

Partnership PLAYBOOK

Your guide on how to join forces with other business owners, non-profits and sponsors—for impact, for influence, for profit, and to change the world.

Creating Seamless Systems

Congratulations! You have spent quality time defining the characteristics of great partners. You have done your due diligence, talking in depth with your partner, and researching the work and impact they have had in the past. You have thought about the legal components of your business relationship, and made decisions about how to split the money, protect everyone's intellectual property, and provide a clear path if either partner wants to leave or change the partnership in the future.

Are you ready for the fun part, creating the content and interacting with real, live customers?

In this lesson, we want to help you understand:

1. What information you need to track and share openly with your partner
2. How to develop content efficiently and effectively
3. How to design a smooth and seamless customer experience
4. Which simple tools you can use to track content development and finances

Our Expert

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What do you need to track?

During the content development, marketing and delivery stages of the partnership, it is critical to share information openly and frequently with all partners.

In particular, you should share:

Financial information

- ★ Income
- ★ Expenses
- ★ Payments to both parties

Customer information

- ★ Contact information
- ★ Correspondance
- ★ Issues/grievances

How to develop content efficiently

You can waste a lot of time if you don't set up a clear way to develop content. Here are some tips:

Clarify learning objectives

What do you want the participants to get out of the experience or product? Be as specific as possible and make sure the outcomes are *behavioral* -- which means you will be able to clearly watch people demonstrate them after they consume your product or service.

Create a clear content map

Define a list of what you need to create for the project, which can include:

- ★ Audio
- ★ Written product materials
- ★ Video
- ★ Software applications
- ★ Graphic maps
- ★ Sales letters
- ★ Marketing copy
- ★ Emails

Decide on a process to research and gather information about your product or service

This can include:

- ★ Books to reference
- ★ Experts to interview
- ★ Websites and blogs to research

Choose tracking and information tools accessible to both partners.

We suggest:

- ★ Google docs
- ★ Basecamp
- ★ Dropbox

Assign roles and responsibilities

- ★ Who does which piece
- ★ Assign deadlines
- ★ Set meeting times for review

Tips for creating a smooth customer experience

The biggest risk for customer communication in a partnership is lack of clear roles in communicating, which can result in duplicate information, lack of information or crossed wires.

Communication tips

- ★ Discuss common “voice” of partnership
- ★ Map out all outgoing and incoming communication with customers
- ★ Decide which partner will be primary point of contact
- ★ Set up filters or a joint email to ensure both partners are copied on correspondence
- ★ Use technology as much as possible to automate communication and assure smooth delivery of consistent information
- ★ Check in frequently with your partner to resolve any problems or system glitches
- ★ Follow up with customer questions or issues immediately
- ★ When in doubt, share! It is better to share all your thoughts with your partner than to assume that they know what you are thinking (just ask any married person!)

Homework for Lesson Three

1. Define the information you will track for the partnership
2. Select your favorite tracking tools (Google Docs, Basecamp, Dropbox, etc.)
3. Decide how you will develop content. If possible, define roles and responsibilities in writing for content development
4. Create basic project management plan including milestones, due dates and check-in meetings

Bonus Article

Pam sits on the Young Entrepreneur Council and just contributed to an article on American Express Open along with the other mentors:

[11 Ways to Successfully Work With Strategic Partners](#)

Questions?

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