISO standard, the detailed specific requirements for establishing, developing and managing third party relationships utilising the eight stages have been addressed within Clause 8 (Operations) reflected in the lifecycle model in the collaborative business relationship framework. We look at each of these in more detail below.

**STAGE 1 - OPERATIONAL AWARENESS**

**Duties of Senior Executive Responsible (SER)**
- Whilst the role of the SER is established at a corporate level for practical reasons some responsibilities may have to be delegated.

**Application and Validation of Operational Governance Structure**
- Ensures that any appropriate operational governance structure established promotes collaborative working and leaders are empowered to explore the potential value from collaboration.

**Identification of Operational Objectives**
- It is crucial that the adoption of a collaborative approach is clearly aligned with the business goals and objectives and the organisational change that may be required.
Establishment of Value Analysis Process

- Adopting a collaborative approach must clearly offer greater tangible benefits than a more traditional ownership model. It should be focused on a robust analysis of a cost-effective solution.

Identification and Prioritisation of Collaborative Business Relationships

- Historically terms such as partnering or collaboration have been used too liberally and frequently when not appropriate. A clear differentiation of relationship types enables organisations to focus resources more effectively.
- Perhaps the most crucial decision is how organisations differentiate their relationships and focus their resources effectively. The spectrum of relationships and specific needs and strategic requirements will be many and varied.

Verification of Collaborative Approach

- Promoting collaboration may be at odds with current thinking. Benefits often need to be articulated and understood including the long term advantages. Understanding what drives an organisation and that of customers/suppliers are important features of the development process. If these are not understood, then opportunities may be missed.

Planning for Operational Collaboration

- Specific collaborative developments will need planning how such approaches will be integrated into operations.

Development of Competencies and Behaviours

- Working in a collaborative environment may not suit everyone. Defining key individuals and the capabilities and skills for operating in a collaborative relationship will be important. It is essential to understand what skills, competencies and behaviours are available and what development may be necessary. Selecting the right people is crucial.

Initial Risk Assessment

- Every business venture carries some risk and managing this is a key aspect. Collaborative approaches can introduce alternative ways of managing risk, including a joint approach with partner(s). It can also introduce new risk elements that need to be identified including those associated with the potential collaborative business relationships and the impact of breakdowns in those relationships.

Establish Relationship Management Plan (RMP)

- Creating a RMP will help to capture the concepts and provide a platform for development with the partner(s). It is critical that this evolves over time, reflecting different relationships at different levels of maturity.
STAGE 2 – KNOWLEDGE STAGE

Having identified the potential for collaboration the next stage is to develop specific strategies and risk management that will deliver the required outcomes. This includes establishing the purpose and whether you have the skills to support the complexities of these integrated approaches.

Strategy and Business Case Development

- The challenge is to develop an effective strategy that integrates the ideas into a practical approach to meet the business objectives and expectations of the potential partners. This includes analysis of the direct implications of the collaborative approach, the needs and expectations of customers and other stakeholders.

Identification of Specific Relationship Objectives

- Understanding the objectives and drivers for collaboration is essential, these need to be compatible with the overall objectives of the organisation. Understand these and ensure they are transparent to all.

Implementation of the Value Analysis for a Specific Opportunity

- Undertake an initial value analysis to ensure there is sufficient potential value to be obtained through a collaborative approach to justify the investment and risks.

Identification of Potential Collaborative Partner Organisations

- Organisations need to consider who may be best placed to fill the gaps as potential partners. This should be based on identified criteria. In some cases these partners may come from existing relationships, but it is important to recognise both their traditional stance and their potential to change the rules of engagement.

Development of Initial Exit Strategy

- A key aspect of developing a strategic approach is to consider the Exit Strategy as an essential component upfront. Understanding the issues that will arise from disengagement will highlight aspects to be addressed in development. As relationships may be time bound and/or affected by changes in circumstances or the working environment, part of the strategy should include the implications of exiting the relationship at some point. This may highlight key aspects that must be part of the overall plan for implementation.

Identification of Key Individual’s Competences and Behaviours

- It is important to consider and identify that key individuals, their roles, and the available resources to support a collaborative approach. Undertake a joint assessment of the competencies and skills of those to be
engaged in delivery and, where appropriate, agree a joint development plan. It is important to put the emphasis on selecting and developing those individuals with the necessary behaviours.

**Knowledge Management**

- One of the significant benefits of collaboration is the ability to share knowledge with partners. This frequently creates a challenge for many organisations to identify what can and cannot be shared in order to achieve the objectives, and avoid problems later. The effective exploitation of knowledge is the key to success, creating the environment necessary to ensure the sharing of knowledge should have a clear focus.

**Supply Chain and Extended Enterprise Threats and Opportunities**

- As a key aspect of evaluating collaborative opportunities is assessing the risks and opportunities arising from harnessing existing or potential partners/supply chain relationships. These extended relationships may open up further benefits and opportunities whilst at the same time they may introduce further risks.

**Risk Assessment**

- Risk management in respect to relationship management shall be integrated into the overall risk management processes. The organisation needs to identify and evaluate risks using defined processes and ensure these address the concerns of all parties. This should include for example, the impact of a breakdown on the relationship and maintaining business and other issues.

**Evaluation of the Business Case**

- Having identified a specific opportunity and the potential application of a collaborative approach it is important to evaluate the business case before proceeding. This will ensure that the objectives, potential benefits and opportunities, are balanced against for example – risk, key resources, and the estimated lifecycle/length of relationship.

**Incorporation of Knowledge into the Relationship Management Plan (RMP)**

- When a strategy has been established, the RMP will help capture the key principles. This should be reviewed at defined intervals, and will provide the communications and information platform that will help to raise awareness across the organisation.
Most organisations are very good at defining what they want from others but perhaps less aware of their own capability to meet the demands of collaboration. A collaborative relationship requires commitment on all sides. This includes the leadership, skills and motivation which will govern the behaviours and approaches. Understanding the internal enablers that build trust between the parties based on mutual benefit and equitable reward is important. This is not just about processes, procedures, systems and contracts.

**Capability and Environment for Collaboration**

- In selecting teams it is important to focus on those individuals who will best respond to the challenges of collaboration. It is unlikely that organisations will have all the skills ready to take on a collaborative role. Recognising the gaps and building in capability development is important.

**Assessment of Strengths and Weaknesses**

- The organisation should consider the extent to which current operating practice may support or constrain effective collaboration, then address these issues. These can include organisational structure, previous collaboration experiences of the organisation, experience and capabilities of individuals, and behavioural and cultural competencies.

**Assessment of Collaborative Profile**

- The organisation shall assess the effectiveness of its operations in the context of collaborative business relationships and carry out a review of the organisation’s collaborative profile. There are a variety of models that can be used to provide a platform on which to assess your organisation. For collaboration to work effectively, potential partners must see each other as someone they can work openly with.

**Appointment of Collaborative Leadership**

- The key to successful collaboration comes from having the most effective leadership. Appoint leaders with the appropriate competencies to take the strategy forward. The skills and behaviours necessary in a collaborative environment may include openness, honesty, responsiveness, and influence. Leaders need to be able to engender and maintain the ethos of collaboration by both supporting and mentoring those involved.
Definition of Partner Selection Criteria

- Organisations need to establish the criteria in each case for a collaborative partner. This provides a basis for evaluation later in the process. This should include the organisation’s collaborative capability and relationship management approach. The criteria could include for example, collaborative profile, experience and cultural compatibility.

Implementation of the Relationship Management Plan (RMP)

- Once collaboration has been validated as the strategic way forward, the organisation should develop a specific Relationship Management Plan including responsibilities to be assigned with target dates, establishing who does what, by when.

STAGE 4 – PARTNER SELECTION

Collaborative relationships can be utilised in many different circumstances and finding the right partner should not be left to chance. Often the selection process is by default or based on long term experience in a traditional relationship. This may not always be the best criteria. It is important to understand the differing dynamics of a collaborative approach and to assess the strengths and weaknesses. To build confidence in the selection process the approach should define what success looks like for all involved.

Nomination of Potential Collaborative Partners

- Whatever the drivers for collaboration, it is important to have a clear perspective on which the potential partner(s) might be. It is unlikely that every potential partner would meet the aspirations and it is sensible to prioritise the business objectives. A collaborative profile of the potential collaborative partners should be evaluated against the organisation’s internal assessment to identify the organisational fit.

Partner Evaluation and Selection

- Many organisations will have established processes for partner selection and these should be followed as the starting point to seek out the ideal collaborative partner(s). The aims of the collaboration need to be defined together with the relative value that will be placed on their collaborative capability. Using the standard as a reference point can be useful.
Development of Engagement and Negotiation Strategy for Collaboration

- Perhaps the most difficult aspect of creating a collaborative approach comes through the process of negotiation. The implications of the style of negotiation can be far reaching. The nature of the negotiations will set the tone for the future relationship and the end is always kept in mind. The emphasis should be based on business strategy, objectives, intended principles for working together, and take into account the longer term stability of the relationships and not focus solely on short-term opportunism.

Initial Engagement with Potential Partners

- A sustainable relationship requires consideration as to the steps taken in engaging with potential partners. This will include encouraging the potential partner organisations to adopt the principles of collaborative working within their own organisations, a joint assessment on their objectives and requirements for a collaborative relationship and identify and evaluate risks and opportunities.

Assessment of Joint Objectives

- Throughout the selection process the organisation should work with the potential partners to understand their objectives, as well as building a dialogue around common objectives and outcomes. These may not always be the same as yours but should be evaluated for alignment and compatibility. Collaborative initiatives should be focused on the premise of significant strategic benefits.

Assessment of Joint Exit Strategy

- In considering the implications of a collaborative engagement the potential partners should jointly evaluate the key aspects of disengagement. Establishing potential triggers and rules of disengagement, possible transition and future development during the partner selection and contracting stage builds confidence between the parties.

Selection of Preferred Partners

- How organisations expect they will be working together will help to define the nature of the contracting relationship and the style of integration and level of interfaces. This will have a significant impact on the development of risk management approaches.

Initiation of Joint Relationship Management Plan

- The partners should confirm the principles on which the joint relationship management and formal arrangements will be based.
Once the partner(s) are selected, the focus shifts to ensuring that the relationship is placed on a sound foundation. Establishing the right platform on which to create a collaborative relationship is crucial. It is important to work jointly on setting out the appropriate governance model that will support collaborative working.

Effective and sustainable collaboration requires a robust approach to both organisational development and collaborative behaviours. This starts with a focus on individual and joint partner objectives, together with agreement on roles and responsibilities. To establish a working platform on which collaboration can deliver the benefits of combining skills, resources and driving innovation, there must be clear governance that is supported by integrated business processes, measurement and people development.

### Establishment of the Joint Governance Structure

#### Joint Executive Sponsorship

- As operations are likely to reach beyond those initially involved in establishing the relationship, it is important that there is joint executive sponsorship to provide overall support. The partners should ensure there is a mutual agreement to support the joint approach, with a clear definition of management systems, authorities, performance and expectations. This includes behavioural principles that will govern the collaborative behaviours of those involved.

#### Validation of Joint Objectives

- There needs to be clear and transparent agreement on the desired outcomes and objectives of the relationship. This must also reflect joint ownership of the principles that will govern the behaviours of those involved. Joint objectives should encompass the specific needs and drivers of the individual organisations.

#### Operational Leadership

- The assessment and appointment of competent leaders is crucial to deliver the required outcomes. The assessment should cover individual capabilities and the interaction between individuals in each organisation. The assessment should include the following:
  - Collaborative capability and experience.
  - Individual appreciation of collaborative approaches and aptitude for collaboration.
  - Commitment to collaborative working.
  - Identification of appropriate training and development needs.
  - Collaborative behavior.
  - Behavioural competence.
Joint Management Arrangements

- Establishing a joint management team (JMT), together with a clearly defined profile of roles and responsibilities, ensures that all participants fully understand their contribution. The JMT will for example, review the joint objectives, including continual value creation, the information required to meet the objectives together with any known interdependencies, and establish the internal and external context for the business relationship taking the human and cultural factors into account.

Joint Communications Strategy

- A key aspect of maintaining a sound relationship between organisations and their stakeholders is to ensure there is an effective process of communications. This should include the vision, the objectives behind the collaboration and how concerns will be addressed.

Joint Knowledge Management Process

- The JMT identifies the information needed to meet the agreed objectives. They should also agree what information may not be shared.

Establish Joint Risk Management Process

- A robust joint risk management programme incorporating issues, identified on an individual organisational basis, those resulting from any interdependency is important, including those of the partners, which may impact the relationship. This should also cover the exit strategy. An effective collaboration is one where the parties share responsibility as far as is practical in supporting the individual risk of the partners.

Operational Process and Systems Review

- The JMT will review and assess the potential impact of collaboration for the partners. The assessment will include for example, priority areas for immediate actions to implement the collaborative approach, management of change to enable collaborative working, and management of continual improvement processes.

Measurement of Delivery and Performance

- The collaborative partners shall agree plans for delivery and performance based on the objectives and how these will be measured. This should include a process of continual improvement to enhance the effectiveness of its collaborative business relationship arrangement. This should also include monitoring the strength of the relationship. Performance incentives must also support required behaviours.

Improvement of Organisational Collaborative Competence

- The partners will evaluate its ongoing ability to collaborate. This evaluation shall include on-going collaborative competencies and behaviour.
Establishment of a Joint Issue Resolution Process

- It is important to ensure that there is an issue resolution process to identify and resolve issues at the earliest practicable opportunity. The process should provide include a mechanism for integrating the outcome with lessons learnt.

Establishment of a Joint Exit Strategy

- It is important that the exit strategy addresses the considerations of all parties involved. The boundaries of the relationship clearly should be established. Potential areas of conflict should be identified.

Stakeholder Impact

- It is important when establishing an exit strategy to consider the potential impact on stakeholders.

Assets and Commercial Implications

- The organisations need to ensure that the joint exit strategy satisfies the requirements of the collaborative arrangement. For example, financial and commercial settlements.

Management of Staff

- Effective support is necessary to address the implications for staff working within the relationship.

Agreement or Contracting Arrangements

- The organisations shall establish whether the collaborative business relationship is to be covered by a formal or informal agreement and/or contract. Whatever contracting model is used should be jointly agreed and evaluated against the relationship approach and be compatible with the joint principles, aims and objectives. All performance requirements and measurement methods should be mutually agreed to ensure clarity.

Establish and Implementation of Joint Relationship Management Plan (RMP)

- When the decision is made for one or more organisations to work together the RMP becomes a joint plan. This will outline the way they intend to manage the relationship in future. The JMT should prioritise all actions necessary to implement the collaborative process to align with the joint objectives.
STAGE 6 – VALUE CREATION

Experience suggests that relationships will tend to plateau over time if they are not driven to maintain continual improvement. Relationships which are particularly focused on long term benefit must maintain a relevance to customer needs. One major value from collaborative approaches comes from the ability to share ideas and harness alternative perspectives. This helps engender improved engagement across partners.

To exploit value creation means challenging traditional thinking. How organisations choose to encourage innovation depends on a wide variety of factors. Establishing joint cross-functional teams to address specific challenges or ideas brings the additional benefit that introducing a structured approach to value creation supports organisations and teams working together. Innovation is crucial to maintaining a competitive edge for the relationship and the partners but there also needs to be a structured approach to their implementation. Whilst there may be many common opportunities, it is also important that some aspects may, on occasion, only benefit one party. Support for these is equally important.

Establishment of the Value Creation Process

- Establish a joint approach to innovation that ensures targeted support and also encourages new ideas. A structured approach will underpin the sustainable engagement, provide a measure of integration and continual focus on driving greater value from the relationship. One of the major challenges in any relationship is to define what value means for those involved. This is the responsibility of the joint management team and executive sponsors. These longer term values may be common or complementary.

Identification of Improvement and Setting of Targets

- The JMT shall ensure that issues, risks and opportunities and areas of improvement identified are supported by an impact analysis to support implementation across organisational boundaries with target options set. The key to optimising co-creation is to ensure that identified issues are regularly reviewed and, where necessary, removed if not delivering. This ensures resources are not wasted or diverted from the primary objectives. In a collaborative environment, value creation is about delivering innovative solutions or releasing value that could not be generated by one organisation alone.

Utilisation of Learning from Experience

- As organisations begin to work together more closely it is equally important to capture the lessons learned. This is a key aspect of creating value and setting the agenda for innovation.
Updating the Joint Relationship Management Plan (JRMP)

- The JRMP should be updated to incorporate value creation initiatives which after evaluation and development, as required, are to be incorporated into the operations.

STAGE 7 — STAYING TOGETHER

Business relationships will likely change over time. This may be as a result of either internal and external factors or pressures. Even where partners have invested in creating a firm foundation and governance, the people involved will develop or move on and this will change the dynamics of the relationship. This is a strong reason for embedding the collaborative practice in the operating model. In order to continuously achieve performance goals, it is crucial to establish a programme that works to maintain a sustainable relationship through ongoing joint management.

Oversight by the Senior Executives Responsible

- The SERs shall oversee the joint management team, undertake regular reviews, provide overall support to successful delivery, overcome potential internal barriers, manage challenges within the collaboration as they arise and promote overall collaborative behaviour and trust while demonstrating supportive behaviours.

Management of the Joint Relationship

- The key to sustaining relationships is to ensure there is effective joint management focused on the operational level, managing the day-to-day activities of the relationship and ensuring continued focus and support. Maintaining the defined behavioural principles is equally important.

Implementation of Monitoring of Behaviours and Trust Indicators

- The JMT, with the support of the SERs, shall implement a defined process for the ongoing monitoring of behaviour and trust indicators within the collaboration. Developing trust in the relationships and ensuring the appropriate behaviours is a key aspect of joint management. Inappropriate behaviours will quickly undermine the relationship with the obvious impacts on output.

Continual Value Creation

- There should be continuous support and monitoring of innovation and continual improvement to ensure the teams are exploiting their joint knowledge. The JMT should regularly challenge to generate fresh ideas and revitalise the relationship.
Delivery of Joint Objectives

A critical aspect of any relationship is that it delivers the outcomes agreed and ensures that they remain relevant throughout the lifecycle of the collaboration. It is crucial that while it is important to develop the relationship, the prime objectives and contractual requirements must be met.

Analysis of Results

It is important to understand and agree how the performance of the contract and the relationship will be jointly measured and ensure appropriate reviews are undertaken. Results of the monitoring, measurements and evaluations are reviewed at the most appropriate level of management in order to take any required corrective actions or to facilitate identified improvements.

Issue Resolution

Inevitably issues will arise and too often these are left to fester until they can in some cases irreparably damage the relationship. It is important that there is a robust approach to identifying and managing issues. The JMT and their SERs should implement the process for issue resolution to ensure that issues are addressed at the appropriate level. Personnel should be empowered and encouraged to resolve issues at the appropriate level.

Maintenance of Joint Exit Strategy

The JMT should regularly evaluate changes in the organisation, business environment, personnel, performance and market to assess their impact on the business relationship and update the joint exit strategy as necessary.

Maintenance of the Joint Relationship Management Plan (JRMP)

The JRMP should be regularly reviewed with the SER to ensure it remains applicable and updated where necessary.

STAGE 8—EXIT STRATEGY

The exit strategy is in fact a key aspect that should be addressed as part of the initial thinking and carried through the whole life cycle. The strategy should focus on how the parties plan to disengage when necessary and ensure effective business continuity and customer support. A strong relationship will recognise the value of seeking to monitor the changes and ensure that the concerns and needs of each partner are duly addressed.

It is important to recognise that although one particular initiative may come to its useful end due to a variety of factors, others may, and should, emerge from successful collaboration. Effective disengagement, and how this is viewed
internally and by the market, is crucial to the reputation of the parties. Whilst it may be appropriate to cease activity, how this is presented and interpreted will influence the way each party proactively approaches disengagement.

Many people may consider that to address an exit strategy at the outset of a relationship infers an acceptance that the relationship will fail, but this is not the case. Experience suggests that being open about all possibilities allows the partners to focus on every aspect of integration.

**Initiation of Disengagement**
- Where the partners mutually agree that the current collaborative programme has reached its natural conclusion, the JMT should implement the joint exit strategy. This should take into account all commercial considerations, accountabilities, agreed objectives and implications for those personnel involved.

**Business Continuity**
- The foundation of a sound relationship is while it continues to add value, it must also recognise the implications of maintaining continuity for both the partners and their customers. Terminating any collaborative initiative needs to be effectively orchestrated by the partners. This is particularly important where service provision is being transferred to another party.

**Evaluation of the Relationship**
- Collaborative integration offers the opportunity for organisations to extend their individual capabilities and market reach through combined operations. The partners will evaluate the relationship and document lessons learned both internally and in the joint relationship.

**Future Opportunities**
- The partners shall jointly consider future opportunities for collaboration based on their experience.

**Review and Updating of the Relationship Management Plan (RMP)**
- The organisations should review and update their RMPs with the lessons learned from the exit strategy.
ANNEX 1 - OTHER SECTIONS OF THE STANDARD

The context of the organisation (clause 4) seeks to set the overarching rationale for the adoption of a collaborative business relationship approach. This includes understanding the needs and expectations of stakeholders, where value can be created through adoption, where the scope of collaboration and the system requirements which will be followed.

Leadership (clause 5) outlines the key requirements for the executive level and leadership to identify the objectives for collaboration, develop and implement policies and processes, allocation of resources, ensure effective communication, assign a Senior Executive Responsible (SER) for overseeing the collaborative working and establishing a robust internal governance structure to ensure effective operations.

Planning (clause 6) focuses on ensuring that effective risk and opportunity management is in place aligned to the its operational objectives and identify where these may be supported or enhanced through the adoption of collaborative working approaches, or where additional external partners may be required in order to achieve targeted outcomes. The organisation should identify its significant internal and external relationships, target areas where collaboration can open new strategic opportunities either from its existing partners or from the identification of potential new collaborative partners.

Support (clause 7) establishes the platform to ensure the appropriate allocation of resources, appropriate competences and behaviours to support a collaborative approach together with reinforcing the awareness of personnel of the policies and processes to be adopted and that these are fully documented and maintained. A corporate Relationship Management Plan is also needed.

Performance and Auditing (clauses 9-10)

As with any management systems approach it must be effectively maintained and reviewed to ensure its continued appropriateness. Whilst collaborative application may involve multiple parties the corporate processes and systems need to be maintained as well as harnessing experiences. The elements outlined in the standard are:

- Performance evaluation.
- Monitoring, measurement, analysis and evaluation.
- Exit evaluation.
- Internal audit and audit programmes.
- Non-conformity and corrective action and continual Improvement.
- Management review.
- Improvement.
Developing your Collaborative Capabilities

Our structured approach to effective partner and supplier relationship management is designed to support businesses move to world class performance through:

- Building and supporting capabilities in implementing and managing alliances.
- Creating and developing a collaborative culture.
- Organisation Partnering Indicator (OPI) – we offer a tool to analyse the characteristic partnering style of an organisation or business function.
- Mentoring and organisational support to promote collaborative alliances between businesses and their suppliers.
- Developing effective cross-functional collaboration.
- Building and developing effective relationships.
- Facilitating the design and implementation of service driven collaborative initiatives.
- Facilitating self-assessment and gap analysis of collaborative practices.
- Evaluating collaborative working.
- ISO 440001 facilitation.

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