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## **Business Case: Building Winning Partnerships Through Collaborative Business Planning**

A global networking equipment provider (the company) and a Latin American technology solutions provider (the partner) recently won a \$10 million deal from one of the region's largest corporations, and now find themselves in "the pole position" for more such business. How? By pushing their collaboration to a new level through a joint business planning strategy process that they learned at Thunderbird.

### **Creating a real partnership**

The company and its partners had always worked together before, but had never truly teamed up to jointly understand the market and pursue clients. So, the first step for the company was to initiate a strategy of real collaboration with its partner. In an effort to build essential trust, the country managers of both companies formed an integrative team and then sent the team members off to an activities-based business planning program at Thunderbird.

### **Learning to Build Through Templates**

The heart of the Thunderbird program was for the teams to complete a joint business and engagement plan that could be promptly implemented in the field. During the one-week program, the participants alternated between learning several business planning frameworks, including macro- and micro-environmental analyses, customer analysis, product analysis, and a solutions benefit analysis, and breaking out into workshops to implement each successive step.

In order to facilitate these template-based learning activities, consultants with the Thunderbird Learning Consulting Network (TLCN) provided the teams with information packets covering the target country's political and economical situation, as well as specific information on selected vertical markets and customers, including such factors as major customers and key sales data. Using these packets and their own knowledge of the markets and customers, participants were able to fill in each business planning template.

### **Next Steps—Gaining Additional Insight from the Client**

Armed with a semi complete business plan (some of the client information was still missing) the team arranged for a formal meeting with a key end customer. In order to show their commitment to the new level of collaboration, both the company and its partner/provider sent their country managers and an eight-member strong cross functional team consisting of both sales and technical staff. One of TLCN's consultants who had been involved in creating the initial information packets and in participating in the workshops was also included. The goal of the meeting with the client was to fully comprehend the workings of the client's technology division as well as the existing technical and political structure within the client's organization. This included understanding internal and external stakeholders and their objectives.



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### **Focusing on Customer Benefits Rather than on Technology**

Equipped with more data and insight from the customer, the team members went back to work to refine the business / engagement plan, adding the "Cassandra Model" template to the end of their process to focus, understand, and cost the benefits analysis for a proposed solution. Cassandra helped focus the team on the benefits for the customer of the technological solution, instead of on the technology itself.

As a result of the business planning process, the team constructed a model that:

- started with the client's visionary purpose and focused on the measurable benefits of the proposed solution to the client, and
- addressed the required processes, functions, and business redesign before speaking to the IT application and the infrastructure behind them.

Since all of the relationships within the system were graphically displayed, the model ultimately showed exactly how, through a series of linkages, each specific part of the network (i.e., the infrastructure and the related proposed solutions) would ultimately help achieve one or more of the client's "visionary purposes."

### **Closing the deal**

The collaborative presentation was key to helping the company and its provider to win the bid and has put them in a strong position to gain even more business from this important client over the next several years.

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