



9 STEPS OF COLLABORATION

Step 1 Exploratory Conversations

- Assess general interest in service/product offering
- Gather information around business objectives/challenges where your offering can have an impact
- Identify the linkage between challenge resolution and achieving business objectives/goals

Step 2 High-Level Opportunity Assessment

- SMEs review information collected during Preliminary Conversations
- Apply “Opportunity Qualification Metrics”
- Create “Executive Presentation” IF opportunity is “qualified”

Step 3 Executive Presentation

- Describe the areas of opportunity for positive business impact
- Explain the process for exploring opportunities using a “shared risk” model
Guided Discovery → Opportunity Opinion → Technical Assessments → ROI Analysis
→ Implementation
- Collaboration
 - Why and how collaboration is key to success
 - The importance of executive sponsorship to ensure
 - Business/economic needs drive the process
- Executive brainstorm
 - Identifying top business opportunities and/or challenges that can be positively impacted in a substantial way
- Executive Sponsor Identified

Step 4 Stakeholder Presentations

- Same as Executive Presentation but includes a “Stakeholder brainstorm”, primed with output from Executive brainstorm
- Stakeholders are identified by Executive Sponsor
- Stakeholders identify Key Persons to be interviewed

Step 5 Key-Person Interviews

- Key persons are interviewed within departments identified by Stakeholders as having potential for product/service to make a worthwhile impact
- Information gathered is used to complete Guided Discovery Document

Step 6 Guided Discoveries

- A discovery process is carried out with Key Persons (and others) that will allow client to assess where product/service can have the greatest impact
- Results of discoveries are presented to Executives and Stakeholders in the form of an Opinion

Step 7 Detailed/Technical Assessments

- Conducted ONLY in areas where client (through Guided Discovery) identifies opportunity THEY want to evaluate more closely

Step 8 ROI Analysis

- Financial analysis is completed based on proposals generated using information collected from Assessments

Step 9 Implementation

- Implementations carried out only when client feels the ROI (economic or otherwise) establishes a compelling case for leveraging the benefits of product/service