

THE RELATIONSHIP FOUNDATION



This checklist: Provides a reference about the relationship and the way it has been set up.

Addresses the question of whether the foundation is being laid to support a successful relationship.

What? This checklist will help you ensure you have covered off the critical discussions with your partner.

It allows you to reflect on what has been covered/ discussed; and identify what has/ hasn't been made explicit about the relationship.

How? It is suggested that you and your partner both review and reflect on this checklist. You may chose to do this separately and then meet to discuss the two perspectives, or you may work through it together.

It highlights areas for further discussion, clarification or action.

Notes: The relationship foundation is strengthened by using other tools in this Toolkit.

In particular:

- } Question 3 – refers to making expectations explicit. The 'Expected Outcomes' worksheet can be used to record these.
- } Question 4 – refers to the exchange of value. Use the 'Value Exchange Table' worksheet to document the exchange.



Tip

If you have a number of existing relationships, you may consider using this form to conduct a review of each relationship. This will help you determine if you and the partner need to refresh the relationship or realign your perspectives.

RELATIONSHIP FOUNDATION CHECKLIST

	✓
1. The value of working together is clear and we have an aligned vision about our purpose in the relationship.	
2. We have both shown intention and <i>commitment</i> to a true partnering approach	
3. The outcomes and expectations are documented and mutually agreed/ understood.	
4. There is a shared understanding about the exchange of value (what we each contribute and gain in return)	
5. Engagement: <ul style="list-style-type: none"> - How well do we listen and communicate with each other? - Does everyone know how to work together? - Do key people meet regularly and review their expectations? 	
6. We have an agreed and documented approach to: <ul style="list-style-type: none"> - Risk sharing - Financials - Customer 'ownership' - Intellectual property (pre-existing and post relationship rights) - Branding and brand reputation 	
7. We are aligned in our desires and approach (and have documented it) regarding: <ul style="list-style-type: none"> - speed to market - quality - safety - people - ethics 	
8. The above areas of understanding are documented and the document used as a working reference: <ul style="list-style-type: none"> - Have we a relationship agreement? - Are we aligned in our intention to use it as a reference to record, monitor and review the relationship? 	
9. Any outstanding issues or concerns have been noted for ongoing review and management	

"Well begun is half done"- Aristotle