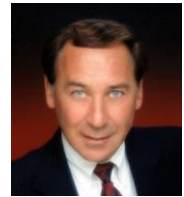




## *ROBERT PORTER LYNCH*

Founder --International Collaborative Leadership Institute



**VISION:** Robert's quest has been to find the answer to *four fundamental questions*, which are at the core of successful leadership interaction in teams, organizations, and alliances spanning international boundaries:

**First:** Can people of greatly different backgrounds and beliefs collaborate and create synergy?

**Second:** Is there a transcendent "design architecture" which brings out the best in humans?

**Third:** Can a leadership system be developed to replicate extraordinary success time after time?

**Fourth:** Can we create an effective System of Collaborative Excellence with "sticking power?"

*The answers to these compelling questions are a resounding "yes."*

**Thought Leadership:** Mr. Lynch is recognized for his groundbreaking work creating the *architecture of collaboration*. In the 1980s & '90s, Robert pioneered the field of Strategic Alliances with the first books that framed the design architecture and best practices for cross-boundary alignments. Robert is known among his professional colleagues as the "Father of Alliances."

Mr. Lynch has dedicated his career to developing of a fully integrated *collaboration system* (design principles, best practices, diagnostics). The system includes *collaborative leadership, collaborative culture, trust-building, collaborative innovation, and collaborative economics*. This system is fully scalable from *one-on-one relationships* to *teams* to *alliances* to large scale *organizational transformation*. Because it is a "system," the methodology greatly increases the chances of success in alliances, acquisitions, change management, and innovation.

**Author:** Mr. Lynch has written several highly popular books on strategic alliances along with numerous articles on collaboration, trust, leadership, and innovation. He is focusing now finishing a four-volume series of books based on breakthroughs derived from alliances: 1) *Rebuilding Trust in America*, 2) *Collaborative Excellence - The Four Alignments of Leadership*, 3) *Collaborative Capitalism - The Future Face of Economics*, and 4) *Collaborative Innovation -- Secrets of Synergy*

**Catalyst:** To trigger high performance results, Robert plays an activist's role in helping teams and organizations use collaborative strategies to have major performance breakthroughs. He uses the power of Action-Learning Workshops to engage in a rigorous set of activities to align, lead, govern, and generate new sources of value creation.

**Consulting & Coaching:** Mr. Lynch has helped senior executives for scores of companies throughout the globe in a wide variety industries ranging from aerospace, automotive, energy, construction, financial services, high tech, medical, petro-chemicals and pharmaceuticals. Robert is well known for working with top executives providing strategies, concepts, best practices, tools, and skills that produce quality results quickly.

**Business Leadership & Community Activities:** He has served on the board of directors of more than twenty not-for-profit civic organizations. He is the Founding Chairman of the [Association of Strategic Alliance Professionals](#) and the [International Collaborative Leadership Institute](#).

**Education:** Robert holds a Master's degree in Organizational Development and Human Behavior from Harvard University and a Bachelor's degree in International Relations from Brown University. He has been an adjunct faculty member of the Universities of Alberta, British Columbia, and San Diego; and has served as a faculty member of the American Management Association, and the Canadian Management Centre. During his career he has conducted leadership, trust, alliance, and innovation workshops for over 40,000 senior and emerging leaders.

**Military:** U.S. Navy, 1970-74, Lieutenant, Bronze Service Star, Combat Duty in Viet Nam.

**Personal:** Listed in Who's Who: Global Leaders. He is one of America's Top Thought Leaders in Trust in America. Robert often speaks before business groups, and has appeared on television and radio. Robert resides in Naples, Florida.

## Publications & Programs by Robert Porter Lynch

### Collaborative Leadership & Culture

- [\*\*How to Foster Champions\*\*](#) -- Chapter from Peter Drucker, *Leading Beyond the Walls* by Robert Porter Lynch (downloadable PDF file)
- [\*\*The Case for the Collaborative Imperative\*\*](#) for Alliance Professionals, including the *Economics of Expandables* by Robert Porter Lynch (full version) (downloadable PDF)
  - [\*\*Executive Summary\*\*](#) (short version)

#### -- Selected White Papers --

- [\*\*#1 Leadership as a System\*\*](#) -- The Four Essential Alignments by Robert Porter Lynch (downloadable PDF)
- [\*\*#2 The Case for Collaborative Leadership\*\*](#) -- 3 Leadership Types by Robert Porter Lynch (downloadable PDF)
- [\*\*#3 Qualities of Collaborative Leaders\*\*](#) -- Key Defining Characteristics by Robert Porter Lynch (downloadable PDF)
- [\*\*#4 How Collaborative Leaders use Culture as a Force Field\*\*](#) -- Why Humans do what they do; by Robert Porter Lynch (downloadable PDF)

### Collaborative Capitalism & the Economics of Trust

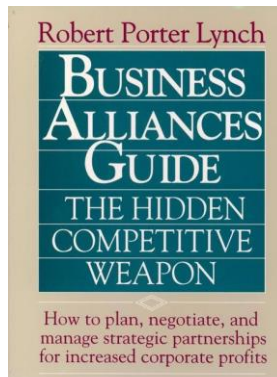
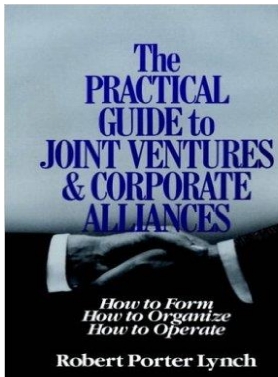
- [\*\*Three Faces of Capitalism\*\*](#) Why Collaborative Capitalism will prevail in the 21st Century by Robert Porter Lynch with Foreword by Paul Armington (downloadable PDF)
  - [\*\*Executive Summary\*\*](#)
- [\*\*Trust, the Economic Game Changer\*\*](#) How Trust Changes Economic Performance by Robert Porter Lynch -- Chapter from *TRUST, Inc* (downloadable PDF)
- [\*\*Trusted to Innovate\*\*](#) Breakthrough in Brain Science to Accelerate Collaborative Innovation by Paul R. Lawrence, Robert Porter Lynch, & Paul Zak (downloadable PDF)
- [\*\*Leadership and the Structure of Trust\*\*](#)® by Paul R. Lawrence & Robert Porter Lynch --feature article in *2011 European Business Review* (downloadable PDF)
- [\*\*Guidelines for a Steady Moral Compass\*\*](#) by Robert Porter Lynch (downloadable PDF)

### Collaborative Innovation

- [\*\*Collaborative Innovation, The Essential Foundation of Scientific Discovery\*\*](#) by Robert Porter Lynch, Chapter in Book on *Collaborative Technologies for Bio-Medical Research* (downloadable PDF)
- [\*\*Architecture of Collaborative Innovation -- Presentation of Key Elements\*\*](#) by Robert Porter Lynch (downloadable PDF file)
- [\*\*Synergy & Synchronicity\*\*](#) by Robert Porter Lynch (downloadable PDF)
- [\*\*How the Greeks created the World's First Age of Innovation\*\*](#) by Robert Porter Lynch & Ninon Prozonic (downloadable PDF)
- [\*\*The Champion of Innovation\*\*](#) by Robert Porter Lynch (downloadable PDF file)
- [\*\*Alliances as Engines of Innovation\*\*](#) by Robert Porter Lynch (downloadable PDF)
- [\*\*Four Critical Skills for Managing High Performance Innovation Alliances\*\*](#) by Robert Porter Lynch -- Chapter from Duysters, de Man, & Vasudevan, *The Allied Enterprise* (downloadable PDF)
- [\*\*Unlock the Creative Genius\*\*](#) (For Employee Owned Companies) by Martin Staubus and Robert Porter Lynch (downloadable PDF)
- [\*\*Innovation's Critical Weak Link\*\*](#) by Robert Porter Lynch (downloadable PDF)

## Publications & Programs by Robert Porter Lynch

### Strategic Alliances



These two books were the seminal work in collaborative *best practices across organizational boundaries* that launched the shift toward collaborative strategic relationships around the globe, and spawned the Association of Strategic Alliance Professionals.

- [\*\*Letter to Strategic Alliance Professionals after the 911 Attack\*\*](#)  
by Robert Porter Lynch, Chairman, Association of Strategic Alliance Professionals

### Managing Complexity & Risk Management

- [\*\*Future Path of Mega Projects—Managing Complexity\*\*](#) by Professor George Jergeas & Robert Porter Lynch (downloadable PDF)
- [\*\*Notes on the Law of Compounding Risk\*\*](#) *Understanding how to handle complex interfaces* by Robert Porter Lynch (downloadable PDF)

### Supply Chain Management & Outsourcing

- [\*\*Beyond Win-Win and the Myths of Win-Lose\*\*](#) -- *Creating Value in Negotiations for Supply Chain Managers* by Robert Porter Lynch (downloadable PDF)
- [\*\*Unleashing the Innovative Power of Suppliers\*\*](#) --by Robert Porter Lynch
- [\*\*Cooperation Brings Profitability\*\*](#) -- published in *Supply Management*, Dec 2007 by Robert Porter Lynch (downloadable PDF)
- [\*\*Creating Competitive Advantage within Supply Chain\*\*](#) -- by Robert Porter Lynch
- [\*\*Innovative Power of Value Networks\*\*](#)  
by Simon Croom and Robert Porter Lynch Published in *International Purchasing and Supply Research Association*, Bath, England, April , 2007

### SPECIAL SERIES: SUPPLY CHAIN OF THE FUTURE -- VALUE NETWORKS

(Advanced thinking about how to create great value in the Supply Chain Management)

These papers were co-written by Robert Porter Lynch and Steve Rogers, (author of *Supply Based Advantage*) in 2016 for Supply Chain Management Professionals:

- #1 -- [\*\*Supply Chain as a Strategic Asset\*\*](#)
- #2 -- [\*\*Getting a Seat at the Table\*\*](#)
- #3 -- [\*\*Strategic Value Chain Leadership & the 5 Shifts\*\*](#)
- #4 -- [\*\*Value Maximization\*\*](#)

### Entrepreneurs & Employee Ownership

- [\*\*Being an Entrepreneur -- The Real Truth about Success & Failure\*\*](#)  
by Robert Porter Lynch and Todd Welch (downloadable PDF)
- [\*\*Building a System of Trust\*\*](#) in Employee owned companies  
by Martin Staubus and Robert Porter Lynch (downloadable PDF)
- [\*\*Employee Ownership as an Engine of Innovation\*\*](#)  
Webinar Presentation by Robert Porter Lynch (downloadable PDF)

## Publications & Programs by Robert Porter Lynch

### Great Myths & Hoaxes

During the 19th & 20th Century, the writings of several influential authors were selectively interpreted to validate the less-than-ethical behavior of powerful people. The unfortunate result was the generation of a series of untrue “myths” (half lies, half truths, disguised as the truths). The myth becomes perpetuated, and engrained in our culture’s belief systems, ultimately providing erroneous guidance to people’s decisions and actions. Three hoaxes, that when we dug under the surface, were clearly far from the truth:

- [The Darwin Hoax](#) by Robert Porter Lynch and Paul R. Lawrence (downloadable PDF)
- [The Machiavelli Hoax](#) by Robert Porter Lynch (downloadable PDF)
- [The Adam Smith Hoax](#) by Robert Porter Lynch (downloadable PDF)

### Future Books (Currently in Draft Advanced Form)

Throughout history too many authors issued incomplete or marginal information because they were driven to publish too soon or without answering critical questions. I have refrained from publishing in the last 20 years because the understanding of collaborative systems was incomplete. Now the long task of a fully integrated understanding of the subject is sufficiently comprehensive to enable writing:

#### Trusted to Lead Series

- **Rebuilding Trust in America – Rushmore Strategy**
- **Collaborative Leadership Excellence – 4 Alignments**
- **Economics of Trust**
- **Collaborative Innovation – Source of Synergy**
- **CEO Handbook – Power of Trust on Performance**
- **Building a Team You Can Trust – for Managers**
- **Organizational Transformation & Turnarounds**

#### Future of Capitalism Series

- **Collaborative Capitalism**
- **Value Maximization and Value Creation**
- **Collaborative Entrepreneurship**
- **Economics of Trust – for CFOs**
- Opportunities for co-authorship will be offered when I can team with others who can add significant value and insights to the books.

### Chapters written by Robert Porter Lynch in other books

*Joint Ventures: A General Business Perspective*, in *Joint Ventures, Business Strategies for Accountants*, Wiley, 1998

*How to Foster Champions*, in *Leader of the Future Series, Leading Beyond the Walls, How High-Performance Organizations Collaborate for Shared Success*, Drucker Foundation, 1999

*Four Critical Skills for Managing High Performance Alliances*, in *The Allied Enterprise, Global Strategies for Corporate Collaboration*, Imperial College Press, 2001

*Implementing Value Network Management*, in *Supply Management*, 8<sup>th</sup> Ed. McGraw Hill, 2010

*Collaborative Innovation: The Essential Foundation of Scientific Discovery*, in *Collaborative Computational Technologies for Biomedical Research*, Wiley, 2011

*Trust, the Great Economic Game Changer*, in *TRUST, Inc. Strategies for Building Your Company’s Most Valuable Asset*, Next Decade, 2013

### Magazine Articles written by Robert Porter Lynch

Articles have appeared in the following publications:

- *American College of Physicians Executive Magazine*
- *Chief Executive Magazine*
- *Employee Ownership*
- *European Business Review*
- *Export Today*
- *High Tech Connections*
- *Inside Supply Management*
- *International Purchasing & Supply Association*
- *Journal of Business Strategy*
- *Management Review*
- *Purchasing Manager Magazine*
- *Real Estate Professionals Magazine*
- *Strategic Alliance Professionals Magazine*
- *World Trade*

## COMMENTS by OTHERS

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### SELECTED CLIENT LIST

#### CORPORATIONS

Accenture  
Adobe  
Astra-Merck  
AT&T  
Bell Canada  
BellSouth  
Cisco Systems  
Dow Chemical  
DuPont  
EDS  
Eli Lilly  
Flextronics  
General Electric  
Glaxo Smith Kline  
Hewlett Packard  
Honeywell  
IBM  
Intuit  
Lockheed-Martin  
Lucent  
Media One  
Mobil  
Pfizer  
Price Waterhouse Coopers  
Procter & Gamble  
Prudential  
Sprint  
Telus  
USAA  
VeriSign  
Warner Lambert  
Wells Fargo  
Xerox

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#### GOVERNMENTS

United States  
Departments of Defense  
& Commerce  
Canada  
Ministries of Agriculture, Trade  
Provinces of Alberta, Nova Scotia  
British Columbia, Manitoba,  
Northwest Territories

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#### UNIVERSITIES

University of San Diego  
University of Alberta  
University of British Columbia

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#### ASSOCIATIONS

American Management Association  
Canadian Management Center  
Numerous Trade Associations  
Association of Strategic Alliance Professionals

#### **Entrepreneurship:**

We take a very entrepreneurial perspective when addressing problems and opportunities.

During his career, Robert also founded (or co-founded) seven successful companies:

1976: New England Neighborhood Revitalization Center

1980: Ocean State Business Development Authority

1984: Richmond Square Business & Technology Center

1986: The Warren Consulting Company

1987: Nathaniel Porter Inn

1998: Association of Strategic Alliance Professionals

2016: International Collaborative Leadership Institute

#### **Consulting:**

For over 30 years Robert provided clients with solutions that work when two or more organizations are linked together in an alliance, joint venture, collaborative network, out-sourcing arrangement, or supply chain.

The Warren Company's compelling strategic and operational architectures in collaborative innovation are recognized as the standard of excellence by business, government and non-profit organizations throughout the world.

Our breakthrough work in Collaborative Innovation Architecture and Strategic Alliance Architecture has resulted in enormous shifts in success rates, value creation, and competitive advantage for our clients.

#### **Our Team:**

We are a network of highly experienced and successful professionals; each with years of accomplishments in operational fields. All of our team members are carefully selected for each project to ensure you get the most advanced approaches with the most competent people.

#### **How we work with Your Organization:**

Unlike consultants, we are "Architects and Capability Builders" who deliver a tested and effective *strategic system* and *process methodology* that harnesses the innovative power of differentials in thinking across internal and external boundaries.

Our primary objective is to transfer our skills and expertise to your organization, thus building *your* internal capabilities.

### What Others Have Said About Robert Porter Lynch's work:

#### From Trust Authorities

- Robert Porter Lynch has discovered the missing code on Trust. Despite my initial skepticism ("Oh no, not trust again!) his new approach to trust is exceptional. There's an important difference between subject matter experts and real groundbreaking thinkers; he's definitely the latter. If there were one resource I'd turn to on matters of Trust, Mr. Lynch would be that thinker. -- Paul G. Stoltz, Ph.D. Author, *The Adversity Advantage* and *Adversity Quotient*, PEAK Learning, Inc.
- Robert Porter Lynch may be one of the best trust thinkers you haven't heard of. – Charles H. Green, Author: *The Trusted Advisor*
- Robert Porter Lynch is my "Trust Advisor" – Michael Kerrigan, Author: *Characters with Character*
- Robert Porter Lynch is one of the Top 100 Thought Leaders – Barbara Kimmel, *Trust Across America*, *Trust Around the World*.

#### From Senior Executives

- Thank you for your passion and wisdom by faithfully speaking the truth to business people! These messages are critical at such a time as this!! -- Michael Allen, CEO, Ventura Mfg.
- If I'd had this earlier in my career, it would have saved me millions of dollars – Malcolm De Leo, Vice President, Daymon Worldwide
- Not only is our team using this every day; I took it home and discussed with my wife and kids. Our lives are being shifted by the approach. – Director of Non-Profit Organization
- The bad news is: I now see why our organization is so dysfunctional. The good news is: I now know exactly what I need to do to fix it! – Senior Vice President

- I got four big take-aways from this:
  - First, I know understand why trust has broken down so many times, and the role I inadvertently played.
  - Second, I feel empowered to take the right corrective action.
  - Third, I realize I can reclaim my birthright to trust – and that's so inspiring.
  - And last, I won't be naive and trust like a blind fool. – Senior Account Manager, HP
- "Our team can't stop talking about it -- it's having a profound effect" – Senior Director

#### From Universities

- The most compelling and insightful framework about trust yet. Robert Porter Lynch's "Architecture of Trust" is unexcelled in its thoroughness, depth of understanding, scientific structure, and strategic value. Lynch is an enlightened realist whose insights have enormous potential not only to empower leaders to bring forth the very best in others, but also to serve as a foundation for renewing our belief in business itself. This work transcends the superficial treatment we've given the subject of trust for too many years. – Paul Lawrence, Professor Emeritus, Organization Behavior, Harvard Business School
- First breakthrough on trust I've seen in years. 4-Drives Model is far better than Maslow's Hierarchy. -- David Burt, Chairman Emeritus, SCMI, USD Business School

#### From Research & Development

- Robert Porter Lynch's work is the "gold standard." His work has inspired many of us in Dow Chemical to see our world in a whole new light. -- Curtis Volkman, Director, Corporate Venturing, Dow Chemical

## COMMENTS by OTHERS

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### From Government

- This will make a major difference in the way we think and act – Senior Dir., Government
- I'm printing the Trust Ladder in super-size and posting it behind my desk. Anyone who comes in and acts "below the belt" must turn around and leave. – High Ranking Federal Official
- Robert definitely knows his stuff. He is highly informed, and highly involved in real life practice of the material. He's not just an academic studying it; he is an applier of it. – Assistant Deputy Minister, Canadian Provincial Government
- Robert has significant depth and breadth of scope and understanding of the material covered, what vast amount of knowledge - WOW! He has energy and passion. He was forthright with opinions. He had a genuine desire to help. – Assistant Deputy Minister, Canadian Provincial Government

### From Strategic Alliance Professionals

- Fabulous, this gave me insight into how I will withstand the onslaught of distrustful disruptions in my life – Senior Account Mgr
- The Trust Workshop was truly a life-changing epiphany for me. It was awesome. You made trust so easy to embrace. Thank you many times over! – Senior Account Manager
- An eye-opener that has application beyond alliances. – Susan Wright, USAA Insurance
- We can now raise the trust issue without the fear that someone might go ballistic. – Alliance Manager
- Too often people complicate things and make it difficult to talk about it. You have simplified this issue without dumbing it down. – Christine, Nationwide Insurance
- Exhilarating and Inspiring, this is the next breakthrough in alliances and human relationships. The Architecture of Trust in a Grand Unifying Principle that makes sense of lots of seemingly disparate phenomenon

and ideas. It lets us break through the fog and make see some powerful realities. – Tom Halle, Hitachi

- This was terrific – you really hit a home run on this – Alliance Mg, Walt Disney Corp.
- Robert Porter Lynch is the grandfather of alliance best practices. He singlehandedly started the Association of Strategic Alliance Professionals and continues to share alliance best practices with many hundreds of alliance executives to this day. He helped me personally get started in this area and I owe him a huge debt of gratitude. If you are ever lucky enough to be invited to one of his seminars then grab it! It will be the best alliance time you have ever spent. Thanks a million for all the help and support you gave me when I started out and you continue to offer. -- Mike Nevin, Founder, Alliance Best Practices, United Kingdom

### From Innovators & IT

- We all would have enjoyed a full week of absorbing information from your vault of knowledge and experience. I've seen my share of presenters over the years who've succeeded in delivering content, making a difference, and providing a learned point of view of the subject matter. However, I've never felt more compelled by one person's passion for the content's scope, and their "call-to-arms" approach to how we carry ourselves as humans in general. Thanks so much for the inspiration. -- John County, Business Manager, Daymon Worldwide
- Thank you for helping find a powerful new way to make a difference – Kevin Gangel, Branch Manager, Sapphire Technologies
- I have already begun to see the effects through our team's increased camaraderie, openness, and collaboration. The great thing is that we are seeing that the lessons are being applied into action already. Several team members commented on how this workshop was "better than any class" and "ranked at the top compared to past team events". We are making a POWERFUL

## COMMENTS by OTHERS

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difference!! Our team will never be the same after this experience! -- it's having a profound effect. My whole team is being reenergized -- Cassie Kutzli, Business Innovation Manager, Daymon Worldwide

- Truly inspirational. Thank you so much for providing such an original and thought-provoking approach to collaboration and innovation. -- Thomas Harding, PhD, PEng Technology Senior Advisor, Nexen Energy

### From Mediators

- Thank you from the bottom of my heart – you opened my eyes to something we've been missing in our work – Gail Hope, Conflict Management Mediator
- You've given us the missing things I've been seeking for all my life. You've linked together in a masterful way what seemed so disparate. This whole day was moving and inspiring – I feel expanded and enriched. I was so excited about everything when I returned home I have not stop thinking about this. Thank you from the bottom of my heart. – Lynda Telford – Mediator, Negotiator
- We are always looking for something new that will help our work – there's been a hole for me that I couldn't put my finger on. This material is rich and empowering to help us face the work and are so passionate about – Wendie Hassen, Conflict Management Mediator
- Just Awesome! This will change my practice – Maureen Curran, Energy Resources Conservation Board
- Fabulous! This really opened my eyes to a whole new set of possibilities – Cynthia McCarthy, Mediator
- I've been using this in the field every day. It really works – Sharon Seiler, Mediator
- Thanks for your life-changing presentation!!!! I learned so much. God Bless -- Duncan McGregor, Alberta Arbitration & Mediation Society

- Truly a moving experience for our members. It is clearly the next wave of value past win-win thinking. – Paula Drouin, Exec. Director, Alberta Arbitration & Mediation Society

- I am forever grateful for giving me a better way.... I've already had a chance to use it with a couple of my mediation clients and found it very helpful. -- Sylvia Thomas, Family Mediator

### From Human Resources

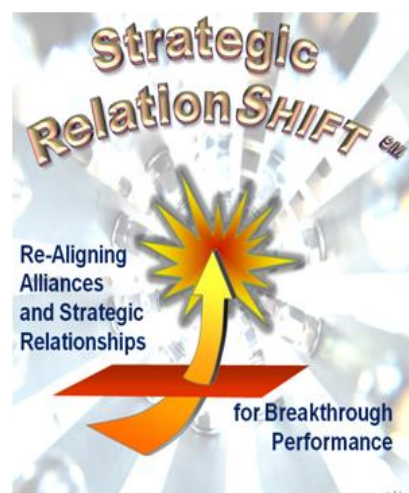
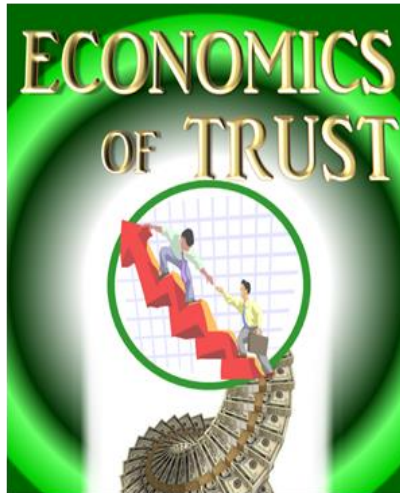
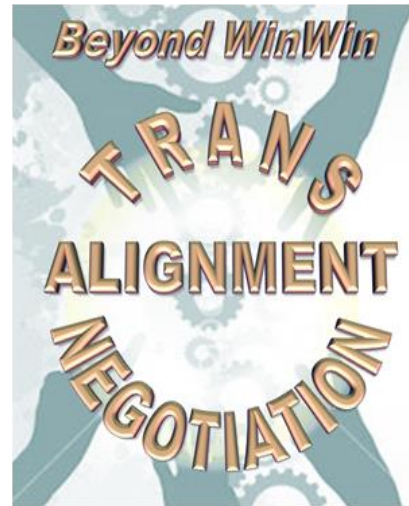
- Most entertaining and engaging presentation. What an amazing amount of effort went into the research and your ability to relate a difficult topic to a wide audience. We will be using the Ladder of Trust as part of our Core Values of 'trust, respect, and communication.' -- Donna Smith, Manager Learning & Development, Clarke Builders
- You've re-energized me! I am very passionate about people and their potential for greater things and your work has given me some better tools to push that positive message forward. Thank you for your endless quest for knowledge and more importantly for sharing it with the world - YOU ARE MAKING A DIFFERENCE, please keep spreading your good work! -- Susan Harrison, Director, Service Delivery, Ministry of Social Development and Social Innovation, Gov't. of British Columbia
- As professionals we read so many books, but few really have content which stays embedded in our thoughts. Some of the frameworks which you have produced form the basis of how I operate ... the robust and structured frameworks ... have really assisted me in my career. – Sesh Sukhdeo Transformational Leadership



## WORKSHOPS

### Executive Capability Building Programs (1-2 days)

These programs have been attended by over 40,000 senior executives globally on several continents, principally in North America (U.S. & Canada). They are tested, proven, and highly effective. Each is designed to impart strategies and best practices, and give participants the opportunity to apply the learnings to real-life situations in their work environment. (below is just a sample of programs available – either standard or customized to your needs)



### Client Cases – Innovation & Alliances

During the last decades, our team has been intimately involved in launching unique alliance projects across the globe. The following case studies represent alliances, large and small, that have produced remarkable results using our Best Practices.

We have many, many more examples, but the ones included here are quite representative of what has been accomplished. We look forward to adding many more to this list.

#### Client Cases: (Innovation Projects using Best Practices Implementation by our Team)

- Case #1: Innovation between Bio-Tech Firms and a Global Pharmaceutical company
- Case #2: Value Chain Reengineering of Insurance Industry firm to enable new Innovations
- Case #3: Reorientation of Global Procurement to establish Innovation Flow from Suppliers
- Case #4: Alliance between two Global High Tech companies to focus on new joint innovations
- Case #5: Transformation of Vendor Relationship in Major IT Global Outsourcing
- Case #6: Outsourcing of Critical Functions by Large Interstate Bank
- Case #7: Large International Quick Service Restaurant Chain
- Case #8: Global Pharmaceutical Outsourcing Dilemma
- Case #9: Large Systems Integrator
- Case #10: Joint Venture between Two Leading Arch-Competitors in Financial Services Sector
- Case #11: Strategic R&D Suppliers to Large Chemical Company
- Case #12: Joint Venture to Build Sports Centers in New York City

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### Case #1

#### Innovation between Bio-Tech Firms and Global Pharmaceutical Company

##### Problem

Innovation is the critical element of success in the Pharmaceutical Industry.

A major pharmaceutical firm was faced with a dismal prospect for the future: its internal R&D did not have a breakthrough drug in the pipeline, its major drug patent was soon to expire, and, to make matters worse, the company's reputation with the all-important bio-tech firms was less than stellar.

When new innovation was ready for licensing to a major pharmaceutical company, the bio-tech firms went elsewhere.

##### Solution

First gaining senior executive endorsement, the company made full use our extensive proprietary best practice architectures.

They then drove the collaborative capability deep into the organizational structure and used these approaches to revitalize existing innovation relationships

Then, using our proprietary architectures, the company forged new relationships with outside innovators around the globe.

##### Results

Within a year, results were being seen. Transactional thinking had been replaced with new win-win approaches. Arrangements that had traditionally taken many months to put in place were now taking just weeks. Innovation relationships were being rebuilt.

Within four years, the company was proud to announce it had an abundance of new innovation.

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**Case #2****Value Chain Reengineering of Insurance Industry firm to enable New Innovation****Problem**

The Property & Casualty segment of the Insurance Industry was severely broken. For fifteen years,

- ◆ 40% of the Commercial Market customer base had opted out of traditional P&C insurance in favor of self insurance, led primarily by large corporations. On the other hand, small businesses, lacking the financial resources and competencies for self insurance, were faced with ever-increasing premiums, and very poor service.
- ◆ 20% Turnover Insurance Customer Turnover/Churn Rate, resulting in:
  - Hi Cost of Sales and Service, and Low Profits for Insurance Agencies
  - High Costs to Insurance Carriers, who, in turn, began to attack Agency Commissions
- ◆ All Told, the Large Insurance Carrier Industry had not made a profit on the underwriting side of the business since 1979, suffering a 2% loss during the early 1990's.

Every part of the value chain was struggling to carve up an ever-diminishing pie, no one was satisfied. The P & C system was a mess, and required more than just "fine tuning."

**Solution**

While many companies had tried new technology to create efficiencies, we saw the problem not needing technology innovation, but primarily process innovation.

Using our proprietary architectures, two strategies formed the foundation of shift:

- Form collaborative alliances with and across the currently broken elements of the value chain, and
- Reengineer the way value is created and delivered in the value chain.

The aim was to encourage Clients, Agencies/Agents, and Carriers to work together to:

- provide better continuity, and specialized products
- achieve superior underwriting results, and attain better loss ratios,
- create satisfied customers

By sharing risks and rewards across the entire value chain, a "triple win" could be achieved.

By reengineering value chain, improvements could be made in areas such as elimination of non-value added work, better cycle time, innovation, and integration of functions.

**Results**

Using the theme of the "Power of Shared Knowledge," innovation has blossomed at every point in the value chain. The client has been able to produce a value-laden strategy, provide leadership, design a functional organization, encourage collaborative alliance processes, and produce very positive economic results. The reengineering of the value chain has been a success.

- ◆ Premiums are down,
- ◆ Underwriting is now profitable,
- ◆ A deep trust has been built among entities that were formerly adversarial competitors.

While many of the networked suppliers and customers remain competitors, they also work together productively on the basis that "all ships rise on a rising tide."

Since its inception ten years ago, the client has been expanding beyond its mid-Atlantic origins, with operations now in the north-east, mid-west, and west.

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**Case #3****Large Consumer Products Company****Problem**

While Innovation was an important competitive advantage for this global company, innovation had solely been sourced from its internal R&D organization. Without new innovation, the company would be faced with a massive amount of erosion of market share.

**Solution**

Using our Strategic Outsourcing frameworks, and Engines of Innovation processes, we were able to assist this company in reframing its entire supply chain, isolating those suppliers with the greatest potential for creating external innovation.

Working with both the internal procurement teams, R&D, internal cross functional teams, and the supplier, we helped create both internal and external alliances on a global platform.

**Results**

New innovation streams have had a major impact on revitalizing old product lines and creating new products, more efficient processes, and greater leverage of internal innovation with external resources.

These innovations have had a significant impact on both Revenues and Profits.

Competitors are reeling, but don't know how to duplicate the advantage.

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**Case #4****Large Interstate Bank Outsourcing Case****Problem**

A Top-10 ranked bank was buried in paper and microfilm from the archiving of millions upon millions of checks, which must be kept for tax purposes for seven years.

The changeover from film to digital technology would be extremely costly, and the bank did not have a core competency in digital imaging management.

**Solution**

We assisted the bank's key decision makers in analyzing the costs and risks associated with investing in the new technology and how the system would be managed. The analysis proved an outsourcing arrangement would be the best solution.

We then assisted the bank in assessing the different outsourcing partners and facilitated the negotiations to ensure a real win-win for both parties that assured the bank of the lowest cost, while keeping up with technology upgrades.

**Results**

The difficult process of transferring of employees from the bank to the outsourcing was handled without disruption, and the archiving process was seamless and well integrated into the bank's functioning. Costs to the bank were reduced substantially, while the new innovations increased speed of retrieval and customer satisfaction.

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**Case #5****Global Outsourcing of IT****Problem**

Large Consumer Products Company with over 100,000 employees around the world outsourced its Information Technology Systems to a well-known IT outsourcer. It was one of the biggest outsourcing contracts ever signed. The ten year contract, worth billions of dollars, was over a foot high. Over 2,000 employees were transferred to the IT company.

After one year, signs of stress were showing. No one working on the outsourcing management team had read (or wanted to read) the contract, for it was inflexible and already out of date. The customer was not getting the results they needed as business conditions changed and new acquisitions were about to be made, which would further stress the relationship. And the outsourcer's long-term prospects for profitability on the contract were getting bleaker.

**Solution**

Using our Engines of Innovation Best Practices, we first designed a strategy with both companies to transform their relationship from a tactical, transactional, contract-based arrangement to a strategic, innovative, principles-based alliance.

A new, innovation-based, win-win business model was designed to create a powerful engine to drive lower costs while simultaneously enhancing strategic flexibility as global business conditions warranted. Both companies made a powerful commitment to each other's need to innovate to win.

Knowing that changing the contract would take months, if not years, both companies instead designed a set of Operating Principles that would keep the alliance regenerative through a continuous stream of new innovations.

**Results**

Both companies cite significantly higher satisfaction with the new Innovation Alliance. Shortly after the transformation, the Consumer Products Company made a major global acquisition, and, using the new Operating Principles, has begun a seamless integration of the acquired IT systems. The IT provider considers their arrangement a "best in class arrangement."

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**Case #6****Solution Delivery Alliance between Large Network Provider & Large System Integrator****Problem**

For five years a large network hardware company had suffered from lack of success in its solution delivery process with its partner, a large systems integrator. Performance was poor, and innovation was minimal

**Solution**

Applying our diagnostic and integrative architecture, we assisted the two companies in realigning the strategic, chemistry, and operational fits of the alliance, catalyzing a new organizational re-launch, and reenergizing a new leadership team.

By focusing on new joint innovations, the alliance was able to develop a distinctive differentiation in the marketplace, enabling it to capture new sales.

**Results**

The new approach has begun generating new revenues and spawned the creation of a new market service offering potentially worth hundreds of millions of dollars.

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**Case #7****Large International Quick Service Restaurant Chain****Problem**

Quick Service Food Retailer had multiple manufacturing plants throughout North America.

A benchmarking analysis showed that none of the plants were competitive compared to the best-in-class manufacturer.

A strategic review indicated that manufacturing was not a necessary core competence.

**Solution**

We assisted in negotiating a strategic outsourcing alliance with a major competitor who had world-class competencies in manufacturing.

Key issues were negotiated, including a long-term global strategy, logistics, supply management, coordination of investments, and integration of information services.

**Results**

The rollout program proceeded rapidly.

After 12 months, the program was nearly six months ahead of schedule.

Manufacturing costs were reduced by almost 15%, logistics were substantially improved, and ROA increased dramatically by closing some plants, and shifting ownership of some older manufacturing plants to the strategic sourcing partner, who proceeded with major upgrades to the facilities.

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**Case #8****Global Pharmaceutical Outsourcing Dilemma****Problem**

Global Pharmaceutical Company had extraordinary transportation costs. Two arch-rival travel companies, one in Europe and one in America managed the travel across the world. Neither travel company had incentives to lower costs or creates innovative solutions to the ever-spiraling costs. Each was "best in class" in its respective market.

**Solution**

Using our best practice architectures, we forged a cooperative relationship between the rival suppliers, building a common vision, purpose, and integrative linkages to serve the common business customer.

Trust building and communications protocols were established to enable a common user interface and common systems for corporate travelers across the Atlantic.

**Results**

The rivals collaborated to create scores of innovations, which reduced costs to the Pharmaceutical company by nearly 25%, made travel easier for global travelers, while retaining the solution provider's profit levels.

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**Case #9****Large Systems Integrator****Problem**

A large global system's integrator's Business Process Outsourcing (BPO) practice, while profitable, suffered from difficulties ranging from:

- How to present the offer to business customers,
- How to develop Service Level Agreements (SLA),
- How to negotiate, and
- How to form a positive long-term relationship with the customer that consistently produced innovative results without diminishing profitability

**Solution**

First, we embarked on a landmark global best practices study of BPO, leveraging on our foundation of alliance best practices.

Then we assisted core leadership teams in leading vertical markets to imbed these practices into new and existing BPO agreements.

**Results**

Customer satisfaction rates increased, SLAs were renegotiated to become more strategic and flexible, and new contracts were won over the competition. The Best Practices then became imbedded in the organizational system.

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**Case #10****Joint Venture between Two Leading Arch-Competitors in Financial Services Sector****Problem**

Two fierce competitors needed to join forces in a joint venture to produce a common product/service offering to the global financial services industry.

The cultures and operations were diametrically opposed; outside analysts predicted its early demise.

**Solution**

Using our proprietary integration architectures, we provided the processes and practices to create a truly unified organization to produce highly innovative products and services.

By focusing on just three critical metrics:

- ◆ Customer Retention,
- ◆ Profitability, and
- ◆ Teamwork,

the JV was launched quickly, enabling the software development to proceed with a joint next generation product.

**Results**

One year after the launch, the JV had remarkable results:

- Was the market leader,
- Retained 100% of its customer base
- Retained 97% of its key leadership,
- Attained double-digit profitability despite the recession,
- Continued to gain market share.

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## Case #11

### Strategic R&D Suppliers to Large International Chemical Company

#### Problem

After years of cut-throat bargaining with R&D providers, the company had lost market share, was consistently late to market, and supplier quality had diminished.

Suppliers had dwindled in number over the last decade by win-lose negotiations and tactical transactional processes by every company in this industry sector.

#### Solution

First, the company shifted from a transactional procurement perspective to a strategic relationship.

Then, using our best practice frameworks, key solution provider contracts were renegotiated, with a focus on creating strategic competitive advantage for the company, and win-win value creation for both parties.

Finally, innovation became a core element to the ongoing success of the solution providers.

#### Results

Total Cost of Ownership dropped dramatically, solution providers dramatically improved time-to-market and implemented new process and technology innovations.

The corporation's market share began to grow, company profitability improved by tens of millions of dollars directly attributed to the program, and the solution provider's financial footings stabilized to enable critical strategic investments.

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## Case #12

### Joint Venture to Build Sports Centers in New York City

#### Problem

New York City had decided to upgrade its sports centers. In the offing were Citi Field, home of the New York Mets Baseball team and the Barclay's Center in Brooklyn, home of the New York Nets basketball team and Long Islanders Hockey team. Together, these would involve nearly \$2 billion in new construction.

Bovis Lend-Lease & Construction's NYC office wished to bid on two major sports centers. They had years of experience in New York City, including permitting, approval, union relationships, and construction know-how. However, their expertise was in commercial office construction, not sports arenas, which is a very different field of construction. Bovis, should it bid on the projects, would have been severely disadvantaged.

Hunt Construction of Indianapolis, Indiana also wanted to bid on the projects. With a distinguished track-record in building airports, stadiums, and arenas, Hunt had the construction expertise, but not the relationships with city officials nor union contracting in the New York City environment, a severe liability in a city with a very distinct culture different from Indiana.

#### Solution

The strategic strengths and weaknesses of both Bovis and Hunt theoretically made a perfect fit. However, a great, strategic fit could be a terrible cultural and operational fit as the two companies were organized very differently, came from very different operational backgrounds, and had no experience working together. Using our Collaborative Excellence frameworks, integration architecture, and best practice methodology, we were able to orchestrate a very successful strategic alliance.

#### Results

The Bovis-Hunt alliance won the bids on both sports projects and completed construction without major difficulties, delivering the complex projects on time with few budget over-runs.

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