



▶ Sample Business Blueprint of WE Collaboration Document

Context for the creation of this sample Blueprint of WE: (This context would not be written in the actual collaboration document, but is meant to give you, the reader, better insight into why specific elements were shared.)

Anne is the owner of a medium sized business. A key portion of her business was faltering and she needed to make some changes. There were communication problems and delivery mistakes up and down the supply chain. Anne was unsure if she had expanded too quickly, or if the market opportunity was too disperse to manage effectively. She considered cutting back on this portion of the business, but that would have meant laying off some people who had been with the business since the beginning. Anne needed a solution.

Brian is a custom software designer and IT consultant. He specializes in creating integrated communication and distribution software for disperse and expanding businesses. Most of his solutions are on the cutting edge of technology and business philosophy ideas and are seen by some to be risky and over the edge. He prides himself in connecting on the people side and this helps companies to adopt the new and sometimes radical software systems he creates.

When Anne and Brian met they hit it off well as like-minded business people who liked challenge and a certain amount of risk. Anne believed Brian's solution could be the answer to her problems. The project before them needed a certain degree of flexibility and an integrated approach to succeed. After considerable discussions about process and delivery; including expected schedules and responsibilities which both parties would need to meet, Anne and Brian agreed that the project at hand, and their business relationship into the future, required a strong foundation built on trust and respect. On Brian's suggestion they decided to create a Blueprint of WE. Previously Brian believed that only those projects appearing most chaotic would require a collaboration document. Yet after he was burned by a client relationship that began more harmonious than most, he now insists on a Blueprint of WE with all his clients. It has saved him a lot of agony to know he can focus on the work at hand rather than putting so much energy into needless worry over what the client may or may not be thinking. The Blueprint of WE allows him to ask more openly, and know the client has committed to doing the same.

Our Blueprint of WE: Between Business Associates Anne and Brain

We both agree that staying in a good place with one another is more important than keeping our business relationship status quo. Creating this Document will change the nature of the relationship by building a foundation of knowledge and understanding that engages our creativity and intelligence at a far deeper level. In the event that we encounter a rough spot along the way, this information and list of questions, written by us, is a way of ensuring we'll have the difficult conversations that are sometimes needed, and come through them knowing we only have the best intentions for ourselves, each other and the business at hand. This is a living, breathing Document that will continually evolve as our work evolves and as we grow and change.



1. The Story of Us

Anne: We came upon the decision to work together because our thoughts on this project were very much in alignment. I admire the way you're so passionate on the topic when you talk to the group and your knowledge of our specific software package is incredibly valued. You bring a lot of energy and life to the project and I respect the way you do business. Your honesty is impeccable, you value other people's time and I trust that you want what's best for the company as well as yourself.

Brian: I'm grateful for the chance to work on a project that really aligns with my skills. I appreciate the fact that you've put your trust in me and are willing to give so much of your time to assist me. Your ability to run the numbers yet see the bigger picture is critical. The entire team greatly respects your leadership style because you're willing to let us take risks. I'm glad you're a risk taker, because I know this project might be seen as radical in some arenas. I like your sense of humor in tough times and the fact that you can say so much in your silence at times.



2. Interaction Styles

Anne: I am at once a very hands-on person with details, but also very hands-off when it comes to letting my people do their best work. I'm confident in letting go of control, because I've done my homework ahead of time. If I can see you're prepared, I can let go of control, but don't come to me unprepared.

Brian: I tend to work at a very fast pace and am very frenetic when it comes to creating the software solutions. When working with others I am gregarious and enjoy a relaxed, casual atmosphere.



2. Warning Signs

Anne: If I go into my office and shut the door, look out. I only shut my door when I am unsatisfied with the situation. When I come out, I need rational, straight answers, not opinions or roses. I also tend to get irritable when I skip meals, so it wouldn't be a bad idea to have some food on hand during crunch time.

Brian: When things get stressful, I often get more excited and impatient when others don't pick up on what I'm trying to tell them. At that point I need someone to remind me that I'm not helping the situation by adding more stress and I may need a five-minute breather.



3. Expectations

Project Agreements:

Description: Brian and his organization will deliver an IT solution for Anne's company's distribution system, including deployment, testing, implementation, and on-going support for 2 years - renewable annually.

Timing: Deployment will begin August 1, with a goal of full implementation by January 31.

Cost: \$400K to Brian's organization; \$100K June 15, \$75K September 15 and December 15; \$100K upon full implementation. Remainder paid in 3 installments beginning at year 2.

Anne's Expectations:

- *Relationship definition:* Collaboration based on respect, meaning each person gives respect to each person involved, including oneself. Timely communication = weekly progress meetings and daily updates. This will be contract work - Brian is not an employee, he is an equal.
- I expect to be available every step of the way. This is a crucial project for my company.
- I expect the work to be done efficiently. That being said, I understand that as we stretch the boundaries, things may take longer than planned. It's important for our company's cash flow to get the new system in place and working well as soon as possible.
- I value teamwork, a no-nonsense approach to the business at hand, recognition where it is due, and fun.

Brian's Expectations:

- *Relationship definition:* Work together on a project basis. My organization will deliver and implement an IT solution to the distribution problem. Anne has the knowledge of her business, I have the knowledge of process and flow. Together we create a team to deliver what is needed.
- I expect we will push the boundaries of what an IT system can provide and push ourselves in the process.
- I expect to enjoy my work while providing a valuable service.
- *Values:* determination, spontaneity, respect, clarity, creativity.



4. Questions to Return to Peace

1. How comfortable are each of us having this conversation right now? Is it the best time?
2. What are the pluses that we have each brought to the project so far?
3. Peel away the layers of fear and ask yourself why there's tension or why we're feeling disconnected.
4. Are each of us getting what we need?
5. Has the work we planned on doing together panned out as expected so far?
6. Is it possible this could be occurring because of some sort of a power struggle. If it is, who is it between and how is it impacting us?
7. What do I appreciate most about you? What gifts have we given each other?
8. What do I need to forgive myself and/or you for?
9. Now that we have answered these questions, what are you still afraid of?
10. Thank each other.



5. Short and Long-Term Agreements

If at any given moment one of us feels there's something out of place, we commit to coming together within four hours to go over the above Questions. We also agree that if by chance something unimaginable happens and we can't manage to come together to go over the questions to return to a state of peace, **we commit that we will not do anything to outright harm, speak negatively to others about, or create more pain for the other. We also agree on a long range timeframe of five years to get back together to find peace if we can't seem to make it happen before then.**