



# Michelle Whitehead

Business Serenity Through Wise Management & Legal Support

## Collaborate with Confidence Checklist

ARE YOU CONFIDENT THIS ISSUE HAS BEEN ADEQUATELY COVERED?	YES	NO
Start by discussing your business and strategic goals. Are they in alignment? If your future hopes, plans and dreams for your business are not compatible then resentment is more likely to arise. Either rethink the collaboration or ensure it is limited to a very well-defined short term project.		
What skills and resources does each business bring to the collaboration? Are these likely to clash, or complement and support each other? Have you got a clear idea about each party's strengths and weaknesses?		
Think about the power dynamics. Is there equality of size and capacity? A David and Goliath collaboration can work, but it requires extra care to ensure each party's role is recognized as valuable and that the relationship is mutually beneficial.		
Get clear on your values. What do each of you believe in and hold dear? What principles do you believe the relationship should be based on? Are your visions compatible?		
Every collaboration needs an objective – an end goal. It is time to think about what you are working towards. In every collaborative relationship, there will be shared goals and individual goals. Have you clearly identified these for each party and for the collaborative relationship?		
How do each of you like to work? What is your operating culture? That is, the way you do things, your attitude to work. If one person loves structure, and strict compliance with policy and procedure while the other person prefers to wing it and make things up as they go along, your collaborative relationship is likely to be problematic. Be honest! Are your operating cultures compatible?		
Now we need to talk about money. What financial resources are each of you bringing to the relationship? This does not just mean a shared financial pool (which is a good idea for meeting expenses of the collaborative relationship). It is also important to consider whether each business can maintain and support themselves while working towards the collaborative goals. Are each of you in a sufficiently stable financial position to sustain your commitment to the collaborative relationship?		

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Take some time to think about the systems, processes and procedures that will be required for the collaboration to operate smoothly. Have these been documented and are you confident they will be complied with? This could include record keeping, streamlining delivery, and management of client relations, among other things.		
Have you thought about how the collaborative relationship will be managed? If there are teams involved, is there a clear and aligned management structure? Have you considered how you will manage mutual accountability?		
If there are many people or larger organisations involved, are you clear on the governance structure? Do you need to nominate individuals who have leadership responsibility for the collaboration?		
Successful collaborations are based on mutual dependency. That means you each need each other. Have you considered whether this collaborative relationship is both necessary (i.e. neither of you could achieve the goals that you have identified above without entering into this relationship) and sufficient (i.e. the collaborative relationship is capable of achieving those goals)?		
The biggest cause of breakdown in a collaborative relationship is lack of communication. Stop and think about the communication patterns you have observed in the relationship so far. Do you have any concerns? Are you able to communicate those concerns openly to the other people in the relationship? Do you feel heard? Can you each discuss differences of opinion calmly and negotiate win-win solutions? If you gloss over this issue or suppress your different opinions now, you are likely to regret it later.		
Have you created a plan to ensure good communication continues to occur throughout the project? This can include things like scheduling regular meetings, accountability reporting and ongoing review of your goals, progress and work plans, including this checklist.		
Time to explore the risks involved in this collaboration. Risk can be both positive and negative, opportunity and threat! Risk is simply any area of uncertainty. What risks might have a positive effect on your collaborative relationship (for example, the risk that it will be successful beyond your wildest dreams)? What problems could that cause? Can you put an action plan in place that will help you exploit that risk if it occurs? What negative risks - potential dangers or loss - do each of you face if the collaboration fails? Can you put in place a plan to lower the likelihood of a negative risk eventuating or minimise the effects if something does go wrong?		

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Do you have a dispute resolution strategy? Many collaborations end up in expensive legal disputes because they didn't put enough thought into solving problems BEFORE they arose. Figure out now what you are going to do if things start to go sour between you. Will you agree to try to negotiate and make legal action a last resort? Will you immediately cancel the agreement – what does that mean in terms of your commitments to each other and to third parties? Will you enlist the help of a trusted third party to mediate between you?		
Have you created an exit plan? Do you know when the collaborative relationship is going to end? Is it on a specific date, when a specific goal is achieved, or simply when you no longer want to work together? How will you know that time has come and - more importantly - what happens next? It is very important to discuss what needs to happen in order to dissolve the relationship cleanly and without stress – and to do so at a time when everything looks rosy and you are still happily talking to each other!		
Finally – and this is the biggest consideration of all – you are ready to map out the nitty gritty details of your collaborative relationship – your WORK PLAN. Lay out each party's commitment in terms of resources, time and energy so each party knows exactly what it needs to do. Think about whether you have covered all aspects - “what, where, when, why, how and who” – for each obligation that you list. Getting up close and personal with all of the specific details of how you will work together now is essential to the success of your collaborative relationship. Your WORK PLAN might need to be divided into phases, and should take into account the preliminary stages such as obtaining financial and legal advice and setting up the structures, procedures and policies, as well as the substantive details of the actual collaborative project. Is your WORK PLAN ready to go?		

Finished? Got a lovely row of YES marks? Congratulations! You have made a great collaborative start and have dramatically increased your chances of success. Don't throw this document away, though. Keep it – with all the notes you have made – as a living reminder of what is important. For longer term projects, make a commitment to revisit this checklist from time to time, to ensure that these elements remain current and accounted for.

This document is a general starting point for preparing an agreement to collaborate but it is not comprehensive enough to stand alone (nor is it a substitute for legal advice specific to your situation). There are other issues you need to consider (confidentiality and intellectual property for example). If you have any concerns or questions you can book a free consultation with me here: [http://bit.ly/MMW\\_consult](http://bit.ly/MMW_consult).