

Collaborate to succeed

Michelle Daniels discusses the best way to go about collaborating effectively with another firm's marketing team.

Collaborations between professional services firms are very popular. Accountants, lawyers, real estate specialists and HR consultants (to name but a few) often join forces to pool expertise on a given topic. In doing so they access a bigger audience and generate greater awareness of their specialism.

Over the years I've seen excellent collaborations around industry sector issues, market and legislative changes. Common outputs from these have been jointly-run events, publications (such as white papers, articles and guides), published research and even products or jointly packaged services.

Sometimes collaborations are initiated by a marketing team, however, it is more often a senior fee-earner who comes up with the idea from conversations with a specialist in another firm. The firms' marketing teams are then brought in to see how best to bring the idea to life.

Having observed and supported many firms' collaborative initiatives, some have been harmonious and a highly successful experience for all involved. However different expectations, poor planning and communication between the different teams have caused the end-results to be disappointing.

Be prepared for similar and different expectations

When it comes to a collaborative project, each firm will have similar and different



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goals and expectations. Common goals typically lie in the desire to access a broader audience, make fresh contacts and position a key message alongside a worthy business 'friend'. Different expectations often stem from:

- What specific messages they want to convey
- Introductions to specific people they want to gain during the initiative
- Their views on what form the initiative should take
- How they see their firm being involved in the creation of it.

It saves a lot of frustration if both firms are clear, right from the beginning, on what the similarities and differences are. It is absolutely fine for each firm to have slightly different goals and expectations for what they want to achieve, as long as the other firm understands, respects and helps to achieve these as well as their

own. A good way to gain clarity is to get together, face to face, right at the beginning, hence my next tip.

First things first – get a kick-off session in the diary

This session sets the scene and will establish the purpose and effectiveness of the collaboration going forward. Ensure the key people from both firms are there (if this isn't possible, make sure absent people are quickly brought up to speed). What you want to avoid is uneven representation across the two firms (particularly in decision-making and planning capabilities).

To help gain clarity and create an effective starting point for the project, try to build these agenda points into the discussion:

- Define the synergy between the two firms for this idea – it is likely that each doesn't know the other's full capabilities and expertise on this topic. This agenda point helps both to find out about each other's strengths and identify any potential overlap
- The ideal audience each wants to attract (and how)
- Desired goals and objectives each has for the collaboration
- Key messages each side wants to convey

From this, the two firms can establish mutual goals and start to decide what key messaging they can jointly cultivate to attract the audience they both want.



Creating a 'live' plan – the key ingredients

With the goals and positioning of the collaboration established, the next step for the two teams is to discuss and plan how they will implement the project effectively together. In your planning discussions, here are some ingredients which will greatly help.

1 Map out and divide responsibilities

– There's likely to be duplicate skills and so play to strengths, comfort zones, resources and interests so the project gets actioned well and efficiently. Now's not the time to be precious just for the sake of it.

2 Decide the split of positioning, effort and resources

– In some situations, a collaboration is driven more by one firm. Not all collaborations involve a 50:50 split of positioning (messaging), effort and resources. This is influenced by the nature of the project, the expertise involved, other commitments a team is facing and who's bringing the audience. Not having a 50:50 split is fine as long as both sides are clear and agree on the exact split, then allocate their time and resources accordingly.

3 Create a small decision-making team to progress the project efficiently

– A collaboration usually leads to a 'decision by committee' approach and simple activities in the plan can become protracted. Between the two firms, if you can create a small decision-making team who are focused on progressing the project, things won't stall unnecessarily. Ensure people in that combined team have the authorisation from their firms to sign off.

4 Agree the timetable and budget

– This should define the key deliverables

each side will undertake and by when. It should also flag when key decisions will be needed and review points the two teams will adhere to, in order to keep the project on-track. The budget should also be discussed openly. Again, play to strengths - for example one firm may have particular resources in place, which can be utilised to keep the cost of the initiative reasonable.

5 Agree the communications channels

– This is often an area which gets overlooked but is vital for the success of the initiative. Both teams should agree what communications channels they'll use to keep in touch and also the frequency of updates. Successful collaborations have seen email user groups set up, regular conference calls scheduled and additional meetings booked and honoured. Each helps to keep everyone up to speed and can flag when a particular part of the project is stumbling, so problem-solving can be initiated.

6 Agree how you'll present your joint branding and messaging

– This is another planning point to cover sooner rather than later, in order to avoid frustrations or delays. It is also influenced by how the collaboration is being presented and the division of effort (see point 2). Some collaborations have successfully married the two firms' branding/key messaging in the project's visuals and communications. Others have gone for a completely fresh branding unique to the project, with the two firms co-promoting it. Branding and messaging decisions typically take time and so the quicker you can all start to discuss this, the sooner a solution that all support can be found.

From these discussions, it helps the project's implementation if a short, practical plan is devised. This should be updated easily by both sides as activities are implemented.

Nuances for specific projects

When it comes to event collaborations, both sides need to be clear about the invite list and call to action details (in order to avoid duplication). To ensure the event is a positive experience for the audience, factor in time for the speakers to rehearse. This will help familiarise all about each other's content and enable slick hand-overs. Also plan how the event will be hosted on the day – eg. which firm's representatives will be where and how desired introductions will be initiated.

For collaborative publications such as white papers and articles, etc, decide on the distribution list and allocate responsibilities to avoid duplication. Plan who will take the lead in targeting particular journalists or other PR stakeholders and which member of the each firm's team will act as a spokesperson.

Irrespective of what form the initiative takes, don't forget to make sure each team internally communicates the initiative within their firm so everyone is aware and can support it. Finally, schedule a debrief when the project has completed. This should check the collaboration delivered what you all wanted. If it did, celebrate and discuss what other collaborations you could go on to do in future.

Summary

Collaborations between firms present a wonderful opportunity to reach a wider audience, offer more substantial expertise, add value to existing clients and contacts, and attract new ones. These initiatives, however, typically need time to plan and implement. While there are two teams involved and extra resources to draw from, decision-making, different systems and ways of working as well as protracted communications can slow things down. The key then is to be mindful of the obstacles and use the tips here to create a harmonious experience for all.



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