



Institute for  
Collaborative  
Working

THE

# PARTNER

25  
years

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# **ICW Board Members**



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of Watford, Chairman**



**Les Pyle,  
Chief Executive**



**Barry Sheerman MP**



**Andy Scott, CBI**



**Dawn Marriott-Sims  
Capita**



**Charlotte Stilwell,  
BIS**



**Douglas McCormick,  
Sweett Group**



**David Hawkins, ICW**

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## Lord David Evans of Watford



### **Can collaboration cope with the cyber challenge?**

My first involvement with the Institute for Collaborative Working (PSL as was) was in 2001 when the team presented their vision to a House of Lords working party. The values they were promoting were very much aligned to my business experience – invest in collaborative business relationships and the competitive advantages will emerge. This led to me join the Institute Board, subsequently to become Chairman in 2006.

The Institute has come a very long way over the intervening period. From an organisation that was almost exclusively UK focused the Institute has grown into today's enterprise, widely recognised as the premier collaborative working thought leader not only in the UK but with an increasing International reputation. Clearly the International aspects of the Institute's activities will continue to grow as the collaborative working standard – BS 11000 evolves into ISO 11000 (referred to frequently

throughout this publication). The arrival of ISO 11000 will give the Institute the opportunity to build an international business stream, some of it by leveraging the strong business relationship it has with multi-national enterprises whose UK operations are members of the ICW network. The Institute's growing business relationship with the Pentagon (US Department of Defense) is evidence of this, as it involves a number of important ICW business relationships that began with UK activities.

One of the key roles of a Chairman is to help to identify important global developments where a business, in this case Collaborative Working, has an opportunity to make a significant impact. Many observers believe that Cyber Security – almost unheard of 10 years ago – is now one of the most critical challenges facing international businesses. There is a growing number of criminal organisations operating on an international scale that would seek to inflict harm / damage on legitimate businesses for various reasons. These organisations are frequently well funded which leads to their methods becoming increasingly sophisticated. To combat this growing threat, international businesses must themselves become ever more vigilant and sophisticated in their surveillance / protection processes in what is an increasingly complex situation. Collaborative working is at the heart of this issue. The criminals who are intent on wealth destruction are clearly "sharing" their knowledge with others, with similar twisted objectives, to establish their own form of competitive advantage. This demands that those who have the intelligence, tools and techniques to counter these threats must share their knowledge for the greater good – in other words collaborate.

The Institute held a Collaborative Working event in 2013 on Cyber Security, which highlighted the advanced approaches being taken by a number of our major business partners. Since then the position has developed considerably both for aggressors and protectors to the point where I believe we need to figure out how best to give added momentum to Collaborative Working in Cyber Security across borders. Smart Cities is a particularly important priority – where effective cyber security and collaborative working are essential ingredients to achieve a safe and successful outcome.

**Lord David Evans – Chairman**

## Les Pyle – ICW



### **25 years and counting!**

When Lord Joseph formed what is now the Institute for Collaborative Working in 1990 he could not have envisaged that 25 years later the UK would be on the threshold of launching a global standard for Collaborative Working (Partnering sic). His vision of a strong Partnering culture as a source of competitive advantage for UK Plc has evolved to offer this advantage worldwide to all who subscribe to the principles embodied in the methodology. I refer of course to BS 11000: the collaborative business relationship framework which within the next year or so will become ISO 11000. Hence a UK initiative becomes a global approach – a tribute to the many UK based organisations whose good practice, knowledge and experience have been shared through what is now the our Executive Network and distilled to develop the BS 11000 methodology.

25 years and counting – Collaborative Working has come a long way but there remains much work to do for the methodology to be fully recognised as a professional business discipline and adopted across all business sectors (public and private) and throughout the various value chains from big players to smaller participants.

Initially the Institute focused almost exclusively on knowledge sharing through the Executive Network community. This remains an important aspect of our activities with regular knowledge sharing events increasingly featuring innovative approaches to collaborative working. The growth in interest in collaboration has led to a more formal, structured approach to management of the wider collaborative working agenda, the most important initiative being the appointment of a Foundation Management Board comprising a number of collaborative working champions who collectively drive thought leadership and agree investments in the subject.

Skills development represents a major and growing area of investment with the development of specific business related collaborative working training programmes delivered in conjunction with academia. The individual membership scheme, launched at the House of Lords last year, seeks to create a more inclusive approach to collaborative working – an important step in raising the professional standing of collaborative working through a widespread collaborative knowledge sharing community. The on-line Self-Assessment tool has been developed to raise awareness of the principles of BS 11000 and as a way of spreading the BS 11000 message as widely as possible.

Our first 20 years or so focused primarily on UK based activities. Increasingly the Institute is becoming actively involved in addressing International collaborative issues. This trend is expected to accelerate as BS 11000 transforms into ISO 11000. In recognition of this we are in the process of establishing arms-length collaborative working knowledge sharing foci across the world the first two being ICW Africa and ICW Canada.

An increasing part of the Institute's role is to help clients understand the importance of collaborative working and the principles of BS 11000 – specifically how this can add value to their own business. This role is primarily one of knowledge transfer (NOT consultancy): ICW seeks to help organisations to become self-sufficient with collaborative working understanding, capabilities and skills.

My final point is to highlight the importance of behaviour. Whilst successful collaborative working requires an effective process it also requires the right attitude and behaviour to deliver the full benefit. Building a widespread understanding of the required combination of effective processes and appropriate behaviours, with the tools to support them, is a key objective as we embark on the next 25 years of our collaborative working journey.

**Les Pyle – Chief Executive**

## **John Cridland – CBI**



### ***A joint journey and two special celebrations!***

25 years ago when the CBI and the DTI, as it then was, launched Partnership Sourcing the business environment looked very different. Interest rates were at 14%, inflation was nudging double figures and we were on the verge of recession. We felt a new approach to customer/supplier engagement was needed – not the all too often adversarial relationship but a genuine partnership with business benefits to all parties based on longer term value for money not simply lowest price today.

From those early days, Partnership Sourcing has evolved to become today the Institute for Collaborative Working and that name change is particularly pertinent. Yes, partnership and collaboration remain just as important in the procurement process, not least with increasingly global supply chains, but collaborative working has become so much more in today's inter related business world. It is just as much about early stage design collaboration or joint service provision. It is informal business partnerships or more structured joint ventures. It is business to business, but equally engagement with academia and the third sector. It is the public and private sector working together. And it is working practices and skills' sharing within organisations as well as between them. In short it is the glue which holds together a successful organisation and can give it real competitive edge.

And the ICW is helping to get collaborative working embedded in organisational practices not just here in the UK. The achievement of a British Standard for collaborative working was a big step forward, but this provided the launch pad for seeking a full ISO standard which is now very much on track. And it is great to see the international interest this is generating, establishing the UK at the forefront in the collaborative working space.

The CBI has been pleased to support the ICW on this journey over the last 25 years. I pay tribute to all those organisations who have embraced the collaborative working concepts and encourage others to follow suit. I would also like to acknowledge the terrific work of the small executive team without whose enthusiasm, commitment and sheer determination none of this would be possible.

As the CBI celebrates its own milestone this year – our 50th anniversary – I congratulate the ICW in championing the collaborative working cause these last 25 years. Here's to the next 25!

**John Cridland – Director General, CBI**

## **Martin Donnelly – BIS**



### ***BIS and ICW – still partnering 25 years on (and the rest!)***

I am pleased to send my warm congratulations to the Institute for Collaborative Working on the occasion of their 25th anniversary. When the then DTI (now BIS) and CBI brought about its first incarnation in 1990, as Partnership Sourcing Limited, the aims were clear – to support businesses by promoting a partnership based approach to the relationship between customer and supplier. A lot has changed in the last 25 years but the importance of strong partnerships and genuine collaborative working has not.

Over the last 25 years, the ICW has led the way on collaborative working. A truly unique organisation – the first of its kind in the world – the ICW has achieved an incredible amount in that relatively short amount of time. The ICW has created a real buzz around the whole concept of using collaboration in a business context. It has established strong links with Parliamentarians and has attracted a membership of UK companies of all sizes.

But ICW is not just about spreading the word about collaborative working and sharing good practice. In 2006 the ICW launched PAS11000, a Collaborative Working framework and four years later it became a full British Standard – BS 11000 – the world's first British Standard in relationship management. Over 100 organisations have achieved BS 11000 certification since its launch – a fantastic achievement. As a result of strong interest from around the world, the ICW is now in the process of taking this globally with an International Standard – ISO 11000. I am sure the next 25 years will see international interest and commitment grow.

Both BIS and ICW have undergone a number of incarnations since those distant days in 1990 but those founding principles remain and we are proud to be a partner of ICW today. I look forward to our partnership continuing to flourish as we embark on the next 25 years.

**Martin Donnelly – Permanent Secretary, Department for Business, Innovation and Skills**

# Barry Sheerman



## **Collaboration – onwards and upwards!**

Having been on the ICW Main Board (previously PSL) for approaching 20 years I am delighted to write this foreword for this very special edition of the Partner to mark ICW's 25th anniversary. Collaboration has come a long way since the start when it was established to take forward the then UK Government's partnering initiative to promote the competitive advantage of a partnering approach to business throughout the UK public and private sectors.

Since then, with the aid of the structured approach advocated in BS 11000, a collaborative approach to business has become widely recognised as a key to effective business performance which is vital in order to achieve a sustainable and dynamic industrial sector in this fast-moving technological world.

As Chairman of the public policy group Policy Connect (a long-standing ICW Executive Network Member) I am actively involved with the 'Exported by Britain Campaign'. This

exciting campaign presents an opportunity for the UK to challenge the myth that we no longer export significantly to the rest of the world. Long-held myths can only be demolished by sound argument based on factual information, and the campaign will ask every MP to nominate products that are exported from the manufacturing and creative industries within their constituencies. The intention is to highlight for the first time the diversity and prevalence of exporting across the UK.

The campaign will encourage MPs to engage directly with these industries to get to know and understand more about their challenges and their successes both to stimulate and encourage them to maximise their future potential.

Fundamental to a successful export programme is to have highly skilled people delivering the product or service – these are not just technical skills but also the 'softer' skills such as communication, collaboration, adaptability, and innovation. Bringing these skills together in a focused and motivated team is the best recipe for success.

In order to achieve this it is important that individuals have appropriate continuing training and development as part of their undergraduate training, through post-graduate experience and through skills development programmes within the organisations in which they are employed.

ICW has taken the lead in recognising collaborative working as a fundamental business discipline requiring relevant training and skill development offerings. In order to develop this we are working with several academic organisations with the goal of having 'Collaborative Working' incorporated within various Business courses. Most recently the Institute has launched an MSc elective module for Collaborative Leadership with Warwick University – this is clearly a most important initiative. Watch this space!

I wish ICW all the best for the next 25 years – onwards and upwards!

**Barry Sheerman MP – Board Member**

## **Dawn Marriott-Sims – Capita**



### **Our journey with O2**

Last year I wrote about one of Capita's newest collaboration: a joint venture with the Cabinet Office, Axelos. But this year I'd like to focus on one of our oldest and most enduring collaborations: partnering with O2.

It began back in 1992 when Capita and O2 signed a contract to support a launch into the consumer mobile phone market. The operation went live with just 40 members of staff and now employs more than 4,000 people across Yorkshire, Scotland and North West England. Now, in 2015, Capita is one of the UK's leading providers of customer management services, handling over 100 million customer contacts and delivering services for 35 clients, including O2.

O2's overriding aim is to remain number one for customer service – so our vision for the collaboration is to give them exactly that: the best

customer service in the mobile sector. O2 assesses the partnership against a number of different criteria across key areas – and Capita currently rates number one against other suppliers.

Recognition of quality comes from independent observers too. In 2012, the Capita and O2 small business award team were highly commended at the Customer Contact Association (CCA) Global Excellence Awards and in 2014 won Best Outsourcing Partnership.

And our collaboration with O2 goes way beyond the commercial – we're also keen to support them in meeting their corporate responsibility aims. In 2012 we worked with them on two 'Think Big' initiatives to help improve the lives of children in the local community, one at Swinton Fitzwilliam Primary School – transforming the outdoor space – and the other at the Brookfield's Children's Centre. Both projects were a success and, following the work we carried out at the primary school, they were successful in securing a partnership award, through the healthy schools team in Rotherham.

A lot of lip service is given to the phrase 'partnering' and it is, sometimes, inaccurately used to refer to traditional supplier-buyer relationships. But our work with O2 embraces both the practical aspects and the true spirit of the word – with both parties working together to our common benefit and, importantly, to the benefit of the wider O2 community.

**Dawn Marriott-Sims – Board Member**

# Douglas McCormick – Sweett Group



## **Industrial partnerships – taking collaboration to the next level**

The last year has been a time of considerable professional change for me. On the 2nd March I took up the position of Chief Executive at Sweett Group, an independent provider of professional services for the construction and management of building and infrastructure projects. Sweett Group provides quantity surveying, project management and a whole range of specialist and advisory services.

At Sweett Group collaborative working methods are an essential part of everyday life when creating solutions for successful project delivery. Later you will read two interesting case studies where Sweett Group applies collaborative working philosophies throughout the business and specifically through its project delivery behaviours.

As most of you are aware I am a Commissioner for the UK Commission for Employment and Skills (UKCES).

UKCES is a publicly-funded, industry-led organisation that provides guidance on skills and employment issues. I'm one of 30 Commissioners, representing large and small employers, trade unions and educationalists from all over the UK. What we share is a belief that it is the talents and skills of people that create competitive businesses and successful economies. Uniquely, UKCES combines labour market intelligence and employer leadership to galvanise effective collaborative action in strategically important industries to set standards, shape and quality assure world class apprenticeships and other training and tackle pressing employment and skills challenges. That in itself is a pretty major piece of collaborative working, but the projects with which we are involved take working collaboratively to a new level.

Take, for example, the new industrial partnerships which have been established in eight sectors. Supported by UKCES, each partnership brings together employers across an industry sector to lead the development of skills, with a focus on growth and competitiveness. There are currently eight partnerships covering the aerospace, automotive, creative, nuclear, digital, energy & efficiency, science and tunnelling (construction) industries.

Each industrial partnership is chaired by a major employer and is a platform for businesses of all shapes and sizes in the sector to define and influence skills priorities. While the shape and scope of each partnership is defined by its employers, all partnerships share a commitment to tackling skills shortages, testing innovative training solutions with their sector, and overcoming the skills shortages that have restrained whole sectors from achieving their potential. They are supported by Trade Unions, trade and professional bodies and Sector Skills Councils.

Through collaborative action they aim to improve the skills and employability of their current and future workforce, and in doing so increase productivity, build their capacity to innovate, and strengthen their world class position. Where an industrial strategy is already in place for a sector the relevant partnerships priorities are aligned.

These eight partnerships are funded up to March 2017 through a co-investment model, with the government investing £131 million through its Employer Ownership Pilot fund. Government investment is matched by cash and in-kind from the employers, creating a total fund of £354 million. In other words, for every £1 of government investment, businesses are investing £1.70.

UKCES has supported the partnerships through their early stage development and continues to work with them as they define their long term strategies. And me? I'm looking forward to seeing these examples of true collaborative working in action.

**Douglas McCormick – Board Member**

## David Hawkins



### ***A time to reflect but also to be bold and push onward***

Anniversaries are frequently a time when we take the opportunity to look back and indeed for ICW there is a lot to take pride from what has been achieved in our 25 years. Checking the rear view mirror I doubt any of those who came together back in 1990 would recognise where we are today. To be honest since I joined in 1995 the profile of the Institute could not be more different. Back then we had 30 steering group members, most of whom have moved on, so looking at today's 90 Executive Network members clearly the desire to adopt and promote collaboration grows unabated.

It has been perhaps our most dynamic year yet with the launch of the Individual Membership Scheme and our

increased focus on skills development, including the pilot of the Collaborative Leadership MSc module with WMG (Warwick University), the launch of a major research project through Warwick University which will culminate in publication later this year and our Collaborative Awards which will be held in November this year. Activity in the UK continues to grow as the recognition of the benefits of collaborative working opens doors in new sectors of industry. The growing number of companies now certified to BS 11000 is a clear demonstration that both the private and public sectors are recognising the benefits of the structured approach launched back in 2004.

At the same time our reach internationally grows, stretching from the Americas to Australasia, and particularly our friends in Washington. No doubt much of this is in part driven by the development of ISO 11000, where the UK leads the way through BSI and ICW, remains on track with the target of late 2016 still in our sights. The challenge now is to maintain the momentum and build on the knowledge and experience gained to date.

As we have grown in the UK so interest increases within local communities. Our efforts through ICW-Wales are beginning to bear fruit prompting the embryo of ICW-Scotland which we hope will become fully active later this year. Further afield ICW-Africa is well on its way to establishing its community along with newly established ICW-Canada. Each follows the ethos of creating a knowledge sharing community of best practice and links with and builds on the foundations we have laid in the UK.

They say you should be careful what you wish for but on a personal level I could not be more satisfied with the progress we have made and my thanks to the Foundation Members, the Executive Network and the ICW core team of Associates, without whose support my wish might have become a night mare.

As I said anniversaries may be a time for reflection but we are focused on the future and there is still much we can and want to do- so onward and upwards towards our 30 years and more 'Pearls of Wisdom' to be shared!

**David Hawkins, Knowledge Architect and Operations Director**

## Introduction by the Editor – Nicky Painter



How exciting to be the Editor of this special commemorative issue of the Partner to mark ICW's silver anniversary! This is a great achievement to which many of you have referred in your articles and I add my own congratulations.

Well, we gave you a pretty free hand with the Partner this year and I'm pleased to say that we have finished up with a group of interesting and disparate articles to reflect this.

You will have read the Main Board Forewords by the time you get to this page and will note that there have been a few changes. First, Lord Tony Berkeley has left the Board after fifteen years. It is sad to see him go and his support over the years has been much valued. Second, you will see that Douglas McCormick has left Atkins and moved to Sweett Group. He remains a Main Board Member and has contributed a very interesting article in his new incarnation which includes two informative Case Studies (P.81).

We're honoured that – to mark this special occasion – the CBI and BIS Forewords have been written by Director General John Cridland and Permanent Secretary Martin Donnelly respectively. These were, of course, our founder organisations back in 1990 and it is great to get commendations at such senior levels.

There have been some Management Board changes too as you will see from the logos below and the following pages. We are very pleased to welcome a new Foundation Member, Babcock International, represented by Tim Redfern. His article on page 45 focuses on Babcock's work collaborating with MOD. But we are sorry to say farewell to PERA, not least because they have hosted our Collaborative Leaders' course for the last four years. This task is now being taken on by Warwick Business School who are also supporting us with developing and promoting graduate and undergraduate education in collaborative working.

An important new initiative – introduced to coincide with our special year – is the setting up of the ICW Awards Scheme which recognises excellence in collaborative working in a number of categories. You can read more in Dave Hawkins' article on page 111 (and on our website). **NB Nominations need to be received by the end of May – so don't hang about!** Also read about our new Training and Development programme (inside back cover) being managed by ICW Associate John Osborne.

Our ongoing **Individual Membership Scheme**, introduced this time last year, is going really well and is now managed by ICW Associate Clive Winkler.

Returning to 'The Partner', I would like, as ever, to say a huge 'thank-you' to Andy Crouch of the Roman Group – our kind, tolerant and forbearing graphic designer. How he puts up with me with such good humour and patience I have no idea!

And last – but by no means least – I'd like to thank everyone who has contributed to this year's edition – and put up with my constant nagging about deadlines with such good grace and humour! I wish you all a most successful year and hope to meet many of you at one of ICW's networking events.

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### ICW Foundation Members





### Collaboration Across Cultures

When I became involved in collaborative relationships back when PAS 11000 was first developed, I had the preconception that it would work best between organisations with similar internal cultures. I believed that having the same views, ideas and behaviours would lead to a more successful outcome of any collaborative partnership.

And certainly, over the past few years, we have seen a number of barriers to collaboration caused by culture, evidenced in both characteristic and behavioural differences and also geographical.

But what we have seen more recently is how the value of collaborative working has overcome those barriers and flourished across and between different cultures. Businesses from different countries are collaborating, as are groups from diverse sectors and very different types of organizations have demonstrated real success working together – industry and academia for example.

One thing they have all had in common is excellent and thorough partner selection processes which have been designed to **break down barriers**. These have included workshops and team building exercises at the conception stage. This kind of activity proves invaluable in helping groups to share and embrace the experience of developing a collaborative relationship.

When discussing collaboration and the exposure of the approach with individuals, discussions quickly turn to collaborative workshops and the experiences of team building at an early stage in the process and how it helped to bring them on the journey.

But when planning these workshops it's important to consider the identification of different social styles and methods of communication. You can then tailor the activities and groups involved to create an environment where personal styles are understood and issues can be identified that might impair the dynamics of the team going forward.

As the relationship progresses, the behaviours of individuals should be continually monitored. This insight can enlighten the management team and help shape the overall approach to communication within the relationship. This is not always an easy process and difficult choices may need to be made regarding team construction if the relationship is to reach its full potential.

There is a clear advantage to this process being applied at such an early stage in the formation of the relationship. For example, it can help to ensure that all those involved have a clear understanding of the potential benefits of working collaboratively and help to secure their buy-in and commitment from the outset.

Once the firm foundations for a collaborative approach are in place, it's amazing how different cultures can be seen to complement one another, bringing an extra depth to the relationship and often helping those involved to realize unexpected benefits.

This can be seen within motorsport. The requirements of a Formula 1 car designer to work in collaboration with the engine suppliers, electronics systems and gearbox manufacturers provides a challenge, however with clear communication many business and geographical cultures are combined to create a competitive solution.

This same approach is utilised in industry. Take the Airbus A380 as an example: this was assembled in Toulouse, France with components manufactured from the United Kingdom, Germany, France and Spain. Once the assembly had been completed, the A380's were flown to Hamburg for internal fittings and finishing – a true collaboration with challenges across cultures, both business and geographical has delivered over 150 planes since 2007.

It's clear to me that working collaboratively brings enormous benefits and value to those who embrace it. BS 11000 provides the framework to allow organisations to establish systems and practices that support the creation of successful collaborative partnerships. Processes are important, procedures are helpful but people are key – and regardless of our backgrounds or our diversity, we can all work together to build mutually beneficial relationships.

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# BS 11000 – a tool to support building a sustainable business

**Carla Whyte, BSI**

It's been another great year for BS 11000 and collaborative working relationships at BSI. Mid-year 2014 we were delighted to be the first organization to be officially recognised by the ICW's BS 11000 certification validation scheme. As both a UKAS and ANAB accredited business, we share the ICW's desire for a credible and consistent approach to assessment for BS 11000 and were keen to get involved when the scheme was launched last May.

The development of the International standard has made good progress in the last 12 months with Finland joining the working group most recently. The next Working Group meeting takes place in Kuala Lumpur in April – it's hoped that the location will encourage participation from Asian countries in order to provide balanced international representation. Publication of the new standard is on track for the end of 2016.

We're very pleased to report that interest in certification to BS 11000 continues to grow. We've noticed an increased interest from SMEs in the past 12 months, particularly in those industries who were early adopters of BS 11000 and where there has been greater exposure to the benefits of collaboration. This is testament to the support and commitment of industry leaders who are keen to see the benefits of collaboration realised throughout the supply chain.

## An evolution

Last year we talked about the evolution of collaborative working and a shift in focus for organizations from projects or individual relationships, to a more strategic approach to partnerships and the resulting longer term benefits. It's really encouraging to look back today and see how far industry has come in the 4 years since BS 11000 was first published at the end of 2010.

Whilst it's true that the main driver for certification still seems to be that organizations feel they need to have it, as the Standard matures, businesses are beginning to realise the full breadth and potential value to a collaboration built around a proven framework. Indeed the value of creating alliances as a strategy for supporting sustainable business

seems to be finding its way more frequently to the board agenda.

The barriers to collaboration, including cultural differences and geographical challenges, are being overcome and success stories are widespread amongst those sectors that embraced BS 11000 early on.

Our customers tell us that collaborative relationships are exceeding their expectations with many of the longer term benefits now starting to come to fruition. Businesses that initially benefitted from sharing the risks associated with the delivery of projects are now seeing the additional, positive effects of broadening their knowledge pool, sharing ideas and finding efficiencies in new ways of working.

This appears to be apparent in organizations of all types and sizes. SMEs have adopted and implemented processes and working practices from larger partner organizations and those larger businesses are seeing the benefits of the flexibility/agility of smaller organizations.

Whilst many organizations are able to relate direct and specific cost and resource savings to BS 11000 certification, we have seen that significant value lies outside of those more obviously tangible benefits. For example, one BSI customer highlighted the evolution of an idea from a collaborative partnership that has gone on to have a significant and longer term impact on their carbon footprint. This will continue to deliver for many years to come.

Another, has driven cultural changes learnt through the BS 11000 framework across their business, creating a more streamlined and effective way of working and a more motivated workforce. Some organizations are making collaborative skills a requirement at the point of recruitment and embedding them also into personal development programmes.

Key to understanding the full benefits of BS 11000 certification is measuring and tracking. This begins with understanding your own needs and expectations for your collaborative partnership. Take time to think about how you can optimise the

value from your management system and consider the full potential impact of adopting this 'people-based' standard across your business. Make sure you document your thoughts so that you can track and measure progress from the outset.

We were delighted that the Partnering Support Group team from the MoD joined us to run a workshop on benefits tracking earlier this year. They facilitated a comprehensive discussion to measurement and tracking which included capturing innovations, costing benefits, reward and recognition and benefits tracking models. It's clear that those with a strategic approach to identifying all possible benefits and opportunities from day 1 are far more likely to realise the full potential of their collaborative relationships.

## Looking ahead

I mentioned earlier that collaborative relationships are making a more regular appearance on the board agenda. One reason for this could be the number of high profile business continuity incidents covered by the media last year meaning threat analysis and prevention planning has never been more critical.

Risks to the supply chain have been identified as the fastest growing concern for business continuity professionals globally<sup>1</sup> and organizations are starting to appreciate the value of relationships to support sustainable business practice. We have also experienced a growing interest in BSI's Supply Chain Solutions which suggests that increasing attention is being given to suppliers and partners that are critical to business continuity.

This isn't new and many businesses have formed long term, strategic customer/supplier relationships for years, as a matter of good practice. What we

are hearing is that there may be a new drive to formalise those relationships – this may also impact the partner selection process with organizations keen to understand the potential risks more fully.

Geographical location is a good example, with natural disasters, economic and political instability all possible threats to continuity of supply.

This reinforces the value of collaborative business relationships at a strategic level, for future proofing and supporting business continuity.

## Looking forward to 2015

We continue to be excited about the growth of BS 11000 as its benefits are demonstrated time and time again. We have nearly 120 partners now certified or in application and we are learning from every partnership as no two are the same.

As the development of ISO 11000 progresses, we are anticipating greater interest from overseas and can only imagine the possibilities for this 'future potential' standard.

A little closer to home, we are delighted to be sponsoring the first ICW Collaborative Awards taking place this year with a presentation event at the House of Lords in November and are looking forward to seeing many of our customers involved.

To talk about certifying to BS 11000, or to find out how BSI's Supply Chain Solutions can help you to analyse the risks in your supply chain, call us on 0845 080 9000.

<sup>1</sup>BCI Horizon Scan Research 2015 produced in association with BSI.

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## Building partnerships for the future

In business, as in other walks of life, teamwork can pay real dividends. Companies that work together can often achieve much more than they can achieve alone.

To find out more about BS 11000 assessment, training and certification solutions from BSI, visit [bsigroup.com](https://www.bsigroup.com) or call a BSI advisor **+44 845 080 9000**.

Make the most of your partnerships by investing in BS 11000 collaborative business relationships. Collaborative working can be great for business. It gives you access to more services, more opportunities to win business and the resources to compete for bigger contracts. BS 11000 provides a common structure and language for businesses looking to collaborate. It defines roles and responsibilities and facilitates share of information, costs, resources, skills and risk, reducing delays and leading to the best business outcomes for all involved.

Whether you're new to BS 11000 or want to take your expertise further, we have the right training courses, resources and services. We offer packages that can be customized to your business to jumpstart your collaborative relationships and BSI's BS 11000 products and services can be designed to remove the complexity of getting you where you want to be, whatever your starting point.

# Making Collaboration Work

- Leveraging value creation to deliver the £38bn CP5 determination
- Managing the risk of collaborative working



- Reading (IMP 1&2 Packages)
- Reading Station
- Crossrail – South East Section Project
- London Bridge Area Partnering Programme
- East Kent Resignalling Phase 2
- Southern CP5 Frameworks



### **Collaboration: prevention or cure?**

It's been my absolute pleasure to work with the Institute for Collaborative Working (ICW), in its 25th year of operation since being founded (as PSL) in 1990. In a separate article in this edition of the 'Partner' I track Network Rail's continued journey along the collaboration pathway. For me it's been a challenging year as we endeavoured to clearly define and segment our relationships. Where a collaborative contracting strategy was selected

our hope was that this way of working would be more familiar for our project teams and partners than it proved to be. Our re-certification journey showed me that we were not as far down the path as I thought we were. There remains a lot of work still to do.

At a recent Major Projects Association evening debate, Martin Arter (a Programme Development Director for Network Rail) commented "When antibiotics were first used they had an enormous and immediate positive impact on health. Vaccination did not have such a large and obvious impact on health as antibiotics. However, some 200 years later it has eradicated smallpox completely. Vaccination works by aggressively treating every outbreak of disease and developing a herd immunity. By addressing each 'outbreak' of non-collaborative behaviour and making collaboration the norm, managers "vaccinate" their teams and lead the culture necessary for collaboration to thrive."

In any pioneering research you need 'thought leaders' who can invest the time and effort to research and promote different approaches. So when moving from leeches to vaccination, you need 'experts' to champion the way forward and provide support and reassurance for those who are committed to changing. This is the role of ICW, who have developed a vaccination against opportunity loss and a silo mentality. They continue to search out ways to improve their treatment as well as expanding its reach internationally.

It's been a busy year for the Institute as they drive forward the ISO 11000 standard and cement their position as custodian to the principles of collaborative working through its membership. An important development in this regard was for the Institute to recognise those bodies who certify organisations working to BS 11000, to ensure they will rigorously and consistently measure compliance to the best practice promoted by the Standard. This will safeguard not only the Standard and the organisations who have certified, but also those who rely on such qualification as a measure of high collaborative credentials.

The Institute now recognises the talent and competence of individuals through their membership scheme. Also in this edition an Award Scheme is announced so individual and organisation collaborative excellence can be recognised and celebrated.

So when faced with the continued challenge of nurturing and leading the culture and behaviour change necessary for Network Rail to make the best practice promoted by the Standard 'business as usual', it's reassuring to have ICW as a partner helping us along the pathway.

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# Collaboration in crisis and calm

## Mike Pollard, Network Rail

It's been a year of dramatic change with significant highs and lows. From a Network Rail leadership perspective we have had a number of new appointments to the executive, including Francis Paonessa as Infrastructure Projects Managing Director and Senior Executive Responsible for Network Rail's relationship management system.

In addition, Mark Carne, has joined as Network Rail's CEO. Mark has identified three core principles which he believes will fulfil our ambition to lead the rail industry to deliver better value for money and an infrastructure that meets the needs of Britain in the 21st century. These are:

- Delivering outstanding business performance and leading safety performance for everyone who works, uses or comes into contact with the railway.
- Following structured continuous improvement to ensure we learn from the past and achieve even greater business performance in the future.
- Seeking and delivering innovation that allows our infrastructure to take full advantage of digital technology.

Making collaboration work is the critical link between achieving these outcomes and how we plan and implement our works.

### Context

Network Rail owns, operates, maintains and enhances Britain's rail infrastructure. The infrastructure includes tracks, signals, bridges, tunnels, level crossings, viaducts and 18 key stations. We operate within the UK, employing nearly 35,000 staff working cross functionally and manage £4.5bn in annual expenditure with around 3,700 suppliers. Network Rail is a supplier dependent business with nearly 70% of funding being spent externally. As I advised last year, Network Rail has been charged with the responsibility of spending £38.3bn on the railway which encompasses capital expenditure of £24,925m in Enhancements and Renewals.

### Making collaboration work

Delivering such an expansive programme in an increasingly heated construction market place poses significant challenge and reinforces a need to consider and successfully implement collaborative approaches. Our experience of collaborative contracting arrangements in the last control period was positive (most projects delivered by collaborative delivery arrangements were delivered on or ahead of time and to budget), but it could have been better. To meet the efficiency and delivery challenges in this five year control period will require Network Rail and our partners continually to improve on its collective performance of yesteryear.

### Collaboration in times of crisis

The highs, from a collaborative delivery view point are probably best illustrated by the re-instatement of the Dawlish seawall last year. On the 6th February 2014 a combination of extremely high tides combined with an intense storm and resultant heavy seas caused extensive damage to the sea wall and the railway. This severed the connection to Devon (West of Dawlish) and Cornwall from the rest of the UK. Despite continued heavy weather the whole industry corralled immediately to reinstate the railway and minimise, as far as was possible, disruption to the travelling public. We all know collaborating in crisis provides common goals and purpose which usually results in great outcomes, but what was achieved at Dawlish was truly remarkable. The safe reinstatement of the railway in 4 months, achieved through an immediate response, round the clock working and the whole industry working in harmony.

Dawlish caught the public imagination and it reflects the achievement of thousands of railway people across the industry, affectionately known as the orange army, who tirelessly and often in the worst weather conditions the UK can muster, keep the railway system running all year. There are numerous examples I could cite, many of them unsung and unknown to those outside the



industry. At the time of printing this article, we have witnessed a similar achievement in the speedy reinstatement of the Chiltern line at Harbury (between Leamington Spa and Banbury) after a landslide deposited around 350,000 tonnes of earth on the railway into a cutting, immediately adjacent to a tunnel portal.

So we can collaborate in a crisis and very often it happens at the sharp end of our business, so how do we scale this so it becomes business as usual? Sadly when the industry doesn't get things right we disrupt the journey experience of thousands of people, as was the case at Paddington and Kings Cross over Christmas. Despite very difficult operational challenges, no one was killed or injured on those projects. At Kings Cross we were trialling new innovative equipment and methods which in the long term will help meet the efficiency challenge set by the Office of Rail Regulation (ORR). Thousands of dedicated people undertook 300 projects over Christmas and the New Year and 99 per cent of these projects were delivered safely and the railway returned to service on schedule.

Nevertheless, we failed to deliver outstanding business performance at Paddington and Kings Cross and we were rightly heavily criticised as a result.

### ***The rail industry is similar to a super-organism***

The impact on the public perception of the rail industry (and the key stakeholders within it) when we get it wrong can be catastrophic. The rail industry is an eclectic mix of public and private business models. A successful rail industry is essential for both business models. We need to do more collectively to ensure the health of the industry. In this regard the rail industry is analogous to a super-organism. The technical definition of a super-organism is "a collection of agents which can act in concert to produce phenomena governed by the collective" [Kelly, Kevin (1994). *Out of control: the new biology of machines, social systems and the economic world*]. In other words every part of the organism works for the collective benefit of the whole, capable of changing roles if that is the collective need. As an example consider a hive of bees. Further, the health and ultimately survival of the organism, is based on each part selflessly and successfully fulfilling its role. In my view, the rail industry super-organism is currently dysfunctional; this is something that collaboration will help to correct.

Working collaboratively in a team is actually an innate behaviour so the challenge is to get

everyone focused on the rail industry as 'the team'. Working in silos, focusing only on our own objectives and disregarding the consequences for others in the industry is easier but it is no longer sustainable. The plan for a digital railway, on which the future of everyone in the industry depends, needs a partnership thread. Modern railway technology is blurring the edges between vehicle and rail, as future train control is a whole system solution. In fact digital railway is exploring ways to improve the whole journey experience, in which everyone in the industry will play a part. Whilst the regulative arrangement tries to provide hard edges between train and infrastructure operators, innovation is pushing them together. The ORR and the Department for Transport (DfT) have introduced measures to promote collaboration across the industry: the Enhancements Cost Adjustment Mechanism (ECAM) for Network Rail and cross industry working requirements in new franchises for train operators.

A number of us are exploring how we develop the use of BS 11000 to support these goals. In addition we are working with the Rail Delivery Group to develop tools to support cross industry working which is covered by a separate article in this edition of Partner.

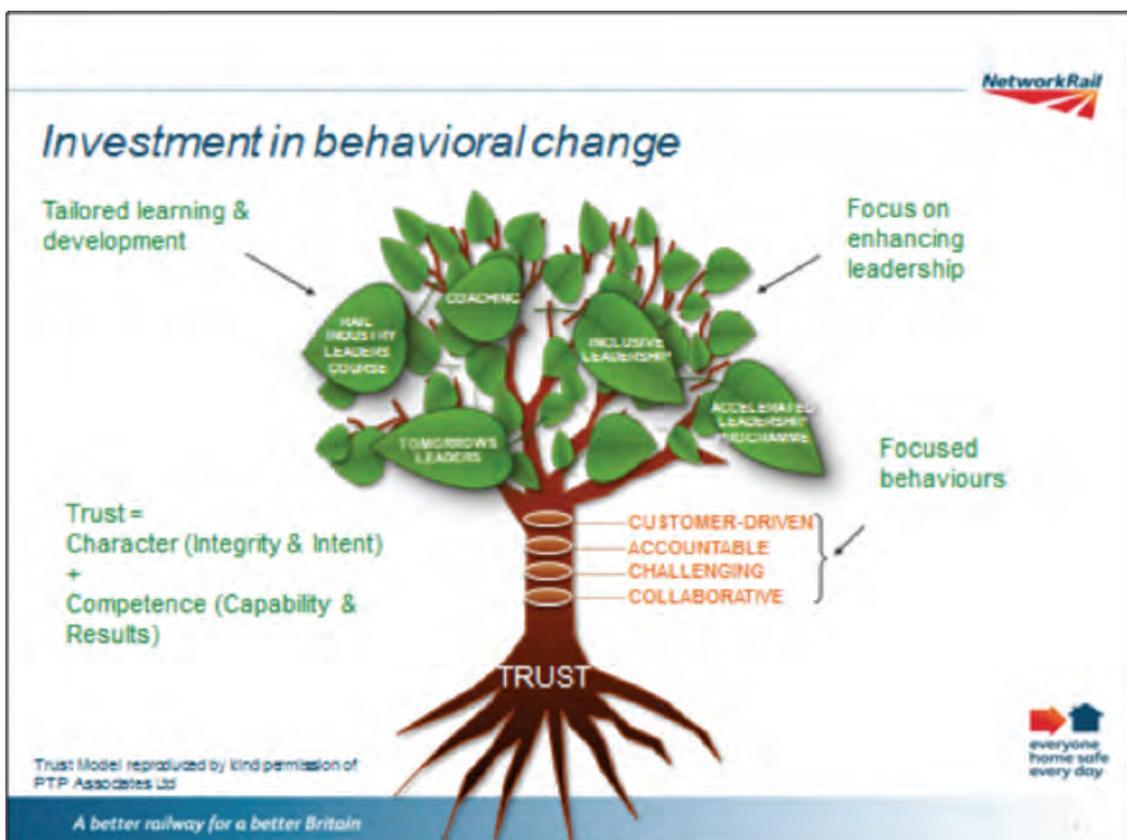
### Structured continuous improvement

Structured continuous improvement has been the theme for the past year for Network Rail's collaborative arrangements and will continue this year as we focus on enhancing the key three enablers to improved collaborative working:

1. Developing the learning and development through the spine of leadership from the executive through to first line management.
2. Improving the collaborative forms of contract, particularly Alliances which are the most sophisticated collaborative agreements used by Network Rail.
3. Our relationship management system based on BS 11000, as the strategic framework for collaborative working.

### Learning and development through the spine of leadership

Client procurement processes and behaviours condition the market. The companies we deal with are commercial organisations. Many of our larger, first tier, suppliers operate globally in different



sectors and by necessity are agile and adapt to different approaches in order to succeed. They will respond to the policies and processes that their clients adopt. Embedding a collaborative working ethos therefore requires Network Rail as a client to provide leadership and demonstrate a collaborative approach. Put another way, clients get the suppliers they deserve. If we truly want our partners to demonstrate particular attributes and behaviours then we as the client organisation have to lead the way. This is especially the case given that our previous approaches have left some within our supply base remaining to be convinced that we really are committed to change.

The collaboration needed will require a step change in culture, with everyone in the industry committed to behaving differently. We set aside business differences in a crisis but this has to become business as usual. Great collaboration demands strong leadership, executive commitment and a consistent approach. Culture change will not happen unless this is in place.

In response, I am developing a tailored learning and development programme that supports focused behaviours. Our leaders at all levels of the organisation need a much broader understanding of collaborative approaches and the challenges faced by others in the industry. Network Rail is also piloting certain learning programmes being run with partner staff, because learning together builds friendships and networks – a great environment to start building trust.

### Improving the collaborative forms of contract

Network Rail has spent nine months reviewing the contractual arrangements and performance of all the Alliances it has put in place over the last four years. It has also contributed to the 'Alliancing Best Practice in Infrastructure Delivery' published by Infrastructure UK and has adopted the recommendations of this. These exercises have culminated in the development of a Project Alliance Agreement Model which will be a consistent starting point for negotiating Alliance arrangements going forward. This model contains provision for industry stakeholders having an opportunity to influence the Alliance leadership and management teams, which was developed in conjunction with the Rail Delivery Group. The first pilot project using this model is East West Phase 2, which is currently being procured.

### Our relationship management systems based on BS 11000

Network Rail has completed its surveillance cycle with BSI as our certification body and we have just had confirmation that we have been re-certified. This marks a very significant milestone on our 'BS 11000 Journey'. We have learnt that progressing along the collaborative pathway requires continued vigilance and the relationship management system to be continually reviewed and improved. Many in the rail industry and in particular the supply chain have adopted the Standard, so often our relationships are with partners who are certified in their own right and have their own relationship management system. These suppliers are helping to evolve Network Rail's thinking to the next level of collaborative maturity.

We have altered our Corporate Relationship Management Plan to reflect this maturity and put in place an arrangement that is flexible to support a number of relationship management systems from 'Working Together' onwards.

Francis Paonessa as the Senior Executive Responsible was committed to maintaining Network Rail's certification status and on hearing of IP's success said "that's a great result". We are now exploring opportunities to expand the application of the approach promoted by BS 11000. In his collaborative working policy statement Francis states "I expect staff and Network Rail representatives to be equally committed and to act and behave in a way that builds trust with our partners and consider collaborative behaviours in all that they do. Network Rail, as an organisation, and the individuals within it, has to role model collaborative behaviours".

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# ***Network Rail has been working with the Rail Delivery Group (RDG) to tackle the cost of contingency on railway projects***

***Mike Pollard and Matthew Hannaway – Network Rail***

## **Introduction**

The Rail Delivery Group (RDG) has identified a number of opportunities to improve project outcomes and realise industry-wide benefits. A benchmarking study demonstrated that railway projects cost between 20% to 30% more than similar construction works by the UK Highway Agency and similar railways in Europe. The causes of this included different access provisions, applicable safety standards and planning permission processes, but a significant amount of this difference (5%-10%) was due to a combination of inter-party behaviours not found in collaborative projects. The RDG Asset, Programme and Supply Chain Management (APSCM) group has established a work stream to improve the identification and management of risk and contingency through better collaboration among industry stakeholders, including Network Rail (NR), Train Operating Companies (TOCs), Freight Operating Companies (FOCs) and Suppliers. The ultimate goal is to reduce the cost of contingency across the rail industry and improve the value it delivers.

## **High level summary of findings**

Rail industry stakeholders generally agree that effective management of cost and risk on a whole industry basis requires engagement of all key stakeholders throughout the project lifecycle. However, the quality of stakeholder engagement in risk and value management is highly variable as a result of the contractual relationships which regulate how the industry operates and limited incentive structures. The valuation of risk and the contractual mechanisms to deal with risk vary widely across Network Rail and its supply chain. Procurement methods also fail to provide all stakeholders with visibility of end-to-end project costs and risks, and lack incentives that encourage cross industry approaches to effectively manage these costs and risks.

At present the industry generally adopts a fragmented approach to risk and value management where threats and opportunities are owned and managed by individual parties. Risk identification and value management



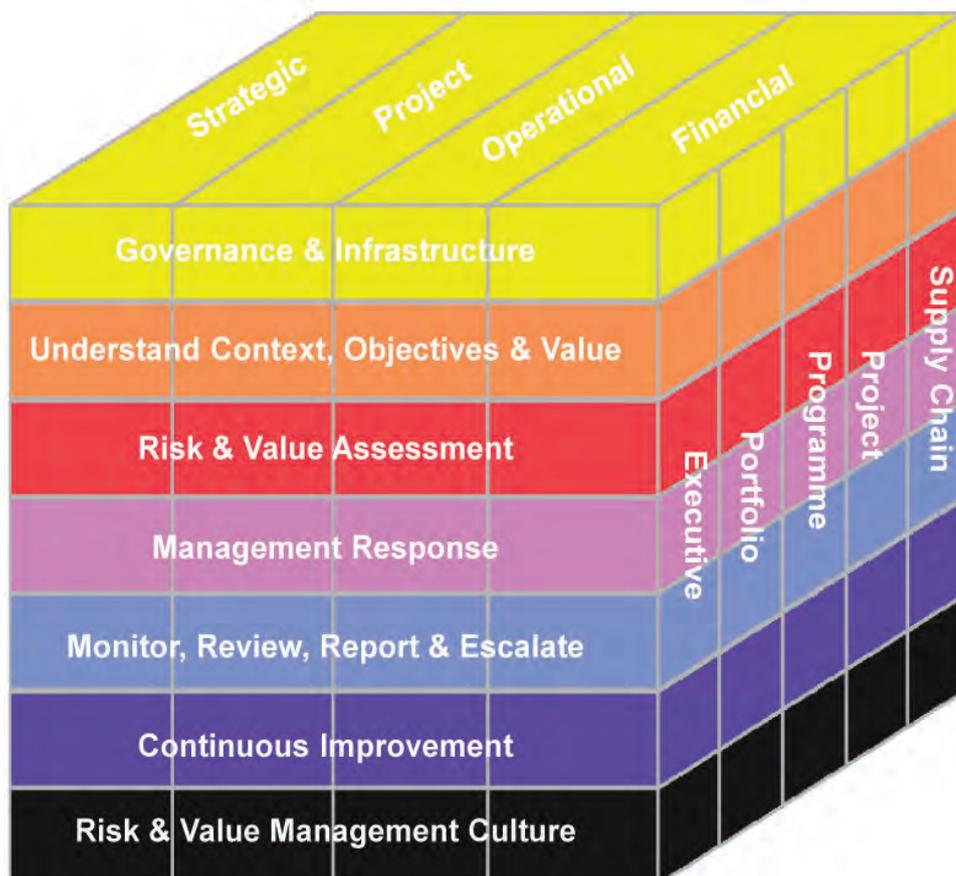
is predominantly assessed and managed by the supplier community or Network Rail, with minimal or no input from TOCs and FOCs. Whilst apportioning risk in theory creates accountability, the complicated nature of delivering projects in a railway environment means that no single party is able to achieve the best outcome for the end users of the railway.

## The Approach

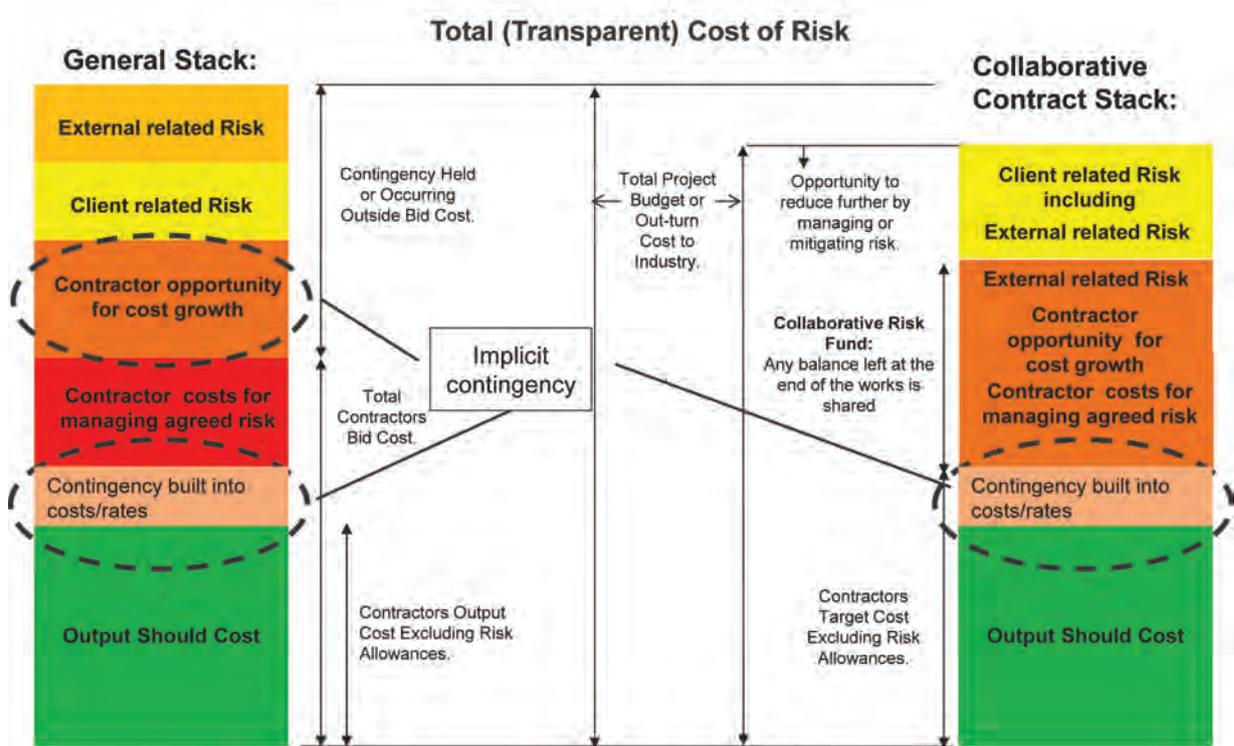
To address this, the APSCM Cost of Contingency work stream is developing a series of contract models to enable an industry wide contractual framework. This facilitates the implementation of an Enterprise Risk & Value Management framework that focuses on value creation and protection through proactive management of risk in a prioritised, effective, consistent and efficient manner. Through this collaborative Risk and Value Management framework the total (transparent) cost of risk can be understood, communicated and contingency more effectively managed to optimise utilisation.

## A comparison of key features of rail project contingency

- Contingency can be either explicit or implicit. Explicit contingency results from risks which are recognised, defined and modelled in a risk process. Implicit contingency is built into (hidden in) industry rate structures. Implicit contingency is based on previous experience, and built around the stigma of payment for changes in their various manifestations (scope, time, access etc) and ultimately the protection of profit.
- Collaborative contracting strategies promote shared risk identification and management, opposed to risk allocation. Explicit risks are managed through a collaborative risk provisioning fund and contractual provisions promote this to be mitigated or managed. The shared objective is to reduce contingency allowances by improving decisions made throughout the project lifecycle. The opportunities for sharing ideas and building on the ideas of others, maximises the opportunity for risk to be managed or value to be created.



*Risk & Value Management Framework*



- The transparency around collaborative contracting should result in contractor opportunity for cost growth being built into the collaborative risk fund (i.e. the no claims objective drives some of the implicit contingency to become explicit). As the Contractor is rewarded for accepting and managing risk there may be issues which traditionally would have been retained by the client (i.e. interface with other stakeholders) which the Contractor is happy to be managed by the collaboration.
- While there is still implicit contingency in the collaborative contract stack it is hoped that this will be significantly reduced over time. Such improvement results from cost being better understood (via the Rail Method of Measure, Unit Cost Modelling and shared commercial management), coupled with the supply chain becoming more trusting of the relationships and of the process. As this happens more of the contingency built into rate structures becomes explicit.

### Key enablers

RDG are developing a number of collaborative contract models that enables the risk and value management processes described above and encourages collaboration across the rail industry. This builds on measures already taken by the Department for Transport and the Office of the Rail Regulator to encourage broader integration across the industry. The plan is to develop a library of

Industry Integration Agreement Models that cover the development and delivery planning of railway projects. The outputs of these will inform the 'value for money statements' provided to the contractors that will deliver the design and construction works. RDG have developed an Alliance model which accommodates cross industry engagement. The Alliance model is based on the lessons learned from UK railway projects and is consistent with the best practice promoted by Infrastructure UK (Improving Infrastructure Delivery: Alliancing Best Practice in Infrastructure Delivery).

Each of the contract models will be supported by its own set of guidelines which promote the correct business processes and behaviours that are necessary for their successful development, negotiation and agreement.

The collaborative risk and value management framework and contract models are tools which define arrangements and process that if adopted, will reduce the cost of contingency. The broader challenge is developing a risk and value management culture across the rail industry. Early thought is to develop a community of practice in both physical and virtual form that allows industry members to share their stories of adoption. Through the process of sharing information and experiences, members will learn from each other and have an opportunity to build on what has been developed by others.

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## ***Silver service!***

Congratulations to the Institute of Collaborative Working (ICW) on its 25th anniversary, on behalf of EMCOR UK and the many other members who've also had the honour and pleasure to work for years alongside this ground breaking and remarkable organisation.

Twenty-five years is a landmark moment for any organisation, but arguably especially so for an institute, as it suggests the attainment of a certain maturity, competence, and stature in a chosen field. The ICW is truly exemplary in the achievement of all these attributes.

If this were a wedding anniversary, we would all be reaching for the silver gifts by now. But from everything I've ever known or experienced about ICW, it prefers the simple recognition of doing

an excellent job at getting organisations seriously to consider the benefits of adopting the collaborative approach.

What's more, from where I sit, there's growing evidence that this message is really beginning to cut through and reach a tipping point. At EMCOR UK we've recently been fortunate enough to be awarded some substantial new business from a broad range of organisations, and also secure important existing relationships. There are a number of reasons why this fortuitous situation has come about, to be sure. However, there is no doubt that dual commitments to supporting the collaboration agenda and consistently delivering on the principles enshrined in BS 11000 have been instrumental to this outcome.

As proof of this, I point to the fact that at least two of EMCOR UK's recent wins (both of which are major utilities) wanted to see concrete evidence – before the contracts were awarded – of how collaboration was working in practice with existing customers. Therefore, EMCOR UK is also much obliged to our long standing client BAE Systems, who has been a fellow pioneer on the collaborative journey, and for taking the time to show our potential customers how adopting this approach really does lead to the benefits we all espouse.

I know this uptake is being recorded by other members of the ICW, too, so the groundswell we've often talked about has certainly started to happen. That can only be good news for all involved.

I'm not sure that I will still be writing the foreword when the ICW celebrates its golden anniversary. But I do believe it's safe to predict that, by then, the principles it stands for will have become accepted business practice for many years and that its membership will have swelled accordingly.

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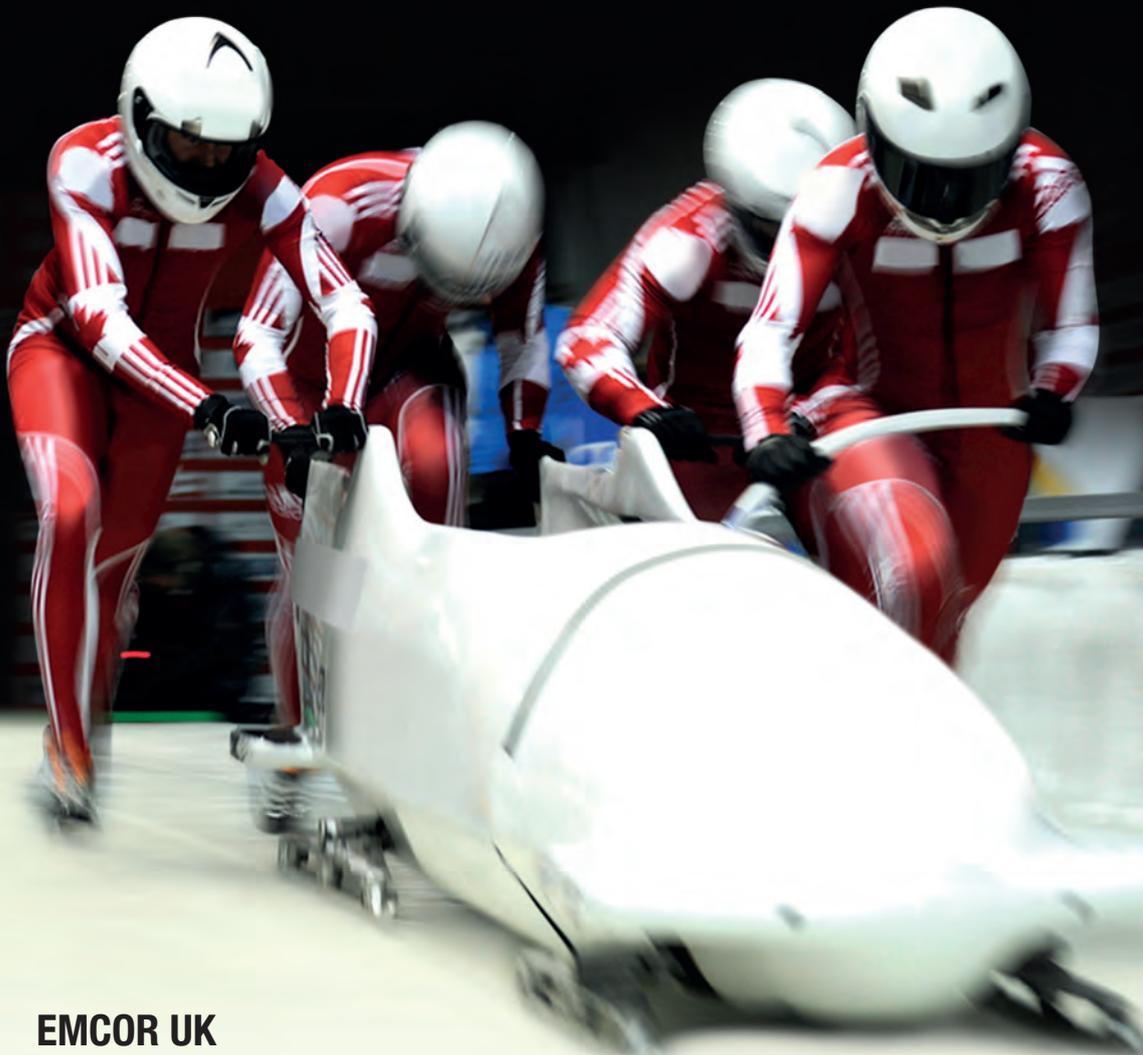
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# Get off to a good collaborative start by getting quantifiable

**Christopher Kehoe, EMCOR**

Donald Trump may not be everybody's cup of tea but there is no denying that he knows how to get things going. He famously said "Aim high and plan a take-off. Don't just sit on the runway and hope someone will come along and push the 'plane. It simply won't happen!"

Extending this analogy a little further: successful take off and achieving altitude early is fundamental to the success of any collaborative relationship. But none of this should be assumed or left to chance. It all comes down to the quality of the planning done at the start of the collaboration.

Getting organisations to collaborate to deliver shared goals can sometimes appear to be a huge challenge, especially where the management of one of the organizations may be accustomed to operating in a more 'traditional' way. Cultural barriers and initial scepticism will need to be identified and addressed, and the key to this is developing a sense of purpose that actively energises engagement on the core issues. In other words, collaboration needs to be identified with achieving quantifiable benefits quickly so that there's no room for sentiment. Our experience at EMCOR UK suggests that this focus on delivering hard edged goals achieves buy-in much more quickly than anything more philosophical in approach.

Trump's advice is to aim high so that those involved can be motivated and, thereby, achieve a challenge. Therefore, the first step is to set a mission framework that achieves strategic alignment between the participants. Experience has taught that it's important to get comprehensive involvement at an early stage of the mission development and that this process is seen as transparent, with subject matter experts getting involved early on to ensure that the mission is achievable. Without this technical and/or sector expertise, credibility in the process can quickly be lost.

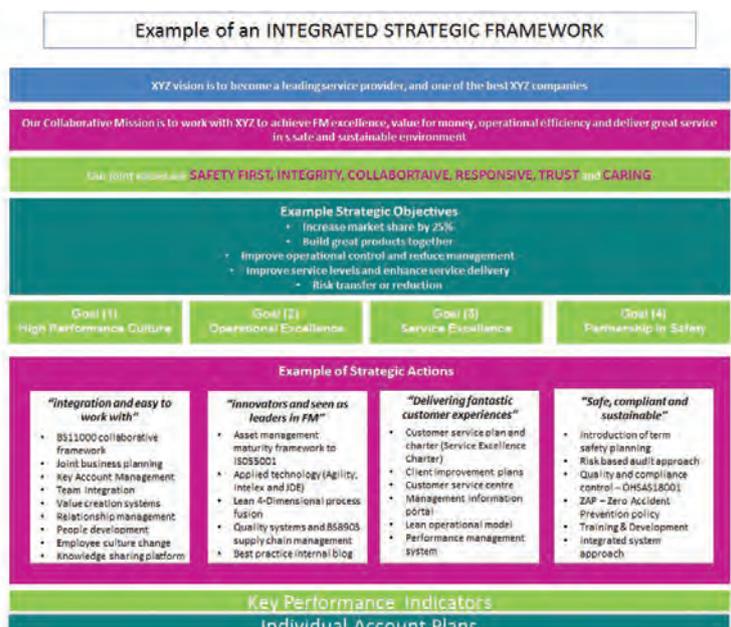
The objective of the mission framework is to co-create a rich picture to ensure

that the people working together within the collaboration are clear on purpose and are using the same lexicon to describe what they are trying to do. For example the mission could be "to ensure that production of a particularly important product remains in the UK." A goal such as this creates a number of supporting objectives which, in turn, will require specific joint behaviours to deliver throughout the supply chain. These elements became the basis of the Key Account Management (KAM) protocols.

In practical terms, this means that KAM goals are set for the collaboration; normally we set four, which are:

- 1) Design and implement a partnership for safety in the workplace
- 2) Create a joint high performance culture
- 3) Design solution excellence at every stage
- 4) Inculcate customer service excellence

EMCOR UK then sets strategic objectives, together with the client, to underpin each goal, to include outputs, targets, and responsibilities. Once this is done, we map out the value stream, and load all this information into our KAM planning tools. This becomes the blueprint for the collaboration. However, it is very much a live document that's constantly reviewed and shared. So the plan needs



to be published and become highly visible if it's to be effective.

Once the mission framework is agreed, it'll be necessary to cascade through the businesses. BS 11000 is an excellent reference point for this process, but the issues need to be bought to life and constantly reinvigorated to ensure there's a focus on results and everyone involved knows what is expected of them. This requires a clear commitment to good governance, which needs to be established from the outset.

An example deployment might look like the following:

- Joint management team
- Operational steering groups
- Service delivery review boards
- Weekly summary meetings
- Daily start up meetings
- Collaboration tool box talks

This approach means that problems tend to get solved more rapidly, because information gets to those who need it (at all levels) in order to fulfil their roles and the requisite performance data flows up and down in the same format. In this way, measurement really does lead to management, because EMCOR UK normally utilises master schedules to ensure the mission goals and objectives are being achieved. In practice this means tactical activities have joint ownership and value is added through the involvement of the subject matter expert, as described earlier. Furthermore, we utilise appropriate collaborative work platforms, such as team rooms, to ensure data and best practice are shared by all who need to have them. As a rule, our approach to information management is to make data available widely, unless there is a good reason not to do so. This approach enables delivery teams to take more responsibility for their work and decisions.

We extend this open approach to joint business planning which, as well as the combined objective setting I have described above, also includes key financial, commercial, and operational expectations and outputs. Critically, the business plan also identifies and shares key milestones which both parties in the collaboration agree upon. Therefore, the plan is entirely visible and the only way to deliver it is to ensure that a culture of openness rather than secrecy prevails.

All of this makes strategic and tactical sense, but unless it is delivered at the front line it's impossible to add the necessary value. Therefore, we actively encourage strategy to be formulated at the operational level, as this ensures the stimulation

of innovation that makes a practical difference to results. This frontline innovation needs to be factored in at the planning phase to ensure that partners appreciate the need to trial new ideas. Furthermore, there will inevitably be mistakes and failures arising from this approach and, therefore, a "no blame" culture must be implemented that does not require immediate sanction. This approach is underpinned by the use of Kaizen boards that encourage reporting, without fear of repercussion, so that improvements can be identified fast and effectively.

Therefore, the planning phase needs to identify how vision and content will be shared across those involved in the collaboration. The key here is to allow for the fact that collaboration needs to be constantly re-embedded at every level. A wide variety of channels exist for conducting this, ranging from webinars and information boards, through to tool box talks and information put up on YouTube. But one of the most effective ways we have found is to appoint "collaboration champions" whose role is to deliver the message on the ground and to create a consistent bridge between high level strategy and practical implementation. Leadership at the level of practical implementation is particularly highly prized.

For ultimate gains to be realised, this approach should be extended across the supply chain as well as the named parties in the collaboration. The key to these gains is building effective relations at every level.

At EMCOR UK we have learnt to measure our collaborative relationships on two key yardsticks: relationship maturity and KAM maturity. We further evaluate relationships between individuals and at a corporate level in the collaboration using 14 and 10 specific criteria, respectively. The results are reviewed and assessed through a key account steering board, established at the start of the collaboration, to ensure that actions are taken quickly and are based on empirical information.

Planning, with a focus on getting quantifiable goals and benefits, is the key to achieving and delivering collaboration, for the simple reason that many people at all levels within an organisation do not consider this to be the normal state of affairs and they need to be persuaded of its veracity and relevance. This doesn't happen by chance, which is why EMCOR UK fully believes that time spent on the planning stage of collaboration is critical, and never wasted . . . . provided it is applied in the right way!

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### **Realisation of benefits from collaborative working**

Ok so we have the certification and nice document framed on the wall, what now? Well of course this was not the reason for BAM seeking BS 11000 – rather it was a validation of the right way to work with our customers and supply chain in collaborative relationships.

2014 was a great year for our collaborative working with many of our major projects gaining recognition for the behaviours shown and results achieved by the whole team, for example at the highly commended Borders Rail scheme. But there is still room for improvement and the challenge moving forward is

surely to spread the use and benefits into the whole industry and where better to start than with the major customers delivering frameworks across all sectors around the UK.

BAM has frameworks with Network Rail, Highways Agency, Environment Agency and TfL in addition to working on significant infrastructure projects such as Crossrail and London Underground Station Upgrades. All these customers have in some form used collaborative processes to select and deliver their schemes, but the challenge is how do we maximise collaboration and realise the benefits?

With the significant workload to be delivered around the country over the next few years and the finite resources in the industry, not to do so would be a huge lost opportunity. In short the success of these schemes depends upon effective collaboration.

The prospect of value and benefits is of course attractive to everyone especially our customers, but the route to achieving these common goals varies and as an industry we must avoid committing the **7 deadly sins**, these being:

1. Selecting people only on technical and management competency – why not set collaborative behaviours as a key factor and ensure the supply chain buy into the process?
2. Choosing partners and suppliers only on price and expediency – the procurement process must consider the benefits of the selection of the right collaborative partner. Procurement teams cannot control the process, customers are buying people not widgets!
3. Maintaining adversarial reward systems – introduce the benefits of reward arrangements instead.
4. Leaving BIM only to the technology people – it's a tool that benefits us all.
5. Ignoring team building – this is not a 'nice to have' it's essential.
6. Keeping "your" people in "your" office – collocated teams work more efficiently and innovate
7. Leaving the relationships to the project teams – everyone is involved and plans have to be established at the earliest opportunity. We work better when we communicate.

Successful projects and frameworks are those which embrace the collaborative philosophy and we are working closely with our customers to help realise the undoubted benefits of such an approach. Early engagement enables us to understand customers' business drivers and goals but this needs to be a two way discussion and include supply chains as they represent the critical resources that can dictate the outcome of projects.

Thus commitment and buy-in from everyone to encourage both innovation and investment is paramount. This will foster innovation and best practice, working in the collaborative environment to drive continuous improvement. We have a real opportunity to make a real difference in the UK over the next few years – so let's not waste it!

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# Borders railway – our next step in collaborative behaviours

**Paul McCracken, BAM Nuttall**

## Continuing to challenge ourselves

BAM Nuttall has demonstrated its commitment to collaborative working by achieving company-wide certification to BS 11000. Whilst this formal recognition was a great milestone for us, we recognised that this wasn't enough. We wanted to use the framework of BS 11000 to change the way projects were delivered. Simply telling people we are collaborative is easy: the challenge lies in delivering on that promise. By setting ourselves bold targets, we knew we could develop a truly collaborative approach across every project we undertake.

## Collaboration in action

A good example of these principles and processes is our work at Borders Railway, the longest new domestic railway to be constructed in Britain for over 100 years.



*Constructing a bridge under the A720 required careful realignment of the busy route*

This iconic project is an outstanding example of collaboration, using the framework of BS 11000 with an aligned strategy tailored to the project objectives. With Network Rail also fully committed to collaborative working, we have been able to bring out the best in our relationship.

The project is funded by the Scottish Government, with contributions from Midlothian and Scottish Borders Council. It is critical for the economic and social revival of the region, and will reduce road congestion significantly.

The Borders Railway project comprises re-opening part of the former Waverley Line from Edinburgh to Tweedbank, with 50 km of new railway and seven stations, at a construction cost of £294 million. Under the Waverley Act, our integrated team is responsible for 600 parliamentary undertakings and obligations. Undertakings register tracks responsibility and assign action holders to each one. We jointly own this register with Network Rail, which equally distributes any project risks.

Our involvement at Borders Railway stretches back to 2008. Collaborative working needs to begin as soon as possible, so we started in the early stages of the ECI process. This took the form of a collaborative workshop with representatives from Network Rail, BAM and our designers.

From the original site investigation and feasibility design works, we are working as lead design and construction contractor, with Atkins, URS and Donaldson Associates undertaking design roles. Our construction partners from within the BAM Group, BAM Rail and BAM Contractors, bring European expertise to the scheme. Their use of alternative methods and strategies has been beneficial to the scheme, adding value and specialist skills. In turn, this knowledge has been shared with our delivery partners.

The scheme has an accelerated, tightly integrated programme, scheduled for completion in July 2015. To allow for the commissioning phase of the new line, we are currently planning handover to the Train Operating Companies.

## Collaborative process and charter

The scheme passes through many communities and populated areas, with over 25,000 line-side neighbours. To deliver our customer's aspiration to have a live operating railway in record time, we introduced an integrated programme management approach. This helped us to manage the complexity of multiple worksites along the route, with over 1,000 personnel.

At the early collaborative workshop, our team identified the desired collaborative environment



*Our fully integrated team has been directly responsible for the success of the project*

and developed a charter. The **Borders Railway Collaborative Behavioural Charter** was subsequently agreed between us and Network Rail.

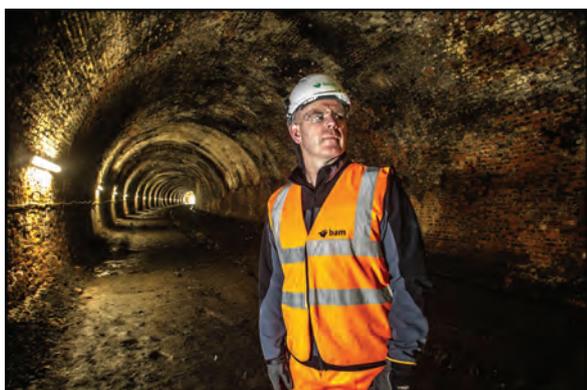
The Charter established our primary objective: that the partners agree to *'combine their respective railway engineering, management skills and resources to successfully manage and perform all the works in a spirit of collaboration'*.

We developed ten principles within the Charter, all of which were designed to support this objective:

1. Openness, honesty and trust
2. Challenge and support
3. Generous listening and understanding
4. Relevant communication
5. Improvement
6. Fair and reasonable
7. Decision making
8. Open book philosophy
9. Commitment and common approach
10. Individual improvement

## A sustainable, one-team approach

Our Charter established the behaviours that have enabled all project delivery teams to integrate.



*Restoration work to the Bowshank Tunnel demanded a co-ordinated approach*

We are working to shared objectives, with clear ownership and accountability and joint governance processes.

This method of working puts the project first, so has enabled a joint problem / joint solution approach that functions above the needs of individual organisations. As with any project, challenges still exist, but these are overcome through open and honest working. The shared level of risk and responsibility has led to a no-blame culture, which has also brought about increased support from across the delivery teams.

## Sustaining the culture

To ensure the Charter remains live, a number of follow-up workshops have been delivered. In keeping with our desire to challenge and inspire new discussions and ideas, our Leadership Team regularly reviews and monitors the effectiveness of the Charter. External facilitators lead the twelve-month review.

## Borders Railway Contract Steering Group

Our Contract Steering Group includes personnel from Network Rail, BAM, subcontractors, designers and stakeholders. It provides strong, visible leadership and an additional focus for embedding collaborative behaviours and practices across the project. This includes supporting stakeholder inclusion, providing a key decision-making forum and promoting continual improvement.

## Accommodating customer and stakeholder needs

The original approved route left a group of houses isolated between the new railway and the existing A7, with access severed by the new railway. Alternative routes were suggested; however we identified a third solution and undertook a range of joint forums with residents, stakeholders and our designers. With residents aware of all the factors affecting the solution, we were able to present a revised design that satisfied all the constraints.

Any concerns and issues were incorporated into the overall scheme, and this process continues to be triumph for customer focus. The residents received enhanced access to their homes, are undisturbed by traffic noise and do not suffer increased light pollution at night. In the long term, reduced traffic congestion will benefit road users as more people start to use the new trains. Network Rail and Scottish Borders Council benefited because the need for two large elevated roundabouts and a

bridge to cross the railway was removed, which had considerable cost and time benefits, in excess of £1 million. Our revisions also removed 12,500 lorry movements to construct works, thus providing a benefit to the environment and the community.

### Working with our Supply Chain Partners

To deliver Borders Railway, we have utilised our BAM Group companies across Europe, together with our in-house capabilities in the UK. This includes integrating our suppliers and employing local resources.

The selection and assessment of our suppliers at Borders Railway is led by our dedicated Procurement Manager. This ensures that the assessment, verification and audit processes are undertaken during the selection process, which includes collaborative engagement processes.

We developed the project recruitment strategy to guarantee that opportunities were provided to local businesses and locally-based personnel wherever possible, including our suppliers.

We hosted a Meet the Buyer event to encourage local companies from across Edinburgh, Midlothian and the Scottish Borders to register as suppliers.

Our regional buying team registered 250 companies, and over 450 local businesses have provided products or services to the project. For example, the restoration of the historic Lothianbridge viaduct was carried out by Forth Stone, based in Bonnyrigg, around two miles away. They led all masonry repair and re-pointing works. At peak, we employed 234 local people.

### Effective community engagement

Interfaces with landowners and stakeholders have been vital to our success. Our Communications team provides the main contact for the public and stakeholders. They have developed relationships with the various communities, who feel they are able to communicate easily with our team.

We established a dedicated project information line, email address, website and social media site to enable direct contact between the project delivery team and the community. Information points have been set up in local community buildings to improve communication with non-digital customers.

The Communications team regularly attend Community Council meetings, residents associations, business groups and schools to keep them informed and answer any questions or queries they may have.

We also established a Community Fund, which has benefited over 40 local groups. This helps support youth community activities and safety initiatives close to the new railway.

### Safety Communications Group

The Safety Communications Group was set up between BAM, Network Rail, local councils, emergency services and the British Transport Police. They co-ordinate the promotion of construction, railway and community safety through monthly meetings. Local councils are also able to address issues from the public communicated directly to them through these forums, which allows for collaborative solutions.



*The whole project has been based on a one-team mentality*

### Setting new standards in collaboration

The Borders Railway scheme has reset our view of exemplar standard for collaborative working environment.

As we approach the end of the project, it is clear that this level of success would not have been possible unless everyone dedicated themselves to the whole process. We have had complete team integration, including from our European partners, who can take the knowledge and practices gained here and transfer them to the whole of our group.

The challenges have been considerable, but we remain convinced, as do our customer, supply chain and stakeholders, that the success of this project is as a result of the fully collaborative team.

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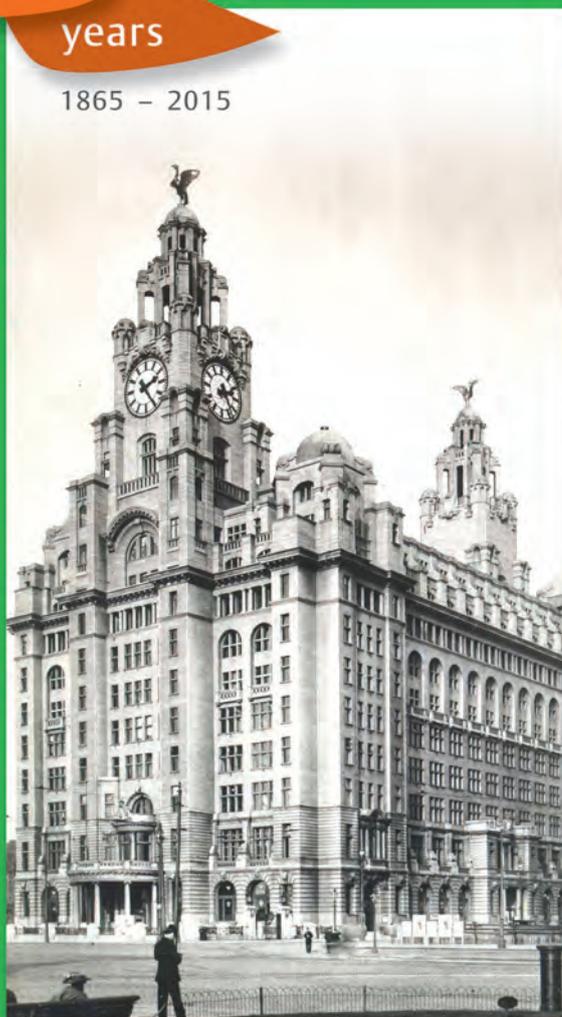
years

1865 – 2015

## 150 Years of Successful Infrastructure Delivery

BAM Nuttall has been shaping the modern infrastructure throughout the UK for the past 150 years. The company was founded in 1865 by James Nuttall, who was a pavior from modest surroundings in Salford. This family owned business was involved in many exciting schemes including the construction of the iconic Liver Building in Liverpool, the Mersey Tunnel, the Tyne Tunnel and the production of the innovative Mulberry Harbours, which were used during the D-Day landings in Normandy during World War Two.

Today the company still carries that same entrepreneurial spirit and has established a reputation for innovative civil engineering. Recent examples of this are the regeneration at Queen Elizabeth Olympic Park, the refurbishment of the north bound bore of the Blackwall Tunnel and the regeneration of Kings Cross.



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BAM Nuttall Limited is an operating company of the European construction group Royal BAM

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# Our concept for Collaborative Success



**Tim Mowat, Selex**



In Selex we have long believed that working collaboratively is the key to our future success as a business. True and effective collaboration has its foundation firmly set on the sharing of skills, experience and knowledge in order to devise the very best solutions as to how outputs – whether products or services – are delivered. It's all about having a genuine and honest approach to collaboration – and the best ideas stem from an environment of openness and trust, underpinned by a culture of excellent communications in which ideas can be freely discussed and exchanged. This way enhanced value is continuously added to the products and services we deliver.

We strive to apply the principles of good collaboration to everything we do in Selex. Being part of the Institute for Collaborative Working (ICW) has done much to facilitate and support our approach to collaboration and has helped us to define our strategy and improve the processes and procedures which underpin it. Key to this has been the formalised approach to successful collaboration defined in BS 11000. It is one thing to believe in collaboration and good communications but quite another effectively to implement this. BS 11000 has provided a framework which has helped us to translate our aspirations to work collaboratively. It has helped to clarify and define our approach and our most recent external BS 11000 assessment cited "The findings of the assessment have demonstrated over the course of the last 3 years that the company has embraced the principles of the framework and manage the requirements laid down within BS 11000-1:2010 as business as usual". Praise indeed and confirms that our efforts are becoming embedded within everything we do. Understanding and implementing the standard has provided us the wherewithal to develop a sound and comprehensive approach to relationship management which sets out the how, when and

where of successful collaboration across a number of key and very complex programmes.

We deploy our breadth of collaborative knowledge and expertise from other programmes to ensure we deliver customer expectations by striving for high performance, focusing on what's best for the programme, embracing transparency and objectivity, driving continuous improvement and evolution and by recognising inclusivity as central to our collective success. Our formalised but flexible approach ensures that we drive successful partnering engagements across complex supplier and client landscapes, even when we have no direct contractual relationships in place.

Alongside their competitive procurement approach, public bodies are increasingly looking to suppliers to propose contractual models that will yield enhanced value for money for complex programmes. This requires industry to be prepared to adopt innovative and sometimes complex commercial mechanisms in order to meet such client expectations, but such innovative approaches cannot always be readily distilled into a single (or simple!) contractual agreement.

In a number of cases Selex has raised the bar in delivering against such complex collaborative expectations. For example we manage an



FOUNDATION MEMBERS

innovative and demanding programme on behalf of the Home Office that requires us to sustain a truly collaborative partnership in order to ensure all parties are involved and operating collaboratively. This consortium comprises over 90 industry, academia, SMEs (including micro SMEs), and supports an array of stakeholders from across the emergency services sector in delivering evidence based, objective options to underpin the delivery of their strategic goals, and financial and operational efficiencies. We have a relationship management plan that underpins the required approach that is further supported by Partnering and Confidentiality Agreements signed by all parties. This approach has enabled us to establish a truly open and collaborative environment necessary to meet client needs whilst simultaneously recognising and accommodating the very different needs that such an eclectic mix of companies will inevitably involve.

Further, one of our latest programmes benefitting from an innovative collaborative approach involves a complex client requirement that is broadly broken down into two elements. Each element is contractually managed via a separate contract with two separate suppliers (Selex and a second supplier). Selex is responsible for the management only and not the liability of the second supplier, should the second supplier default under their contract with the client. An operations level agreement (OLA) between Selex and the second supplier defines the roles and responsibilities with the collateral warranty covering of the second supplier warranting to the client that it will comply with the OLA with Selex. Such an



innovative approach requires the commitment of all parties to the open and collaborative approach; success however can only be guaranteed through knowledgeable management of the collaborative approach by Selex.



*Left to right: Dave Hawkins, Peter Martin and Dr Paul Connor taken at the Collaborative Leader Module at Warwick University*

We are very excited by, and fully support, the transition of BS 11000 to an international standard – ISO 11000. This is a great achievement for the Institute and a significant step forward for business. With our industrial and commercial global footprint we very much welcome the spread of the collaborative message world-wide and will embrace the transition with vigour.

A vital component of successful collaboration is for organisations to have staff with a thorough understanding of what it is all about – and also the appropriate skills successfully to manage the process. This is particularly important at our executive level as without strong support and ongoing commitment at the highest level a collaborative approach to working simply will not work. We in Selex are very pleased to observe that the development of these skills is now a key objective of the Institute and that they are already collaborating with various academic organisations with the aim of providing appropriate training and development at both under and post-graduate levels

Selex is proud to be a Foundation Member of an Institute which has not just promoted the collaborative message for a quarter of a century – but has produced a very effective methodology to help organisations to DO it !!

Happy Anniversary ICW! Selex are happy to accompany you on your ongoing journey.

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## *Listen, create and deliver!*



# CAPITA

***Dawn Marriott-Sims, Capita***

Benjamin Disraeli once said that the greatest good you can do another is not just share your riches, but to reveal to him his own. I think that embodies what true business collaboration is all about. And certainly the partnerships with which Capita are involved, in central and local government and in the private sector, have that understanding at their core – that by working with our clients we help them reveal their riches – whether that wealth is happier, more loyal customers; reduced costs; more efficient processes; or all of these things.

In order to forge such partnerships and to make them enduring and able to continue to deliver benefits to both partners for years (even decades) Capita does three things: listens, creates and delivers.

Listening is the most important part but perhaps the hardest to get right. Listening means really understanding what your client – and their customers – want, and why. Listening means embracing the values of often radically different organisations and living them day by day. Listening also means challenging preconceptions. Real business transformation needs to lead to desired, quantifiable and beneficial outcomes but how you get to those outcomes – happy customers or citizens, 'sticky' revenues, less waste – doesn't have to rely on the way these things have always been done. A real partner will have ideas for better ways of doing things. In our recruitment partnership with the Army, for example, we have challenged some of the barriers to recruitment and change has been embraced.

Creating those ways – based, ideally, on solid data and approaches that are properly tested and evidence based – is the next stage in building a genuine collaboration. Capita has invested heavily in customer insight and analytics, and with hundreds of clients across virtually every industry sector, is able regularly to test its assumptions, creating solutions that are efficient but also effective. An example of that is a new web portal we have designed for citizens of one of our local authority clients. It was designed not only by working in partnership with the local authority themselves but by a number of the people – citizens – who would be using it, to ensure that it genuinely met their needs.

Finally, a partner will deliver against measurable objectives, agreed and sustainable but flexible enough to react to the changing landscape of business; to policy changes; economic down (and up) turns; to changing customer behaviour and demographics and even the unforeseen. In the much battered life and pensions industry, for example, we're working hard to help a number of our clients use digital technology, which is becoming more and more important for customers but which this sector has struggled to embrace independently.

It is by listening, creating and delivering that Capita is helping to reveal its partners' 'wealth' as well as its own.

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# The Defence Infrastructure Organisation – a new collaborative working programme



**Tim Seabrook, Capita**

## The story of the DIO

The DIO is an operating arm of the MOD and plays a vital role in supporting our Armed Forces by building, maintaining and delivering what the men and women who serve our country need to live, work, train and deploy on operations both in the UK and overseas. This can be either directly through, for example, the training estate that prepares military personnel for action, or indirectly through the housing environment that supports their families.

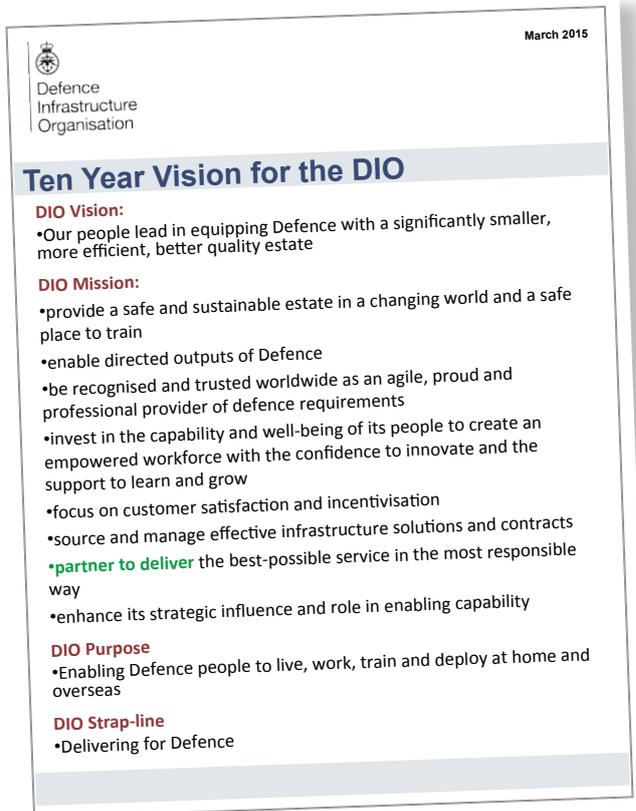
The DIO was established in April 2011 following the 2010 Strategic Defence Review by Lord Levene and in its constituent parts, has a complex historical and political background. His recommendations led to Defence being reformed to be more efficient and effective. As one of the Core Defence functions, the DIO brought the management of Defence Infrastructure together under a single organisation, now led for the first time by a new **strategic business partner**.

## A new era

In June 2014, Capita (working with URS and PA Consulting) was appointed as the DIO's strategic business partner (SBP) to lead and manage the organisation for a 10 year term. Mobilised over a 3 month period, a new hybrid leadership team was appointed in preparation for the September 2014 in service date. An Infrastructure Implementation plan, which is updated each year (and now complemented with a new business plan), sets out how the SBP will manage the DIO to deliver its outputs and create a right sized, lower cost, better estate.

DIO's long-term aim is to deliver infrastructure to Defence in the most effective, efficient and sustainable way better to meet the needs of military personnel. Its responsibilities include:

- total facilities management: both 'hard' (eg. maintaining property) and 'soft' (eg. security, cleaning, catering and grounds maintenance);



- delivering infrastructure projects;
- managing utilities, including energy, water and waste water;
- managing the estate; and
- working with Top Level Budget (TLB) customers to develop their infrastructure needs into an affordable infrastructure programme

Permanent Secretary Jon Thompson said:

*"This is a huge step forward in the MOD transformation agenda. Lord Levene recognised the need for efficient, effective and professional delivery of enabling services, including the injection of new professional skills and expertise, and the strategic business partner should make a significant contribution towards achieving that."*

## Nine months in..

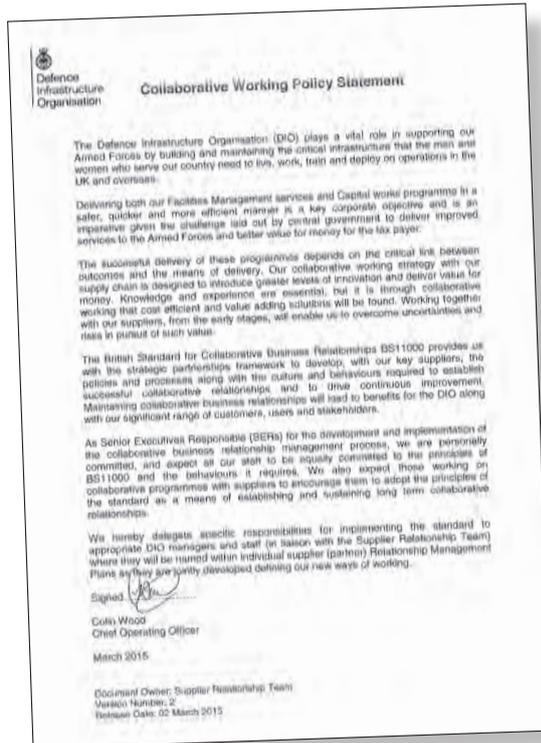
Amongst a large array of transformational activity already underway, there has been a very specific focus in socialising the principles of BS 11000 across the organisation. Work is being undertaken with our internal departments and portfolio managers to lay the foundations for a new Collaborative Working programme, including working with colleagues to develop a new holistic strategy for supplier relationship management. That said, the MOD were an early adopter of PAS11000 and have received BS 11000 certification on a number of significant partnering programmes to date. This has supported the journey in no small part as most are familiar with the concept of partnering within the DIO, although maturity levels vary due to some of the legacy budget constraints and previous re-organisation.

Mike Rogers from the MOD's Partner Support Group said "the Group has worked across a range of the MOD Partnering projects and programmes to establish the principles of BS 11000 by gaining evidence of best practice and working towards certification."

The DIO is essentially a procurement organisation with an annual budget of £3.3bn, holding considerable responsibility for both day-to-day service delivery and capital programmes discharged via its supply chain partners. Collectively, becoming the 'intelligent client' with BS 11000 as the common platform is crucial to successful delivery over the next 10 years and beyond.

The response to date has been truly positive: people can see the tangible benefits of BS 11000 as a platform for our 'Collaborative Working

Programme' and support the idea of 'extended enterprise' in working together more closely to deliver mutually beneficial outcomes. The DIO's senior leadership team have sponsored this approach and see significant opportunities for improving supply chain relationships and developing new ways of working to enhance service delivery, innovation, value engineering and joint risk management, with a new Policy statement having been signed by our Chief Operating Officer.

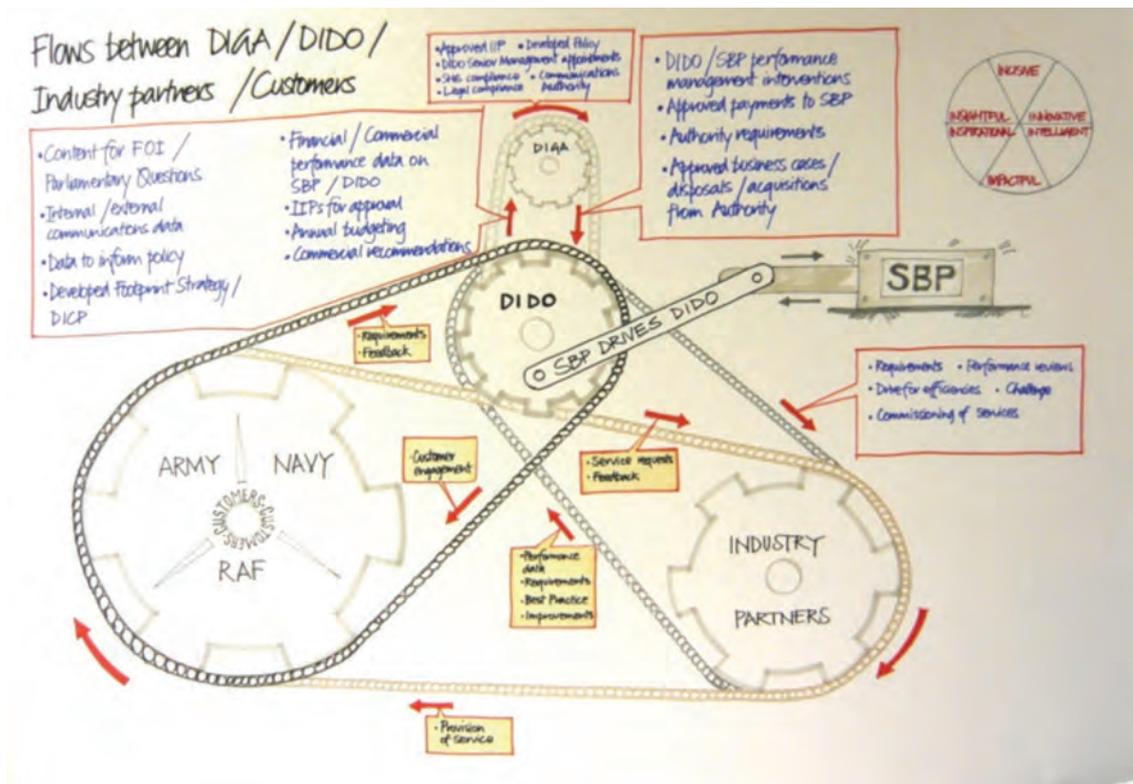


The diagram overleaf (which will appeal to my fellow engineers amongst you) demonstrates the significance of our Industry Partners working closely with the DIO and the 'gearing and synergising' activities of the SBP in enabling and sequencing capability to align the business outcomes with the needs of our users of the MOD estate.

## A personal perspective

A number of reports in the public sector transformation space cite that leadership is the main critical success factor in successful collaborative transformation. This forms part of the success, but not in isolation, of empowering individuals to play their part too. On our journey so far, I have found the following are crucial to success in establishing meaningful engagement:

1. Getting all the right people in the room (hold joint workshops with ground rules set in advance).



Improving Integration – DIO (referenced as DIDO in diagram) working with Industry Partners to deliver more efficient and effective services for the Armed Forces.

2. Keeping the initial focus on joint problem solving (a structured agenda with good independent facilitation)
3. Not being afraid of conflict (be open, honest & respectful of each other and get the real issues out on the table)
4. Being inclusive: everyone has an equally important voice and should have the opportunity to contribute (collaborative Intelligence [CQ] is as important as EQ + IQ)

Great leadership skills in isolation are not the answer to collaborative delivery. The value in 'doing the right thing' runs across business relationships at a multitude of levels and this is where relationship management plans (RMP's) come into play – once the wider stakeholder community is properly understood.

Asking a leader, regardless of their level within the business, to share control and to trust their new partners to deliver is almost certainly asking them to take an unreasonable leap of faith. Collaborative leadership skills need to be built alongside new governance and shared decision-making arrangements., And this, of course, needs to be supported by joint access to the systems and data, which will enable leaders easily to monitor their collective performance. By building collaborative skills, governance, and systems together, leaders

learn to place their trust in new relationships that are built on strong and jointly owned foundations.

Dawn Marriott-Sims (Joint COO of Capita PLC) in her article in last year's 'The Partner' (*Talk to me – How do you create genuine business dialogue?*) referred to the impact of five core behaviours in generating dialogue (Genuine Communication, Testing Assumptions and Interfaces, Focusing on Interests not Positions, Agreeing Ways of Working and Discussing Undiscussibles) all of which hold very true in the above-described context.

For me, in any collaborative working arrangement, it's the vision, values and behaviours which provide a robust platform for probable success. Without these, it is a rocky and risky road ahead and one likely to be unsustainable moving towards the long term, where trusted relationships are vital.

One final thought: a recent senior level workshop which I attended derived trust, interestingly, as follows:

$$\text{TRUST} = \frac{\text{Credibility (Honesty)} \times \text{Integrity (Consistency)}}{\text{RISK}}$$

**Perhaps we can all learn something from this?**

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# CAPITA



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Find out how a BS 11000 inspired partnership could transform your resourcing operation. Call Steve O'Neil, Sales Director on 07775 524415 or email [steve.o'neil@capita.co.uk](mailto:steve.o'neil@capita.co.uk)

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## **Understanding BS 11000 and its benefits**

Another year has passed and we all continue to gain a better understanding and insight in the application of BS 11000 in many different scenarios.

Costain's 'Engineering Tomorrow' strategy is about identifying, developing and implementing innovative solutions to meet the UK's major infrastructure needs. We are committed to meeting our customers' needs by working in collaboration with them (and other key stakeholders) to deliver our promises and to support the development of broader services and technology.

In Costain we are committed to operating our business both sustainably and responsibly. We are focused on one simple but powerful message – 'Costain Cares'. This is not a slogan: it is an attitude of mind. It is integral to everything we do and a touchstone

against which we can evaluate and measure our performance. We care about all our stakeholders and encourage open, honest and respectful communication and therefore believe in strong, long-lasting collaborative relationships that are mutually beneficial to all parties involved.

We have continued to see a rise in interest in BS 11000 across the different sectors in which we operate, and our supply chain are wanting to understand it better and realise the benefits. Our 'BS 11000 relationships' are moving away from being project focused to being more strategic and delivering a series of projects in different locations. As we continue to increase the number of these relationships, it has necessitated a widening of knowledge and competence across the company, including providing awareness training to supply chain partners of the benefits that can be achieved.

There is still a lot of misunderstanding. I am often contacted by other organisations wanting to know more about BS 11000, many have made it far more complicated than it need be, or have not understood the basic principles upon which it is based, or have mis-understood the certification process for relationships. With the introduction of the new high level structure for all management standards it makes it far more practical to have an integrated management system with risk at its core to protect the business. Frequently we are finding that people are not considering the risks of collaboration (of which there may be many) and are more pre-occupied by operational and project risk.

The Costain relationship with 4Way is an excellent example of how tangible benefits can be gained from working collaboratively, which has been achieved by understanding one another and establishing the right behaviours on which to build trust, from which many opportunities for improvement have been developed. The use of Strategic Awareness tools was a great starting point that enabled the combined team to explore and identify the strategic objectives of the relationship across several potential projects. Through embracing BS 11000 this collaborative relationship has delivered improvement solutions with significant cost savings that also deliver maximum benefits to road user safety, journey reliability and informed drivers.

Since last year's edition of the Partner I am very pleased to be able to report that one of our BS 11000 relationships with Alstom and Babcock has progressed so well that it has now become an incorporated joint venture, ABC Electrification Limited, and is now establishing its own collaborative relationships with other organisations as it delivers over £1 billion value of rail electrification works right across the UK.

But collaboration alone is just an enabler for added value. Collaboration and trust can bring about the environment in which innovation, lean, BIM, and other improvements can flourish, bringing about added benefits for all.

[Tony.blanch@costain.com](mailto:Tony.blanch@costain.com)



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## Partnering in Babcock – one year on



**Tim Redfern, Babcock**

Partnering and collaboration underpin much of what Babcock International Group does. We seek to win (and retain) long term contracts with all our customers, not least the UK Ministry of Defence, and then develop a mutually beneficial relationship with that customer to deliver outcomes that exceed those demanded in any contract document. Sounds simple, right?

In the last 12 months, we have gained BS 11000 certification in our long term (30 year) contract with the Royal Engineers and we intend to roll that out across the rest of that contract organisation and other MOD / Defence contracts and ultimately across the Babcock International Group Defence and Security Division. I would however reflect that there are a number of challenges (or opportunities – depending on your perspective) that need to be in place to make true partnering a reality that adds genuine value.

An obvious statement perhaps, however there has to be a clear understanding of who we intend to partner with. Where there are multiple touch points and customer interfaces, there must be a clear stakeholder management plan and identification of how and who we need to work with differently to deliver superior outcomes. As a precursor activity, I would suggest that collaboration and long term shared working is enshrined in a joint plan or vision statement which sets out the long term hopes and desires for the joint organisation.

Secondly, there needs to be mechanisms in place that will facilitate partnering and collaboration. By its very nature, collaboration is about sharing information to gain joint advantage. The governance of a contract, structure of the management teams and information architecture need to support that sharing culture. Through the lens of a public sector / private sector contractual relationship, partnering is not an excuse for an easy ride or for relief against poor performance by the service provider. Good contractual governance should support both strong performance management and a culture where that performance is enhanced through joint long term planning, sharing of issues early and constructive dialogue focussed on early resolution where necessary. Organisational design has a key part to play in all of this. The simple collocation of joint management teams and the creation of joint project teams from the constituent tribes sends a very powerful message about “jointery” and sharing. Whilst there is often an instinctive aversion to the sharing of information, the creation of well managed and mutually accessible data repositories, such as SharePoint sites or document management tools (with mandated business processes and work flows to support their use) all contribute to a sharing culture. There also needs to be a plan – a framework that underpins joint activity managed as a project with clearly defined milestones and benefits.

Finally, I would reflect that there needs to be a level of competence in the enterprise around collaboration and this is sometimes not the case. Our teams clearly need to be bought into the behavioural / cultural element which is around why we should partner. However without the training and tools to enable to work in this new way, we are a doomed to failure. Whilst not a shameless apologist for the work of the Institute of Collaborative Working, one route to collaborative smarts is through the training courses that are run by the Institute that we have used and will continue to support in the months to come.

To wrap up, there is a mix of soft issues (behaviour, culture, leadership, vision, qualification) that need to be considered when seeking to effect collaborative working and these must be supported by some harder measures (relevant governance, IS / IT, programme) and both strands need to be developed in parallel. A collaborative culture chimes with organisations such as Babcock and we will continue to embed this sharing culture in our current and future contractual relationships. I do believe however that for us, and perhaps for many other organisations, the achievement of BS 11000 underwritten by the Institute for Collaborative Working, is not the end of the partnering journey but the start.

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## ***Building great collaborative relationships into the future***

Atkins as an organisation has reinvented itself a number of times over the years. Not only do we want to remain fresh, exciting and challenging for our staff but it is vital that we continue to get to know our clients better, understand their needs and provide them with the best solutions.

Currently Atkins' UK business is going through a transformational change that will see six business units turned into four, larger, divisions. The Rail and Highways & Transportation businesses will be merged into a 3,000 strong Transportation division. The Management Consultants and Defence, Aerospace and Communications business will also be combined. All our divisions are moving to a fully embedded matrix style organisational

model. These changes will make our region more agile and able to meet our clients' future needs and requirements. To do this, collaboration across Atkins, with our clients, partners and our supply chain is key.

So far the transition is going well: moving staff into the right part of the business, ensuring budgets are in place and making sure systems work effectively are straightforward tasks. The challenging work starts now as we develop and build our new 'social system' – the values, beliefs and behaviours that will ensure the development and sustainability of great collaborative relationships now and in the future. This is based around four key themes:

- Client centricity – focusing on attractive markets and building broader client relationships.
- Improved innovation and knowledge exchange – sharing and building additional value with our clients.
- Strategic resourcing – getting the right people onto client work irrespective of location.
- Active management of revenue streams – securing more of the work we want to win, delivering it better and pursuing larger, more complex and margin rich projects.

All of this is built on great relationships which in turn are only successful if we work hard at developing, sustaining and growing them. This means changing the way we behave, adapting the way we work and embedding collaborative competences, values and behaviours in everything we do.

It all sounds easy – just do it! However, sometimes the hardest thing to change is staff's behaviour. People get used to working a certain way and suddenly to ask them to change is a challenge. To address this we are giving staff regular updates to explain why the changes are so important as well as providing examples of where different behaviours have resulted in a dramatic improvement in results. Other factors, such as making it easier to share knowledge and information and ensuring that all our leaders behave collaboratively, are critical to this transition and this is just the starting point.

Transformational changes across any organisation are not done overnight but we are building on a solid foundation, having begun our BS 11000 journey four years ago. Our vision is that in the Atkins of the future, our approach to collaborative working will be embedded within our processes and the way we work and that we will all be aware of the value that collaborative working can bring to our organisation. Over the coming months our stakeholders will start to see a fundamental change in the way we operate as we strive to understand and work collaboratively with our clients, partners and supply chain. This will enable us to do the work we want to do, provide our staff with interesting projects and help us to innovate and grow alongside our clients – whilst keeping the Board and our shareholders happy. Watch this space!

# Working in partnership delivers exceptional results

We think that collaboration starts with being open:  
with our clients, to sharing ideas, to new ways of doing things.

ATKINS



STAFFORDSHIRE  
ALLIANCE 

Staffordshire Alliance delivery partner



BS 11000 certification

[www.atkinsglobal.com](http://www.atkinsglobal.com)



## **Clear communication = great collaboration!**

How quickly time moves – It felt like yesterday that I ‘penned’ an article for the 2014 edition of The Partner publication. That year has seen even more emphasis from Lockheed Martin UK on ensuring we work to have the right collaborative relationships in place whilst conducting ourselves consistently and demonstrating the values and behaviours our organisation always aspires to uphold.

As I reflect on the past year, our successes and challenges have always been underpinned by the need to engender relationships that support delivering what our customers require. Of course we strive to do this through flawless performance, but we are acutely aware that without strong relationships across all our activities, we’d be setting ourselves up for failure.

## **2014 Updates**

We continued to grow at a significant rate in 2014, new contracts with both existing and new customers and further growth through acquisition all contributing to a hugely successful year. This also saw us focus on evolving our collaborative relationships further still and, with the commitment of our Senior Leadership Team, a core Collaborative Working Group was formed. The Collaborative Working Group quickly established guiding principles and business rhythm with a responsibility for embedding our desired relationship behaviours into our culture and raising the knowledge and benefits across our workforce. This was only possible with the total commitment of our leaders and their unwavering support.

How have we achieved this? It is an ongoing activity, but communicating the vision is key and internal media channels vary from Intranet news articles to updating employees directly through flowed down communications at employee and all-hands meetings, to regular updates on Eureka Streams (our internal Twitter type feed) – this coming from a social media philistine!



We also raised the profile to our employees by including the awareness in our annual performance cycle, again flowing down this commitment from the leadership within our organisation.

One of our major contract wins in 2014 saw us provide a full-time relationship manager, Malik Usmah Haleem as part of our approach to managing the programme. The role provided additional collaborative and partnering focus, essentially from day one of the contract. Usmah is also a welcome member of our Collaborative Working Group and was pleased to compose an article on her role as a relationship manager for this edition of ‘The Partner’.

## **Closing Thoughts**

I had the honour of recently delivering an industry presentation at The University of Warwick, as part of an MSc pilot module in Collaborative Leadership. The insightful questions from the audience were focussed as much on what we need to do to keep moving forward, as well as what we had learned on this journey to date. The enthusiasm and perspectives of the class strongly emphasized that working in a collaborative environment where all parties can prosper, does not just happen by chance, it takes determination and strength of leadership to ensure all parties feel valued and successful in the relationship.

Finally, on behalf of Lockheed Martin UK, I would like to congratulate the Institute for Collaborative Working on its achievements in reaching their 25th anniversary – WELL DONE!

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# An evolving, collaboration journey...

## Usi Haleem, Lockheed Martin

*'It is the long history of humankind (and animal kind, too) those who learned to collaborate and improvise most effectively have prevailed'*  
 Charles Darwin

Collaboration through team work is essential for many of Lockheed Martin's customers – irrespective of the area in which they work – as it enables the delivery of critical products and services.

As a Business Relationship Manager within Lockheed Martin UK, I work with multiple organisations of varying sizes and expertise and recognise the importance of collaboration. I, like colleagues across the organisation, understand we need more than well-defined contractual constructs to establish effective collaborative working relationships.

Many of Lockheed Martin's business processes complement the BS 11000 Collaborative Business Relationships framework:

- Full Spectrum Leadership (Lockheed Martin's Leadership Standard)
- Business Development
- Capture Excellence (Proposal Management)
- Commercial Partnering,
- Programme Management
- Supplier Management
- Operating Excellence (Lean Six Sigma).

Taking our existing internal processes I have aligned them to with BS 11000 and developed approaches for:

- 'Breaking the Ice',
- Defining rules of Engagement,
- Executing Shared Objectives,
- Monitoring the Performance of Relationships.

No matter what the programme, often we can be working with multiple partners (prime integrators, sub-contractors and key suppliers) to meet a customer's needs. The critical initial task is to 'Break the Ice' between these organisations.

Each programme's stakeholder group is unique and by working with independent BS 11000 Facilitators and Behavioural Analysts, I have designed and executed a 'Kick-Off' Workshop that can be tailored to suit the needs of different programmes and stakeholders. It seeks to develop a common understanding and commitment to collaboration between all the partner organisations including customers, by enabling them to see the power of collaboration in a fun and friendly environment.

'Kick-Off' Workshops present numerous planning challenges, however a methodical and collaborative approach to organise these events is key. Prior to holding 'Kick-Off' Workshops I provide BS 11000 Awareness & Workshop Overview briefings to Programme Managers from all organisations and gain their buy-in and approval to hold the workshop.



Attribute	Shared View of Collaboration	Benefits of Collaboration
Purpose & Goals	<ul style="list-style-type: none"> <li>– Clearly stated.</li> <li>– Solid &amp; attainable.</li> <li>– Aligned with program plans &amp; priorities.</li> <li>– Commonly understood &amp; accepted.</li> <li>– Provide perceived benefit for all.</li> </ul>	<ul style="list-style-type: none"> <li>– Want to work towards a common goal.</li> </ul>
Characteristics	<ul style="list-style-type: none"> <li>– Mutual respect &amp; trust.</li> <li>– Inclusive and diverse.</li> <li>– Ability to compromise.</li> </ul>	<ul style="list-style-type: none"> <li>– Understand and respect for each other's organisation expectations/limitations and compromise when preferences of all organisations cannot be met.</li> </ul>
Structure & Governance	<ul style="list-style-type: none"> <li>– Adaptable, structure &amp; policies.</li> <li>– Parity; planning &amp; decision making.</li> <li>– Defined roles across organisational boundaries.</li> <li>– Formative and summertime evaluation.</li> </ul>	<ul style="list-style-type: none"> <li>– Resources empowered to own deliverables.</li> <li>– Ability to sustain program in the midst of organisational commercial constraints.</li> </ul>
Environment	<ul style="list-style-type: none"> <li>– Recognise &amp; accept complementary and competing factors between organisations.</li> </ul>	<ul style="list-style-type: none"> <li>– Identified collaboration focus areas and boundaries.</li> </ul>
Communication	<ul style="list-style-type: none"> <li>– Open &amp; frequent.</li> <li>– Established formal &amp; informal links.</li> <li>– Planned and monitored for effectiveness.</li> </ul>	<ul style="list-style-type: none"> <li>– Cohesive group working.</li> </ul>
Resources	<ul style="list-style-type: none"> <li>– Deducted &amp; continuing.</li> <li>– Skills sufficient for activities.</li> <li>– Shared by organisations based on plan.</li> </ul>	<ul style="list-style-type: none"> <li>– Increased availability of resources and skills development.</li> </ul>

The primary task during the 'Kick-Off' Workshops is for the team to agree on what collaboration is and its benefits.

All partners require rules of engagement that support delivery throughout the programme life cycle. Management structures and contract mechanisms are also required to facilitate, monitor, encourage and govern the working relationships. With this in mind, the second part of the 'Kick-Off' Workshop focuses on developing Multi-Organisation Collaboration Charters that include: shared visions, objectives, values and behaviours.

As with any other area of a programme, the health and performance of the relationship needs to be measured, monitored and improved. The Lockheed Martin Supply Chain Relationship Measurement Matrix (RMM) tool and process can be used to measure cohesion and partnering attributes by undertaking regular assessments. Results can be normalised to provide an informed perspective on the metrics. The purpose of the normalisation process is to understand the context and root causes of anomalous events, such that exceptional incidents or prevailing circumstances do not trigger inappropriate corrective actions. Any deviation from the base RMM metrics will be formally recorded and approved by the Programme Managers and support continual improvement on a frequent basis.

By 'Breaking the Ice', developing Collaboration Charters and measuring the Maturity of

Relationships, I believe the Lockheed Martin Relationship Management approach is in line with BS 11000 Collaborative Business Relationships framework and establishes a strong collaborative working experience for all companies involved, where the core principles for collaborative working are:

- Development and agreement of shared objectives so the team is always aligned.
- Providing leadership which is able to operate effectively across corporate agendas and cultures.
- Creating the right environment which will promote collaborative working and recognise individual contributions.
- Developing the core collaborative competencies and skills that will build, maintain and promote appropriate behaviours that will underpin collaborative performance.

Bringing people together and getting them to start, and then maintain, a dialogue while working alongside one another, as well as having clarity around shared objectives, means that the relationships develop and evolve, to the benefit of all involved – all aligned to a recognised collaborative working approach.

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# THE SECURITY OF PARTNERSHIP.

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WE'RE ENGINEERING A BETTER TOMORROW.

In our increasingly interconnected world, the need for organisations to work in partnership is more and more important. Modern leaders look to companies with strong experience in advanced technology, wide-ranging capabilities and a broad perspective to solve complex challenges. Our global team partners closely with our customers and approaches each mission and challenge as our own, whether we're supporting modernisation programmes, ensuring energy and economic security, protecting vital networks from cyber attack or launching satellites into orbit. When it comes to success in complex environments, we know partnerships make a world of difference.

Learn more at [lockheedmartin.co.uk](http://lockheedmartin.co.uk)



The NATS logo is rendered in a bold, white, sans-serif font. The letters are closely spaced, with the 'A' and 'T's having a distinctive shape. The logo is positioned on the left side of the page, above the main heading.

# NATS

## Partnering for Success

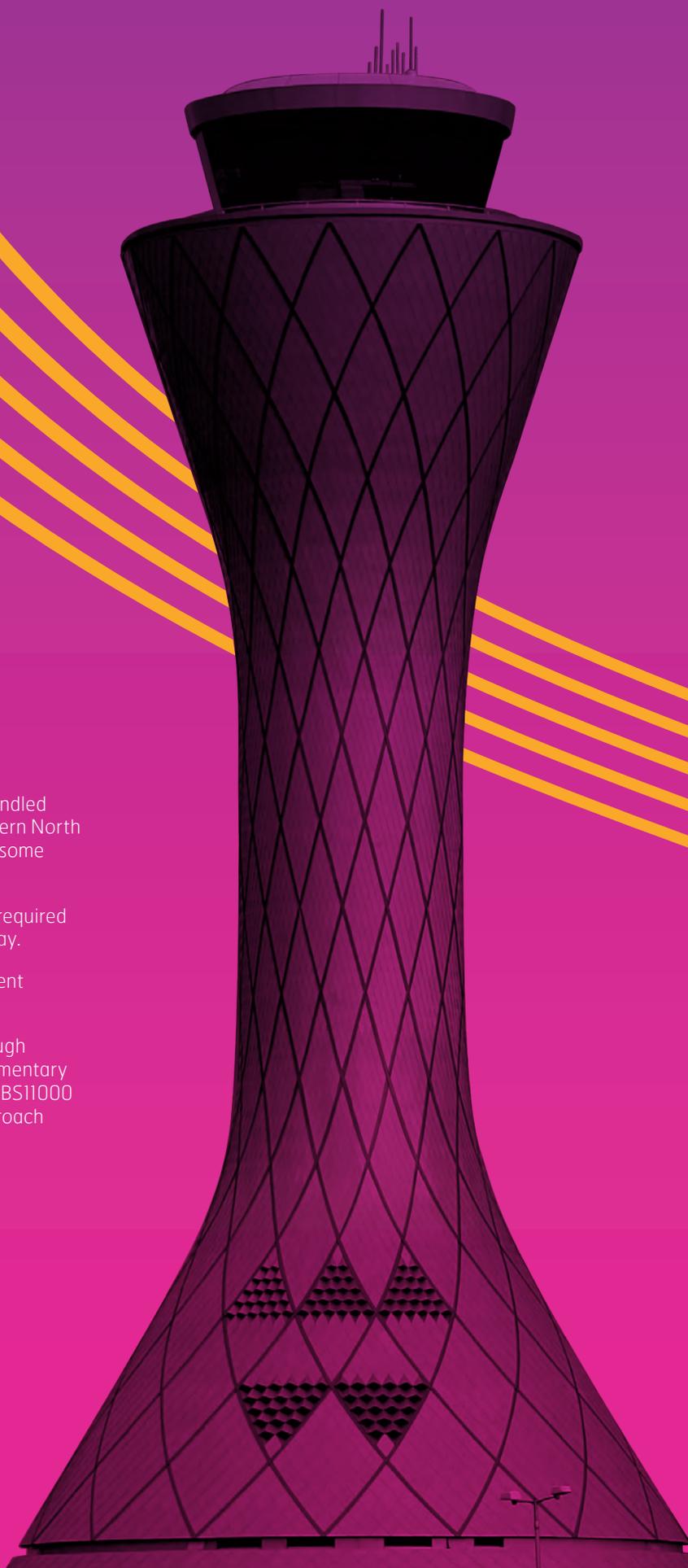
NATS, a global leader in innovative air traffic solutions, handled over 2.1 million flights in 2013/14 covering the UK and eastern North Atlantic and carried millions of passengers safely through some of the busiest and most complex airspace in the world.

Safety is NATS' first and foremost priority but we are also required to provide our services in an efficient and cost effective way.

We have a world class reputation earned by our commitment to deliver the highest levels of customer service.

We recognise that our business success is enhanced through building partnerships with organisations that have complimentary objectives and goals. We have embedded the principles of BS11000 and continue to develop and expand our collaborative approach with our strategic partners.

[www.nats.co.uk](http://www.nats.co.uk)



# A Single European Sky through Collaboration

Adrian Miller, NATS



As the world's communication and transport systems have become faster, easier, cheaper and its inhabitants wealthier, the demand for air travel has increased significantly. Since the 1960s the number of flights across the globe has grown by more than 50% per decade.

There are over 8.5 million flights in Europe annually with projections for flight movements set to double by 2020. Although airspace capacity has been increased by 80% since 1990, further demand can no longer be met in the same way as it is today.

For airlines the civil aviation market is a global, fiercely competitive industry, characterised by high costs, low margins, high rates of business failure and demand that exhibits a trend of long term growth but short term volatility.

The growth in demand has spawned a complex network of national, often insular, air traffic management technologies, methodologies and ways of working which has not evolved significantly since the 1960s. Due in part to their association with Military and Defence considerations, Air Traffic Management (ATM) organisations have

been largely state run monopolies which have generally developed their airspace and associated technologies, methodologies, and ways of working in isolation. The global market is challenging this philosophy, and in Europe the response is driven by the Single European Sky ATM Research (SESAR) programme.

## Joining Up the Sky over Europe



The European Union Single European Sky initiative was launched in 2004 with the intention of reforming ATM in Europe and driving improvement in performance and efficiency.

Within the Single European Sky (SES), SESAR represents the technological dimension. Its aim is to define and validate the new concepts that will be needed to give Europe the high performance air traffic control infrastructure it requires and deploy this throughout Europe to deliver the performance outcomes expected under SES.

## The Challenge in the UK for NATS

The Deploying SESAR transformation programme is a huge part of NATS' investment programme over the next 10 years and will transform our operations in support of Single European Sky. The three main outcomes of the programme will be: replacement of existing ATM systems; deploying a modern ATM platform through our Centres and introducing concepts of operation to increase flexibility, capacity and efficiency.

Deploying SESAR represents a major transformation for our business that will change systems, concept and procedures for many of our people, including controllers, engineers and support staff.

The targets for NATS are to maximise customer benefit and value by:

- maintaining safety levels and ensuring resilience alongside traffic growth;
- enabling Airline fuel savings – £180m p.a. by 2019;
- implementing price reductions – 21% within 5 years;
- working to a regulated rate of return;
- transforming our large complex platform.



## Meeting the Challenge

NATS has a solid pedigree and strong reputation in Air Traffic Management and continues to look to exploit its capabilities commercially to grow its business and ensure long term stability. Today we have multiple operations across our two en-route traffic centres supported by a tried, tested but complex technology platform. The European SESAR programme runs alongside NATS led programmes to re-design UK Airspace for future needs. The aim of the 'Deploying SESAR programme' is to create a single common operational and technology platform that can support the business in growing and leading this transformational change in Europe and beyond, positioning us as an on-going world leader in the Air Navigation Service Provider (ANSP) market.

Key benefits of deploying the programme will include:

- An optimised network with more efficient aircraft routing and up to 25% of additional capacity.
- New automation tools for controllers, driving flexibility and agility in our Operation.
- New and improved safety products and services.
- Environment – improved navigation throughout UK airspace, reducing aircraft fuel burn.
- Improved service resilience from the new platform, and changes in methods of operation.
- Influence in Europe by delivering SES technology & outcomes early, creating a 'shop window' for NATS to pursue its global growth agenda.
- Increased competitiveness through improvements in our underlying cost base.

## Supply Chain Collaboration is vital to NATS SESAR plans

The effective management of NATS supply chains is a strategic business activity, certified by the Chartered Institute of Purchasing and Supply to its highest standard of strategic procurement capability. A key pillar of the NATS Supply Chain Strategy is to establish and develop collaborative arrangements with key suppliers and partners. Supply Chain Management takes the lead in managing these relationships, determining strategies by working closely with internal stakeholders. We have developed a best practice Supplier Relationship Management process, incorporating supplier performance measurement & continuous improvement. Our SRM pedigree is underpinned by maintaining certification to BS 11000 since 2010.

NATS recognised long ago that collaboration is important to its business success and that building partnerships with organisations that have complementary skills and expertise help us to address our long term considerations and priorities. We have invested significantly in resourcing the development of these key relationships to seek to



build enhanced associations beyond conventional customer-supplier, pursuing opportunities to work together towards achieving common goals, generating mutual benefit and typically sharing risks & cost. In particular our strategic partnership relationships are jointly managed by applying the requirements of BS11000, detailed in a joint relationship management plan. It's a structured approach, appropriately detailed to deliver mutually agreed objectives and value creation opportunities that have been agreed or identified.

Meeting the challenges of deploying SESAR by cultivating the right relationships ensure long term benefits with partners enabling them to improve efficiency in delivering NATS and other customers' requirements, whilst developing their capabilities to generate more business by providing a broader range of key systems or services to NATS on preferential pricing & terms. These improvements deliver better value to NATS through economies of scale, risk transfer and more effective working practices, whilst improving partner capability, revenues and reputation.

Our complex legacy environment, integration of COTS (Commercial Off the Shelf) technologies and need for structured transition require closer strategic integration of our key partners/suppliers & 'programme level' strategies. We will also be working hand-in-hand with the business to drive intelligent requirements and certainty of outcome – establishing common capabilities for the benefit of multiple projects. In particular we have developed a strategic partnership with Lockheed Martin to help us on our journey from legacy systems and collaborating on retained capability.

Another key relationship is with Indra the leading Spanish IT organisation. They are supplying a new Flight Data Processor (FDP) called iTEC – a key system that provides most of the functionality in controlling airspace and the functionality for inter-operability between ANSP's, and enhanced automation tools for greater capacity and flexibility. iTEC should meet future traffic demands with reducing maintenance costs and improved resilience over legacy systems.

We are also collaborating with other key European suppliers including Frequentis (Austria) and Altran (France, UK) on developing a new strategic HMI (Human Machine Interface) for Controllers, with Indra/NATS working alongside to ensure value engineering.

These multiple collaborations highlight our motivation to establish a business wide capability to work with and develop a network of leading edge technology organisations, securing our future.



## Future Collaboration

NATS wants to be at the heart of European collaboration. Our strategy for SESAR is not limited to working with our supply chain partners. NATS work jointly with other ANSPs, technology and industry partners to maximise cooperation in delivery of the vision for future European ATM for the benefit of both passengers and the Aviation Industry alike.

Back in 2007, NATS signed a MoU with DFS of Germany and Aena of Spain that set out our collaboration on the joint development of iTEC (interoperability through European collaboration), ensuring shared costs and development with the wider European network in mind – maximizing our collective influence in setting standards for the future Single European Sky. This collaboration has since has been broadened to include the Netherlands, with other key European players also now interested in joining.

NATS have also drawn on the German ANSP's (DFS) experience of deploying iTEC in their Karlsruhe operation as a baseline for its own deployment at Prestwick for Scottish upper airspace, accelerating implementation and acceptance in the operation as a consequence of seeing iTEC in operation and discussion peer to peer.

NATS Customers and Regulators (CAA/MOD/ Airports/Airlines) are key to our collaborative approach – we consult, seeking regular engagement and feedback from them to ensure we are aware of their needs and expectations.

Ultimately we see a whole range of collaboration opportunities to harness the experience and capability that we acquire through deploying SESAR to adopt for our other global business aspirations. These new ways of working will undoubtedly change our industry and NATS are proud to be at the forefront of this evolution.

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# ***The Collaborative Animal: How collaboration makes people special and organizations possible***



***Nick Chater, Warwick Business School,  
Warwick University***

Collaboration can break out at any time. An impromptu lunch meeting moves to the caf terrace – a sheaf of papers is picked up by the wind and scatters. But, in moments, people from adjoining tables are picking up sheets as they float and tumble by – collecting them up, even dashing after papers that spin by. Soon the pile of papers, a bit muddier and more disordered, is back on the lunch table, underneath a water jug. Or, rather more alarmingly, a lone diner, unwittingly combining a second bottle of wine with the brutal heat of the summer sun, faints and slumps forward onto their table. The electricity of collective concern and activity is almost palpable – people rush to help, help the diner into a more comfortable position, a passing waiter hurries across, the emergency services are called if matters look serious.

Spontaneous collaboration between strangers is so natural to us that it is easy to forget how remarkable it is. As far as we can tell, spontaneous collaboration is uniquely human. It is unthinkable, for example, that a collection of chimps would suddenly coordinate their actions in time of crisis, large or small – indeed, it is unthinkable that a collection of ‘stranger’ chimps in the same space would even co-exist without outbreaks of threats, fear and possibly violence.

What do humans have that makes us able to be a ‘collaborative’ animal – indeed, the collaborative animal? One key element is that we can spontaneously and naturally recognize each other’s thoughts and goals. Seeing the papers fly across the terrace, we can all immediately recognize

this is unintentional and unwanted – and we can collectively help gather them up. Or, seeing the slumped diner, we immediately see that they have fainted, and are not merely taking a brief nap; and so that help may be needed. A second key element, having spotted an anomaly, a problem, or a goal, is that we can spontaneously coordinate our reactions. I grab these papers; you grab those. I’ll call the ambulance; you check the diner’s airways are clear. Sometimes we shout directions and suggestions to each other – often it is obvious what each of us should do – and we just do it.

Most collaborations are not one-off interactions between handfuls of strangers of course. We often collaborate with the same people, on (roughly) the same tasks, time after time. And when we do the same thing, or similar things, we find that our collaborations become increasingly smooth and efficient. Each of us gradually develops our own role and responsibility, we develop a collective understanding of the ‘way of doing things’ – in essence, we increasingly work as a team. And yet, of course, however long we work together, flexibility and improvisation is always required: the next challenge is never quite like the last challenge, after all. So, for example, doubles partners in tennis develop conventions concerning the goes to the net and who stands on the baseline; football teams learn to coordinate their attacks, so that a pass can be directed into space at the very same time as another player begins to enter that space.

To make us better collaborators still, we begin to ‘formalise’ roles and responsibilities, the goal we

are attempting collectively to achieve, and the principles, procedures, and ways of working, that we will use to achieve them. We begin to stick, most the time, the same roles and responsibilities; rather than figuring out how to do everything from scratch each time; and we establish ways of working – procedures, practices, norms – so we all know who is supposed to do what; and how we are supposed to do it. In short, we begin to create *organisations*, from sports teams and clubs to businesses, unions and governments. And, by working together in such organisations, we can achieve things that would be impossible for us as an uncoordinated collection of individuals.

Without the spectacular human ability to collaborate, organisations would never have come

into being at all; indeed, from this point of view, we can see that the very purpose of organisations, of all kinds, is to enhance collaboration. It may not always feel like it! The very organisational rules and roles that can help us work together better could take on a life of their own – we can find ourselves hemmed in by procedure, crushed by meetings, and following a rigid chain of command, rather than getting the job done in the best way we know how. We need to fight back and remember why organizations exist in the first place: to capture the remarkable benefits of working together.

Nick Chater is Professor of Behavioural Science.

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*True collaboration!*

# ICW – Executive Network Members

COLLABORATION & THOUGHT LEADERSHIP



# BS 11000 – See further and go further !

## Michelle Millington, AECOM

AECOM's combination with URS brings our company to nearly 100,000 employees, operating in over 150 countries, with a vision to become the world's premier, fully integrated infrastructure firm. We are driven by a common purpose – to impact lives positively, transform communities and make the world a better place.

We embarked upon our journey to the BS 11000 standard to provide a structured framework for the development of collaborative working relationships, whilst offering the potential to create added value that could not be sought through traditional, stand-alone working arrangements. For AECOM, collaborative working is nothing new – indeed it is integral to successful project delivery. The adoption of a structured, formal and universal management system, backed and audited to a British Standard, was seen as real innovation. We recognised the Standard as the cornerstone of best practice, capable of facilitating a cultural change in our business. BS 11000 offered an opportunity to develop joint delivery processes and standards, and, crucially, to share risk in order to deliver financial and technical rewards.

The development and implementation of a collaborative working management system in AECOM was headed by Michelle Millington, Business Assurance & Improvement Director. In her role as Senior Executive Responsible, Michelle established a working group of individuals selected from across

the business to develop the tools to manage our collaborative working relationships. At the heart of this is our Corporate Relationship Management Plan, which outlines our strategy for collaboration and identifies the necessary processes to follow in order to deliver projects in accordance with the Standard.

The Corporate Relationship Management Plan was developed to follow the eight stages of the BS 11000 standard. Input was sought from both our Business Development and Project Delivery teams, in conjunction with a number of critical support functions, to ensure fitness for purpose. Throughout the process, we actively engaged our certification partner to undertake gap analyses and document reviews, and included an internal audit of the proposed management system to identify any shortfalls and implement improvements.

We are now looking to implement one system across AECOM and to ensure best practices are captured. Initial indications are that this will be a relatively straightforward process as both organisations' systems are closely aligned to the BS 11000 standard.

Each of our collaborative relationships is headed by a relationship manager (often the project director/project manager) who is empowered to lead the project and has responsibility for controlling working practices in agreement with



other stakeholders. The relationship managers are expected to resolve any technical concerns and incorporate lessons learned to aid continual improvement. Relationship managers are appointed based upon their skills and behaviours measured against a pre-determined standard. Much emphasis is given to behavioural management, which has made traditional project director/project manager appointments available to candidates who may not previously have been considered.

Technology has played a key part in the success of our collaborative practices as it can bring people together across different geographies and provide a common platform from which to work. By providing collaborative IT platforms, we are breaking down communication barriers and have been able to increase the efficiency of our delivery. We have found that collaborative platforms – such as Business Collaborator and ProjectWise – are essential for effective and efficient collaboration and that social networking tools such as Lync, Chatter and Yammer can be useful for enabling global knowledge sharing. We believe that widening

accessibility to information, objectives and process performance measures facilitates improvement and helps engender creativity and engagement amongst colleagues.

Since successful certification in 2014, we have built collaborative relationships across our portfolio of work. AECOM is actively engaged in multiple large-value projects where we play a lead role in joint venture and alliance arrangements. Bringing these relationships inside our concise and structured management systems is delivering added value, and we are using our collaborative working experiences as a springboard to secure further opportunities. Changes in cultures and behaviours are being instilled in our staff to allow further efficiencies to be realised. Our BS 11000 system is facilitating continual innovation so that AECOM collaborations are at the forefront in delivering the most exciting, technically challenging and complex projects, and in supporting our clients so they “see further and go further.”

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# Building a supply chain based on relationships



**Keith Gardner, Skanska**

The collaboration between contractor and supplier is widely recognised as the cornerstone of any successful construction project. Nowhere is this more the case than in Manchester, where, in the opening stages of a £1.3 billion infrastructure project, our team took a new approach to the procurement process by appointing a supply chain based not just on technical capability, but on their values and how well they can work with us.

Achieving a truly integrated team isn't easy. However, Skanska believes that, by working together with our clients, partners and supply chain, we have the greatest opportunities to move the industry forward.

## Working in alliance

In recent years, economic activity in the north of England has applied pressure to the city's infrastructure and growth shows no signs of faltering. In 2014 we were invited to begin work on the Northern Hub, a project set to transform the rail travel experience for millions of passengers in and around Manchester. We are playing a crucial role in linking the three core stations for the very first time – a development that will slash travelling times for passengers and remove major bottlenecks from the network.

Working as part of a multi-contractor alliance, alongside stakeholders with a range of interests





and expertise, the ability to collaborate and form tight working relationships is clearly a priority. In fact, seeking out opportunities to increase collaboration was a pre-requisite of winning the contract.

The work will be logistically challenging. A huge viaduct – known as Ordsall Chord – will be constructed. There will also be a re-configuration of Oxford Road station and a further two platforms built on a new viaduct at Piccadilly station – as well as the complexities associated with handling a Victorian-era railway. The operation will take place in live station environments and within the city centre of Manchester.

### Selecting a supplier

It's taken for granted that traditional methods of procurement can evidence a supplier's experience, strengths, and commercial stability. Where they fall short, however, is in their ability to demonstrate alignment with our values, relationship building skills and all-round collaborative behaviour.

From early on, the steelwork contract was identified as an incredibly significant and critical element of the construction stage, the success of which had the scope to make or break the scheme. The work constitutes a huge percentage of the overall project cost, it would require a team that could integrate seamlessly within the alliance and contribute to our shared goals.

We invited shortlisted suppliers to a two-day workshop where they were independently assessed, not only on their technical outputs, but equally the way they interacted with their own teams and those of the alliance partners. Unlike anything we've done before, over fifty percent of the marks available were dedicated to collaborative behaviour.

### Reducing costs

During the workshops, participants were asked to complete seemingly impossible challenges, such as appearing on television within twenty-four hours. Of course, the expectation wasn't that tasks would be completed. We were assessing their attitude and ability to pull together. We wanted to see the distance they would travel to avoid letting the team down.

On one occasion, suggested amendments to our design saved over £350,000, which has been taken forward into the permanent design. Our approach may seem novel, but having the ideal steel contractor as part of our team, aligned directly with our goals from the very beginning, has paid dividends.

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# Cities Unlocked

## Kirsty Necker, Guide Dogs

As we join in celebrating the 25th anniversary of the Institute for Collaborative Working, we at Guide Dogs reflect on the changes that have occurred within our own organisation during this time.

If you were to say 'Guide Dogs' to most people they would very likely think of a yellow Labrador in a harness leading someone who is living with sight loss through the streets of their community: an iconic image, which often brings deep and powerful emotional responses.

While in many ways this is still our most recognisable service, the image gives only a brief glimpse into what we actually do as an organisation. Our mission "We will not rest until people who are blind and partially sighted can enjoy the same freedom of movement as everyone else" requires us to be much more than a reactive organisation – it requires us continually to assess and update our mobility options, 'future proof' our services and ensure that environments (both real and virtual) are fully accessible to those with sight loss.

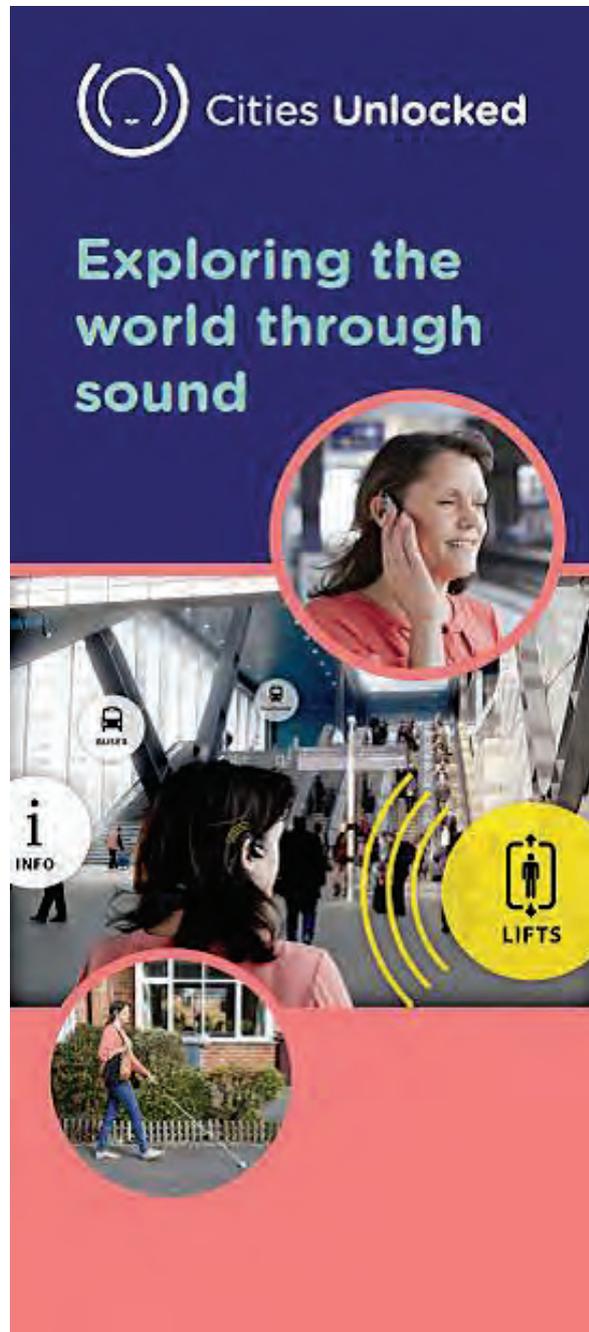
Which is why in 1990, while the ICW was in the stages of conception, Guide Dogs began a change in strategy and started funding scientific research into human eye conditions and guide dog health, including ophthalmic research, canine research and social research on the functionality and needs of people who are blind or partially sighted.

The research has been used as the foundation for many studies and for planning and strategic purposes, both within Guide Dogs and more widely. Research funded by Guide Dogs has led to progress in the visual impairment field and remains a vital part of Guide Dogs' strategy. It strengthens our understanding of the overarching issues and influences our decisions and priorities.

A key part of this work is in collaborating with other organisations. The success of our strategy depends on our willingness to work together with other agencies, organisations in the sight loss sector, international assistance dog associations, local and national government, commercial businesses, pan disability groups, public sector groups and many other partners. It enables us to ensure that our services are critical and relevant and that, as an

organisation, we are key influencers and thought leaders in our own sector and also on political, campaigning and social agendas.

This desire to act on our research findings and be a proactive organisation for people who are living with sight loss were two of the key factors that led us to develop a collaborative project 'Cities Unlocked' (initially entitled 'Family Day



Out') in 2012. Early in the project Guide Dogs began discussions with Microsoft and key partners to explore the potential to develop technology solutions that would enable people with sight loss to navigate their environment and take part more fully and spontaneously in their community. This was described in The Partner in 2013 and the ICW was instrumental in bringing about these conceptual talks.

Working alongside core partners, Microsoft and Future Cities Catapult, and group partners Network Rail, First Great Western, Reading Borough Council, Reading Buses and Tesco along with technology suppliers such as Nokia, Mubaloo and Aftershockz, we were able to launch the first phase of Cities Unlocked and demonstrate that directional soundscape technology empowers people living with sight loss to get out and about in our cities independently. The concept was launched at the beginning of November 2014 to wide international media and technological acclaim.

The research that backed the project (done in collaboration with the University of Nottingham and Helen Hamlyn Associates) conclusively proved that a headset that provides audio cues, which appear to come from the direction of the point of interest and provide orientation cues and the ability to be spontaneous, had an enormous impact on measures of wellbeing and orientation for those accessing the community with impaired sight and enabled a greater understanding of the social environment around them.

The findings were enormously exciting and the participant feedback overwhelming. With support from the highest levels of Guide Dogs and Microsoft, we are now considering how we take 'Cities Unlocked' forward. You can find out the latest position at [www.guidedogs.org.uk/citiesunlocked](http://www.guidedogs.org.uk/citiesunlocked) and view the research report and video demonstrating the 'story so far'.

We truly hope that the development of this technology solution will influence the way that people who are living with sight loss can get out and about in their environment on their own terms and add to the range of mobility options that our service users can choose from in the future.

From Guide Dogs' point of view it has also determined that, as an organisation, we depend



Pic by Stewart Turkington [www.sphotos.co.uk](http://www.sphotos.co.uk).

on collaborative working in order to drive and develop our work, and it is with great pride that we became the first Third Sector organisation to qualify a member of staff in the 'Collaborative Leaders' course, with a view to becoming the first such organisation to attain BS 11000 certification and truly prove our commitment to professional and accountable partnership working.

The last 25 years have been extraordinary for the world, for the ICW and for the way in which organisations conduct their business. Whatever the future throws at us in Guide Dogs you can guarantee that we'll be ready to take on challenges on behalf of people who are blind or partially sighted – whether these are advances in medical science to cure or prevent sight loss, technology solutions to aid navigation, driverless transport or embedded technology.

However, while we take strides into the future, you can be reassured that there will still be a leading role for our best collaborative partner – **the guide dog!**

[kirsty.necker@guidedogs.org.uk](mailto:kirsty.necker@guidedogs.org.uk)

# Reality, leadership, and collaboration

**John Johns, US Department of Defense**

## Reality

We live in a chaotic world, a world filled with uncertainty, instability, limited resources, ambiguity, incompetence, and confusion. We create, at the same time we criticize, overwhelming bureaucracies that consume our lives and our energy. We build increasingly complex things, machines, transportation systems, buildings, and weapons that require increasingly skilled people and processes to develop and operate them. All this induces huge amounts of inefficiency, threatens our effectiveness no matter our business, creates danger throughout the world, and unnecessarily consumes enormous resources.

So with that opening, you must think I believe the end of the world is upon us. Well, I don't. Instead, I believe the world is ours to make. We are in a pivotal moment in history and much is riding on our ability to understand the reality of this moment and appropriately react to it. To overcome the challenges we face and shape the world into what we want it to be will not be easy. But being hard is not an excuse for inaction – in fact, being hard has never been a good excuse for not doing the right thing.

But you actually already know this, there may not have been many who have spoken these words in exactly this way, but you know it, you feel and see it all around you.

All you have to do is pay even a little attention to the situations in Iraq, Iran, Afghanistan, Russia, Ukraine, Western Pacific, Africa, and in our board rooms, on our production floors, in our class rooms, on our televisions, in our governments – you see it and you know it.

Now, I could say, let's just all work it out – let's bring everybody together on any infinite number of problems and just work through them – how simple that sounds – surely that would work? But haven't we tried that before? And yet here we are, still facing some of the most vexing problems we have ever faced, and with little progress to show for our efforts. In fact, at times it seems that we are reliving some things we thought we had solved, only to see them re-emerge. How is this possible? Why do we tolerate this?

The fact is we tolerate too much - we tolerate mediocrity or even incompetence; we tolerate lies and half-truths; we tolerate singularly focused self-interest; we tolerate political expediency; we tolerate any other innumerable demonstrations of misbehavior. In this domain, let's not confuse flexibility with tolerance. Certainly, we need to be flexible to see other perspectives and accept alternative paths. And we know flexibility is a key ingredient in collaboration. But that doesn't mean we need to tolerate things that are fundamentally wrong, things that will lead us down the path to ruin – in these cases, we must have absolutely no tolerance – no tolerance for incompetence, no tolerance for those without integrity, and no tolerance for self-interest that overrides the greater good.

## Leadership

Change is coming – in fact, change is upon us, and we can either lead, or follow – but we will not be able to get out of the way. And our past successes, no matter how remarkable and noteworthy they may be, will not be good enough to secure our future. We will need new levels of flexibility and agility. We will need new processes that are linked from an operating unit to our headquarters that can turn inside evolving conditions and enable a corresponding evolution in strategy and tactics. We must embrace powerful goals that drive innovation, that include not only major cost reductions but also radical performance improvements. We must pursue this directly and with a sense of urgency – to miss this, would be a serious mistake. We risk campaign success; we risk business success; we risk security of our nations; we risk our future.

In this moment, and in the future, we require leaders. We require leaders that are capable of seeing new patterns in complexity and conflict and applying new methods to achieve unconventional outcomes. We need leaders, at all levels, that have no tolerance for status quo and mediocrity. We need leaders with competence and courage, with the ability to learn and adapt quickly. We need leaders that are comfortable making decisions, and taking action in the face of significant ambiguity,



unclear guidance, and near impossible timelines. We need leaders that know how to generate both unity of command, and, unity of effort.

Our leaders will need to bypass or breakdown old, irrelevant processes, and unleash waves of innovation. And we know, innovation has no predetermined allegiance to anyone or any organization – it belongs to those that understand their business, that are driven by a vision of what can be, not what has been. We know innovation is perishable, it must be encouraged and protected, it must involve those at every level, in every part of our business, and it must be recognized and rewarded until it becomes a part of our culture.

This doesn't mean we abandon tradition, because there is power in tradition, but tradition can and must involve innovation. This can perhaps be seen best when we examine our military institutions. In fact, from the earliest days of our nations, our militaries have had a history rich in duty, honor, courage, and victory. And our dominance of every battlefield on which we stand, the air on which we fly, and the seas on which we sail, is rooted in both the mastery in the art of warfare, and in the exploitation of innovation: innovation in strategy and tactics, in processes, and in weapons.

It is said that fortune favours the bold. The true breakthroughs, the major advancements, the unlikely victories, come from those that see what can be, that seek a new future, that are fearless in

pursuing it. This in fact is our duty, our covenant, our sacred promise, to produce results that are required by our militaries and our countries to fight, and win, on any battlefield, of any kind, at any time. This is no different in our boardrooms and in our duty to the public and shareholders alike.

But boldness is not enough.

## Collaboration

It remains all our duty to recognize and contribute to the greater good. We must be able to understand the interests of others and exercise the flexibility and skill in accommodating those interests, while protecting our own.

And just because we can see the need for collaboration doesn't mean we can just wish it into being. There is a science to collaboration and we must be well practiced at it. In fact, we should all be experts, because we must accept the simple fact that no truly great thing is achievable without others. No great accomplishment was, or ever will be, possible without collaborative effort. In fact, the more complex a thing, the more challenges we face, the more disciplines are involved, the more integration is required, and the more collaboration is demanded.

It is time for collaboration based on respect – respect for well argued positions – respect for expertise – respect for remarkable performance.

It is time for collaboration rooted in both art and science. It is time to put in place principles that bind us by covenants, and not just contracts or legal documents. It is time not to be just practitioners, but instead, experts and evangelists. The science can be seen in the knowledge embodied in standards such as BS 11000. This Standard substantively advances our understanding of the essential elements, framework and processes of true collaboration. Practice of this science enables us to establish successful collaborative business relationships, mature those relationships, recognize and manage risk, create exceptional value, and drive continuous improvement toward uncommon results.

But while this science is necessary, it is not sufficient. We need the "artist." We need the artist to apply the principles of this science. Like any great piece of art, it is not simply a collection of canvas and paint applied in the correct order. There is an ingredient that can only be provided by the artist. An ingredient that differentiates a common work from one that is uncommon. What makes relationships so difficult is that more than one person is painting on the canvas at the same time, and still the result must look as though only one artist held the brush. We need the artists: we need the leaders that know this and have the skill to execute it. And this is uncommon.

It is time carefully and ruthlessly to choose these leaders – leaders that understand what I have just said – leaders that demonstrate extraordinary courage, honour, determination, and judgment

– leaders that understand how to nurture and protect innovation – leaders that understand and can enable collaboration – for it will be only those leaders that will take us to new heights of performance and to deeper connections between all parties necessary to solve the most complex problems of our time – it will be only those leaders that will move us aggressively forward in the right direction, intolerant of misbehavior and relentless in the pursuit of excellence.

There is no greater example of this fusion of science, art and leadership than in the work enabled by the Institute for Collaborative Working and David Hawkins. They serve as models for us all to emulate as we attack the most pressing problems, forge critical relationships, and set our future direction.

## Our Future

The pivotal moment is upon us. The future is ours to shape, and make no mistake, the high court of history will hold each of us accountable, with the lives of those we send to stand on future battlefields and the national and economic security of our countries.

You represent the greatest countries in the world. What makes us great is our inability to accept a seemingly unsolvable problem or unsurvivable situation – in fact, we love them – we seek them out – because we must – the world demands it – we demand it of ourselves. We are compelled.

[john.b.johns.ciu@mail.mil](mailto:john.b.johns.ciu@mail.mil)



### John Johns

Deputy Assistant Secretary of Defense (Maintenance)

Mr. Johns is responsible for oversight of the U.S. Department of Defense's \$80B Military equipment and weapons maintenance programme. He has served tours in both Iraq and Afghanistan developing the capabilities of the Iraqi and Afghan National Security Forces. He led U.S. Naval Aviation Intermediate and Depot Maintenance where he was responsible for a workforce of 16,000 military and civilian personnel and the annual maintenance and repair of over 700 aircraft, 5000 engines and modules, and 500,000 components. Mr. Johns was also responsible for the maintenance and repair of all Army Aviation and Missile Systems redeployed from Iraq and Afghanistan in the early years of the two wars. He holds a Bachelor of Science degree in Aerospace Engineering from Pennsylvania State University and a Master's degree in Aeronautics and Astronautics from Purdue University. He is also a graduate of the National Security Management Program from the U.S. National Defense University.



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# Together we grow

**Dietmar Harteveld, Siemens**

**Dietmar Harteveld, Head of Supply Chain Management (SCM), NW Europe:**

Growth is one of the key agenda items for many organisations: this applies to Siemens. We also understand that knowledge in the total supply chain is an important element to support growth, whether this knowledge is process, business or innovation, all are key.

Within Siemens SCM in the UK we have decided further to embrace that through knowledge sharing we facilitate growth in the wider Siemens organisation. Tapping the extensive network of our supply base and making this more accessible to both the supply chain and the internal Siemens organisation drives our SCM motto "Together we Grow".



**Dave Campbell, GS / LO Category Manager:**

I think it is reasonable to assume that most organisations engaging with BS 11000 are customer facing yet for many procurement functions 'Supplier Collaboration' remains an enigma and an untapped opportunity in our pursuit of continuous improvement and added value.

We were no different: our Supplier Relationship Management process was too one sided, defining our category objectives without tapping into the supplier knowledge and expertise and focusing on areas of improvement against supplier non-conformances.

Today we are changing our approach to suppliers. BS 11000 has provided us with an excellent structure but, perhaps more importantly, a change in our cultural thinking as to how we engage with our suppliers. We are now far more open, not only sharing our strategic objectives but allowing them to influence them. We are more transparent, open and look to develop a culture of trust and the development of 'joint' management plans, incorporating both our objectives, has been a key enabler in this regard.

We have implemented this approach with over 40 key strategic suppliers to date and our focus is not to extend this to an unmanageable number but to build on the foundations of the growing relationships supported by a level of executive sponsorship that has previously been sporadic at best.

Of the 40 suppliers, we are currently only intending to achieve BS 11000 certification against 2 suppliers. This may seem something of an anomaly, but certification is not the pinnacle: it is our cultural change to Supplier Collaboration which incorporates many of the ingredients from this excellent Standard that is now delivering the added value we once desired.



**Graham Jones, Head of FM Business Improvement, Siemens Real Estate:**

**What does this mean Operationally?**

As the person that has to work with the partners on a daily basis my experience says that all is well with these business relationships as long as performance and delivery lives up to expectations. However what happens when the service is not up to standard and improvements are needed?

I don't believe that our partnership with one of the suppliers would have lasted without the principles agreed in our quest for BS 11000.

Being absolutely frank, it's due to the culture we have developed and the processes put in place that has allowed us to be honest, work together and put the contract "back on track".

I am pleased to say that a jointly managed improvement plan is now paying dividends and service levels are improving and are now very near to the level required. All stakeholders are optimistic that we will surpass the targets and be in a position to delight customers.

Make no mistake, if for any reason service levels do not hit the mark, as part of our improvement plan we do have a joint exit strategy. Hopefully it won't come to that but, notwithstanding this, all stakeholders are under no illusions of non performance.

In the future we hope to grow the BS 11000 certification by involving other suppliers and indeed our customers, sharing targets and focusing on the end customer's vision.

**When you include honesty, integrity and – most of all – having fun, who wouldn't want to work this way!**

[Dietmar.Harteveld@siemens.com](mailto:Dietmar.Harteveld@siemens.com)



# ***So you want to collaborate – have you got the right learning culture and technology?***

***David Mason and Katja Schipperheijn, Frost & Sullivan***

Do you sometimes wish that your organisation allowed you to network, as well as collaborate with and learn from your colleagues, in the way that you do with your friends? In this article we examine the evolution of technology platforms and suggest that a learning culture needs to develop to support the potential that can be gained from such methods of communication.

The need for platforms has grown, due to globalization and the desire to adapt corporate conversations from top down one-direction broadcasting to collaborative multi-way inclusion. Employees need to become engaged in a new social thinking strategy to create a sustainable climate for personal and corporate growth.

Corporate intranets were first introduced in the 1990s and are at this point in 2015 a normal but rather old-fashioned medium. A closer look at what intranets were and are becoming will reveal that not only has the medium undergone a considerable evolution, but also the way employees work and decisions are made is evolving rapidly. Increasingly we see companies wanting to use the knowledge within their organization to the fullest extent and as a potential means to gain competitive advantage. This means you need the capability to harvest all the knowledge in a company, some of which is located in structured and easily accessible formats, but mostly in unstructured formats, such as emails and files saved on hard drives.

Going back to the 1990s – and looking at the evolution that the first intranets have gone through – we see a trend towards greater interactivity and collaboration in four stages. As you read this article you can map your organizational fit and where, potentially, you may wish to focus future technology and working process development for more effective collaboration.

## **1. Data Repository**

In its initial form we could state that shared databases would be the first intranets. Protected by firewalls, a collection of documents is made accessible for members of the same organization or

community. Those content management systems are maintained by administrators (IT department) and currently still in many cases hosted on corporate servers. They contain static content and data is more important than the conversation or the sharing of knowledge.

## **2. Broadcast of News**

In the next stage we see companies looking for ways to get their employees engaged around data. In this stage leaders recognize the value of employees' involvement in decision making and want to hear internal news directly and not via public media channels.

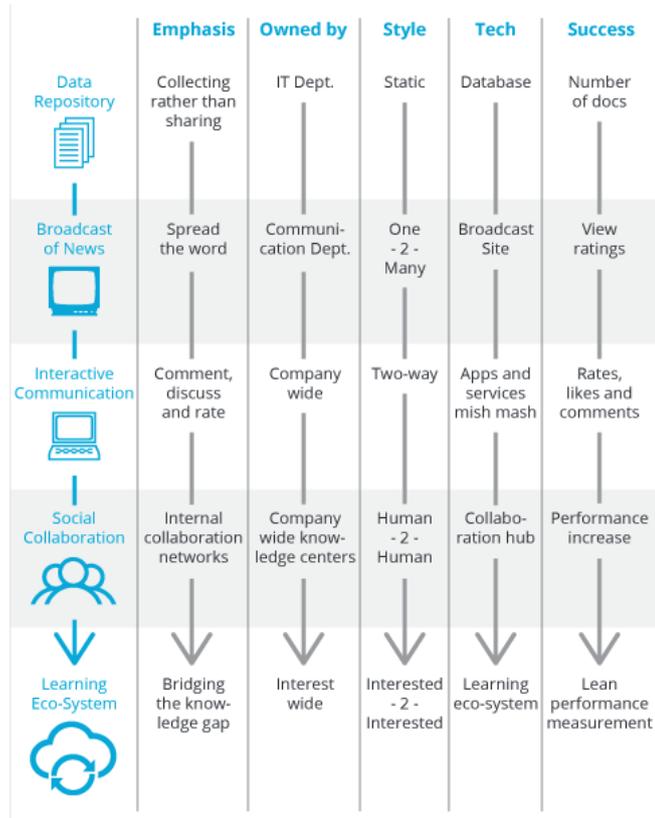
Sets of messages are broadcast through internal channels. Communication Managers get a significant role within organizations: they need to get the strategy and mission of the company out to all people involved. The message is sent but is the message understood?

## **3. Interactive Communications**

The crucial step in all organizations – and in the evolution of intranets – establishes itself when all employees can engage directly with both site content and corporate conversations without being part of a silo such as an IT or Internal Communications Department.

This is when the intranet and the organisation take the social path. Users get the chance to share, rate and even comment on blogs, being part of corporate strategy and internal communications. They become part of the decision-making unit of the company, are internal communicators and replace IT administration. Silos start disappearing.

As far as supporting platforms are concerned, we see that content management systems are linked to chat rooms, broadcast sites get social features, discussion forums are created; this helps to facilitate communication across the organisational boundaries. However, new tools and platforms are being created to answer all new needs - often with overlaps in functionalities.



#### 4. Social Collaboration

In this stage the intranet relinquishes its primary identity as a place from which information is retrieved to a place where people can collaborate.

This stage is even more influenced by the popularity of social network sites like Facebook and LinkedIn. Social organisations are reinventing their intranets to become internal professional collaboration networks. The function of the intranet has changed to a place where you find information and get things done together. Content management systems, chat rooms, and social collaboration tools are flourishing in social companies who are all trying to improve corporate conversations and social collaboration. However the risk of having all these tools is that, again, there is too much and employees lose track of the benefits for themselves and don't use the tools for their purpose of social collaboration.

New intranet platforms offer integration with existing tools and are placed as a hub over existing tools, combining the strengths of each of those for its best purpose. Discussion forums, chat rooms, blogs, micro-blogs and files are all integrated and become one system.

In this stage the most valuable asset is not more content, but the people and their expertise and experience.

Organisational barriers start disappearing and people share news, best practices and even fun

stuff like they do around the coffee machine. A community emerges using the platform for belonging, sharing and co-creation in one place. Social collaboration does not necessarily stop within the organisation's intranet but can include partners and customers.

#### 5. Will the future bridge the knowledge gap?

So we have a community and people collaborate - so what could we improve? The successful transfer of knowledge between organizational units is critical for a number of organizational processes and performance outcomes. Organisations should strive to distribute knowledge within their organizations using an internal social and learning eco-system. "Learnsapes" bridging (regional) departments, corporate hierarchy and formal roles can be created with one purpose: the flow of knowledge through the organization.

Any corporation, big or small can only be as collaborative as its culture allows. Evolution through the stages needs to be supported with an aligned capability of leaders to create the culture which supports social learning and the organisational capability to link this form of learning to helping an organisation achieve its goals.

[David.Mason@Frost.com](mailto:David.Mason@Frost.com)



**UNLOCK COLLABORATION**

**ACCELERATE GROWTH**



# Building air traffic management systems through collaboration – a European success story

**Ramon Tàrrrech, Indra**

“iTEC work is very present in several areas of the Single European Sky, so today’s signing ceremony for the new-generation ITEC Controller Working Position is of high relevance to Single European Sky objectives”

**Maurizio Castelletti, European Commission Air Transport Directorate**

Today’s Single European Sky (SES) initiative requires major effort by all parties towards its ultimate goal of enhanced safety, in parallel with the elimination of economic inefficiencies in the order of €5 billion per annum. This means that advanced technology, developed jointly through partnership is essential, and it should focus on the right functionality to enable all the expected benefits of a ‘Single Sky’ to materialise.

iTEC (interoperability Through European Collaboration) is a highly innovative and successful arrangement for developing and deploying transformational Air Traffic Management (ATM) systems. It has already involved 10 years of joint commitment and hard work between several major air navigation service providers – those of Spain (ENAIRES), Germany (DFS), the UK (NATS) and the Netherlands (LVNL), with Indra as the technology partner. The value realised by the customers and Indra generated a compelling case to expand further the perimeters of the collaboration, in March 2015.

Beyond the delivery and assured implementations into highly complex technical domains, the key success factors have been the adaptation of commercial and supply chain models in order to foster cooperative behaviours, as well as the investment in governance and processes for state-of-the-art relationship management across national boundaries. These applied practices are very much in line with BS 11000.

## European Collaboration for Air Traffic Management Systems

There are over 8.5 million flights in Europe annually with projections for flight movements set to double by 2020. Although airspace capacity has been increased by 80% since 1990, further demand can



no longer be met in the same way as it is today. As more aircraft take to the sky, Air Navigation Service Providers (ANSPs) face a huge challenge, which is changing both their old methodologies and the traditional way of working in isolation. iTEC is a clear example of how air traffic providers are responding to these challenges through more ‘collaborative working’ practices.

iTEC plays a very important role in the future vision of ATM. The collaboration started with the joint specification, design, development and testing of the Flight Data Processing system (FDP). This is one of the most complex subsystems within air traffic management, feeding and receiving a large amount of data and providing controllers with necessary information about the given state of air traffic. Indra is one of only a few global corporations with the expertise to build these complex systems.

The goal of the collaboration is to develop a high-end air traffic management system for busy and complex airspace that meets future European requirements and enables significant steps forward in productivity. iTEC’s achievements provide a platform for synergies and thus cost reductions, helping to realise the vision of a SES with greater

efficiencies and service standards for Europe's airspace users. It is a sophisticated, layered collaborative project both between the customers and with Indra.

This next generation FDP system will replace the existing systems commencing 2015. iTEC will provide benefits essential to its air navigation customers by:

- enabling evolutionary capacity growth to cope with future traffic demands.
- reducing maintenance costs and the inherent risk of existing legacy systems.
- forming the basis for interoperability and advanced functionality which will enable them to be key players in Europe's Single Sky future.

## How the Collaboration Works

The core iTEC product is common across the ANSP partners, which allows for the exchange of knowledge at this early stage, and the advantage of cost sharing between the ANSP partners in the future once iTEC is operational. At the same time, each iTEC system is tailored to meet the different needs of each ANSP, to match their legacy systems and infrastructure.

It is only through exceptional co-operation and trust that it is possible for the various parties to access the benefits of collaboration. Indra and its customers are all working together by sharing knowledge, seeking to standardise requirements and wherever possible share costs, on this complex and technically demanding work to build the next generation of ATM systems.



## Wider and growing Collaboration

On 10 March 2015 executive members of the iTEC collaboration signed a formal agreement extending the technical and commercial parameters by committing to conditions for developing a common iTEC Controller Working Position (CWP).

The extension of the collaboration recognises its success in developing the FDP system together and more recently agreeing the common specifications for the CWP, while maintaining interoperability with other European air traffic management systems.

Furthermore, with the success of the iTEC collaboration, other significant European ANSPs are now also interested in joining the group. iTEC is also being offered outside Europe with several Middle East customers.

## The Benefits of Collaboration

The long term benefits of a successful collaboration is that over time Indra are able to improve their efficiency in delivering iTEC and apply their capabilities to developing other solutions for the ANSP partners. Improvements deliver better value to customers through economies of scale, optimum risk transfer and more effective working practices, whilst improving Indra's capability, revenues and reputation. Materialisation of these benefits is contingent on effective co-operation and associated complementary behaviours, put into effect through the way the parties manage their relationship.

A range of mechanisms ensure that the customers are able to realise value for money for both immediate and future commitments, as well as creating a mutually beneficial relationship: examples include benchmarking against existing competitive levels, as well as for future competitive alternatives, and performance metrics to maintain agreed performance and with the potential to incentivise future improvements.



Indra is a leading information technology company operating in Defence, Infrastructures and Service sectors, with a turnover of €3,000Bn p.a. and 40,000 employees. Indra's portfolio ranges from consultancy, project development, systems and applications, integration, through to outsourcing of IT systems and business processes. Indra is listed on the Bolsa de Madrid and is a constituent of the IBEX 35 index.

# Collaboration brings benefits to nuclear decommissioning

**Samantha Dancy, NDA**

## The Nuclear Decommissioning Authority

The NDA is a Non-Departmental Public Body (NDPB) set up under the Energy Act 2004 to ensure that the UK's historic civil nuclear sites are decommissioned and cleaned up safely and efficiently.

The 17 sites are located all across the UK and include the first generation of "Magnox" power stations (all but one of these have ceased generating electricity), various research and fuel facilities and our largest, most complex site, Sellafield. We are responsible for drawing up the overall strategy, setting targets, allocating budgets and measuring performance, while on-the-ground activities are delivered by four Site Licence Companies, or SLCs, which manage the work at individual groups of sites.

In addition to decommissioning, we are tasked with implementing government policy on higher activity radioactive waste, and the UK's low-level waste strategy. We also provide advice on the decommissioning plans for current and planned nuclear power stations.

Our annual budget is around £3 billion, with two-thirds allocated by the Government and the remainder generated by our own commercial activities, such as the reprocessing of spent nuclear fuel and electricity generation. One of our key aims is to provide the taxpayer with value for money.

By collaborating on certain procurements, the Nuclear Decommissioning Authority (NDA) Estate saved over £60m last year.

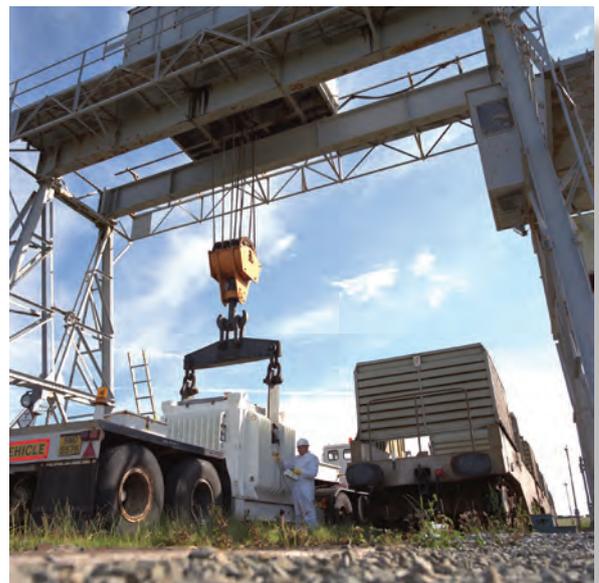
With 17 sites, 'Collaboration' is a word that's used frequently within the NDA Estate and covers a multitude of activities, whether it's working with suppliers, across departments or with the Site Licence Companies (SLCs) who manage our sites. None of the SLCs or the NDA has yet taken the plunge to bring these collaborations under BS 11000 certification, but there is interest in doing so in the future for some larger projects.

One place where there is true collaboration is within the Shared Services Alliance (SSA). The SSA brings together the commercial heads of our four SLCs, NDA and its subsidiaries, together with Westinghouse, which operates the Springfields site and the National Nuclear Laboratory. There is an additional focus on creating closer links with the Crown Commercial Services (CCS) and, potentially, increasing the participation from other Public Sector clients.

The SSA's vision is to have its industry leaders working together to identify, develop and deliver value and improve performance across the NDA Estate and across the public sector.

With an overall budget of around £3bn per annum, the NDA Estate spends significant sums of tax payers' money in the supply chain – £1.75bn last year. Of that total expenditure, 23% was subject to collaboration: a figure that has been increasing

steadily over the years. In the main, savings have been derived from collectively awarding contracts for goods and services that were previously subject to individual contracts by sites or SLCs. Over the last five years, the SSA's portfolio has grown by over 200% and now covers some 60-plus commodities and services. The programme now builds on the Estate's considerable success and starts to move beyond simple aggregation into standardisation and other areas which have the potential to deliver much wider benefits.



*Spent nuclear fuel flasks leaving Sizewell en route for Sellafield, where the contents will be reprocessed.*



*Harwell, which is in an advanced state of de-commissioning.*

In some instances, such as management of Low Level Waste, savings are due to using the supply chain to deliver new services for managing this material, which has low levels of radioactivity and has generally been consigned to the UK's single repository in Cumbria. Alternative options now include metals recycling, super-compaction and thermal treatment.

Once a requirement is identified as a Collaborative Procurement (CP), a 'lead' is identified from the SSA members. The CP lead creates a team from both commercial and technical representatives from the participating organisations and drives the procurement through its various phases and approval processes. Having a collaborative approach to the procurement means that the requirements of all the diverse participants can be addressed in the most effective manner – whether that means lotting, establishing appropriate baskets of goods or approaching on a regional basis.

The SSA does not focus solely on collaborative procurement. It has also developed a strategy that looks at other areas where increased commercial collaboration could benefit: use of assets, simpler and more standardised processes, sharing of knowledge and experience, approach to cross-Estate supply chain management as well as optimised procurement.

When creating its strategy, the SSA also took account of feedback from a wide range of suppliers

who contributed to an independent report into the health of the supply chain. The report, based on the views of more than 200 businesses, recommended a number of areas for improvement including a need for less red tape, greater clarity in specifications, and improved access to tendering opportunities.

Successful initiatives so far have been standardising and simplifying the pre-qualification process, and bringing all of the SLCs onto a single platform for tendering activities. This provides one place to find opportunities across the NDA Estate with a direct link to advertising opportunities on HMG's Contracts Finder. Similar to collaborative procurement, such initiatives are carried out by a team of people from across the SSA members to ensure that knowledge is shared and that consistent processes are implemented across the Estate.

Commercial directors of SSA Group members meet on a regular basis to discuss areas for future collaboration and to consider new ways to support the core nuclear mission, as well as, increasingly, the wider public sector challenge including: Funding, and the Growth and SME agendas.

The SSA has now moved on from being a simple buying club to being a key collaboration tool in the delivery of our mission.

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# Collaborative working methods

Sweett Group applies collaborative working philosophies throughout the business and through its project delivery behaviours

Overground:  
for longer trains



image reference: LOCIP 2014

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[www.sweettgroup.com](http://www.sweettgroup.com)



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# Collaborative working methods form an essential part of everyday life at Sweett Group

**Douglas McCormick, Sweett Group**

Sweett Group is an independent global provider of professional services for the construction and management of building and infrastructure projects. Services include quantity surveying / cost management, project management, building surveying and a wide range of specialist and advisory services. The Group is heavily positioned in infrastructure, public and private industry sectors.

## CASE STUDY – Collaborative Working played an essential part in the success of the LOCIP Programme

### Overview

The London Overground Capacity Improvement Programme (LOCIP) was developed by Transport for London (TfL) to address the rapid increase in passenger numbers using the London Overground network. Sweett Group was engaged by TfL to provide full pre and post contract commercial management services, development of procurement and contracting strategies as well as risk management, change management and stakeholder management and the negotiation of 3rd party agreements.

### Early involvement

This programme was highly complex - so fostering a culture of trust with the client and stakeholders was an essential element of the project success. Early appointment by TfL allowed us to challenge traditional procurement behaviours by enabling early collaboration and innovation within the whole supply chain – client, designers, commercial, tier 1 contractors, and tier 2 suppliers. The collaborative intent was devised to engage early market involvement that could produce time and cost savings and encourage innovative thinking to help design, plan and deliver the work more efficiently than would traditionally have been the case.

To achieve the client's objectives, the team understood innovative collaboration and a sense of collective responsibility needed to be at the heart of LOCIP's execution plan. We engaged proactively and focussed directly on the client's core challenges and listened to feedback to deliver a scheme that enhanced the business case benefit. We also concentrated on the social value of the scheme, not just the cost to build.

Combining our extensive rail experience together with our ability to create collaborative teams embedded within the client organisation, Sweett Group was able to ensure constant and proactive support to TfL and the project team and to provide the necessary hands on commercial leadership that such a demanding programme required.

### Common processes and tools

Processes and tools supported the development of the collaborative culture such as shared information platforms, open book reporting and costing, leaner working processes, waste elimination and commercial arrangements that facilitate collaborative working. Collaborative working on LOCIP was supported with robust governance and assured processes which satisfied the protections and responsibilities required by TfL's corporate governance regimes.

Sweett Group introduced 'Best Practice Forums' onto the LOCIP Programme which were held regularly at key stages throughout the project. Depending upon the phase of the project, then the participants may vary. These have generated many new initiatives to support and enhance the existing value added initiatives that have been developed from previous projects and now form part of our core service. These activities are planned and incorporated into the Project's Delivery Plan.

### Measurements of performance

A robust performance measurement regime around KPI's was vital to implement from the start of the project, so that overall performance and team effectiveness could be monitored and managed,

with interventions made promptly before a potential problem could arise.

In terms of Sweett Group's business growth, it is imperative for us to measure our effectiveness, test our commitment, challenge our way of thinking and test the degree to which our values, including collaborative working, were embedded within the project team and stakeholders.

### Long-term relationships

Approximately 70% of our client base is made up of repeat business. Much of this success comes from working collaboratively with the client early on to help understand and define their long term requirements.

We are now working with our clients to create relationships that set expected standards of delivery, encourage transparent performance reporting and challenge us to improve our service



through continual improvement. We are embracing the use of Client Relationship Management plans as a means better to define and codify our client relationships. This is working particularly well with TfL, where we review our performance at monthly review meetings and share the key findings and lessons learnt across our Infrastructure projects.

**Sweett Group was appointed by Network Rail commercially to deliver the £5.5bn Thameslink Programme. As part of our appointment, we were asked to help develop Network Rail's 'Collaborative Working Strategy'. The Collaborative Working Manual sets out to explain how Network Rail intended to develop effective Collaborative Working throughout its programme of works. The Collaborative Working Manual is still in use today and Network Rail has successfully delivered major phases of the work through this collaborative approach.**

## CASE STUDY – Designing and Delivering an Apprenticeship Programme

Sweett Group Europe launched an apprenticeship programme to complement our established graduate recruitment and other development schemes. The design of this programme necessitated a collaborative approach, working with external and internal stakeholders to create a programme that presented the best learning experience for our apprentices.

### External Partnerships

For the programme to be successful, we needed to understand the requirements of our stakeholders

across all of the sectors and regions in which we operate. This had to be carefully balanced with our long term strategic plan to ensure an equal platform for all people. Our HR department coordinated a number of 'think tank' workshops to discuss and test ideas before agreeing a shared vision for the programme. This collaborative approach saw us identify a number of external organisations to partner with:

- **The Construction Industry Training Board (CITB) / Havering College** – The CITB and Havering College were carefully selected external suppliers that provided us



with an educational platform and pastoral support for our apprentices.

- **Modus Magazine** – In order to publicise the apprenticeships to the most relevant audience we partnered with the RICS publication “Modus magazine” to conduct an interview and highlight our scheme in more detail.
- **TIME FM** – Our collaboration and “think tank” workshops highlighted that our London apprenticeships needed further promotion. As such we arranged for our HR department to speak on air, with Time FM, to explain the apprenticeship programme to their listeners.

### Internal Collaboration

In addition to the “think tank” sessions, it was essential to have effective communication, co-ordination and collaboration in the delivery of the programme internally.

- **Rotational Job Roles** – A “work rotation” system of four placements lasting six months giving exposure to different sectors, different ways of working and different teams within the business.

- **Shared Learning Experience** – Bi-monthly training sessions, delivered as a cohort, fostered collaboration between the apprentices, as they built a peer group and an extended business network.

Stephen McGowan, one of our apprentices in London said *“It’s been a fantastic experience so far working for Sweett Group. We have been lucky enough to be on a rotation scheme, doing six months in each sector of the company over the two year duration. Since the day I joined I have learnt so much by speaking to people about their job roles, projects and past experiences in the construction industry: people are always on hand with advice for me”.*

NOTE: Case Studies provided by Eryl Evans, Head of Infrastructure, Sweett Group and James Grinnell, Head of HR Europe, Sweett Group

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## Driving in the same direction

### Andy Davison, Xchanging

Xchanging uses the ICW's collaborative working model in a programme of solutions delivery for the Society of Motor Manufacturers and Traders (SMMT). It's a working relationship that's been developing for two years and, as we continue to collaborate and refine the project and programme management approach we've built out of the model, we hope it will continue to develop for many years to come.

Like most companies we've long since strived to achieve partnerships with our customers, suppliers and between our own divisions. The methodology behind the BS 11000 standard for collaborative relationship management gives us a framework that suits us well. Having enjoyed successful project delivery with the SMMT we were very happy to be granted BS 11000 certification in October 2014.

### Collaborative working

Xchanging provides business processing, technology and procurement services to companies around the world across a broad set of industries from education to insurance, from financial services to automotive.

We believe that to collaborate successfully, businesses need fully to understand the benefit both parties gain from working together. On this foundation they can build the goals for which they wish to aim and the objectives that will get them there. It's important that both sides agree and understand how they will work together to be successful.

Roles and responsibilities need to be agreed early on and points of contact into each organisation kept to a manageable few. A single point of contact might not be achievable, but it needs to be clear who does what and the communication channels the teams will use for smooth project management.

Flexibility of delivery in this ever-changing business environment is a must. This doesn't mean requirements can be ill-defined, or that projects shouldn't work to structured touch points with documented progress tracking, but it does

mean that the capability to flex, evolve and tweak delivery should be built in from the outset.

In large companies, it's as much about collaborative working within the organisation as it is between organisations. Clients expect this, and so they should but it doesn't necessarily happen automatically. In many ways it can be harder. Across divisions co-workers need to treat deadlines and actions as they would if they were delivering to an external customer.

### Partnership

Our approach to working with the SMMT was to generate a partnership from the start. We see the ideas generation and delivery capabilities we put into our work with the client as an investment in their business and ours.

Working to the collaborative model has helped us overcome challenges we encountered during the project. A fundamental difference – that sets the model apart from traditional programme management approaches – is that the contract is not relied upon slavishly as the foundation for delivery.

Flexible tweaks and changes to the delivery plan are accepted as inevitable. They are discussed, explored and managed through change requests without the need to defer always to the contractual agreement.

So additional prototypes could be agreed upon as beneficial to the project by resulting in an overall shorter development time. The emphasis isn't on the original number of prototypes that were agreed, it is on reaching the end goal – together! It is this mind-set – this viewing of everything within the wider context of the overall objective rather than just within the scope of each individual request – that is the essence of the collaboration Xchanging and SMMT enjoy.

## CASE STUDY

### Collaborative working with the SMMT

#### The customer

The Society of Motor Manufacturers and Traders (SMMT) – one of the largest and most influential trade associations in the UK – supports the interests of the UK automotive industry – an industry that invests nearly £2 billion a year in research and development. Over 2.5 million new vehicles have to be registered every year and the database of these – the Motor Vehicle Registration Information System (MVRIS) is the SMMT's flagship service feeding a number of SMMT reports that provide market and trend insights used to inform decision making.

#### The project

Xchanging's task is to design, develop, deploy and host the replacement solution to the legacy MVRIS system. The challenge is to make it easier to use, faster to operate and to take out some of the manual processes needed to produce reports. Additional functionality is being added and it needs to support access from mobile smart devices.

#### Collaboration

The way of working – the approach to programme management and project delivery – was important to the SMMT. It wanted a partner prepared to work flexibly and to adapt delivery during development as requirements evolved, while taking on board learning throughout the process.

The BS 11000 standard for collaborative relationship management model met the need perfectly. The fresh new approach made Xchanging stand out and assured the SMMT of world class service and relationship management.

#### The Xchanging approach

1. The ICW ran the workshop for us that kicked off the project. This successfully established how collaborative working would benefit the project
2. Next, we put in place a Relationship Management Group which identified ten joint business objectives over a two-year period

3. We established monthly meetings that tracked progress against the objectives, explored how ideas for improvement could be shared, how further innovation could be brought to bear on the project and how the two companies could work together to achieve the business' aims beyond the scope of the MVRIS project
4. An eight-stage approach was taken to managing the programme. The stages included defining how the collaboration would work, managing the relationship and delivering the desired outcomes. The application of these stages to the programme's objectives and deliverables was defined and managed through the Relationship Management Plan
5. Throughout, Xchanging has consulted with the SMMT's customers of the MVRIS service and collaborated cross-division through working groups that share ideas and issues.

#### The outcome

The new MVRIS is due to launch next year. Working collaboratively to the standard has benefited the project through:

- **Divisional cross-working** – capabilities from multiple lines of Xchanging's business were brought together
- **Ideas sharing** – the pooling of ideas encouraged inputs at all levels of the management structure
- **Customer input** – a critical part of the process early on and throughout the programme
- **Building trust** – consistent, minimal programme points of contact built a trusting, open relationship for a successful working partnership
- **Flexibility** – a flexible, agile approach to development and delivery meant the emphasis was on the right thing - partnership success rather than the rigid adherence to an early list of deliverables.
- *For more information visit [www.xchanging.com](http://www.xchanging.com).*

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# Helping Britain prosper – collaboratively!



**Jackie Jenks,  
Lloyds Bank**

Collaboration is at the very heart of Lloyds Bank's work to help Britain prosper.

As an organisation that is committed to backing British business, we recognise the need to provide our customers with more than just traditional banking facilities like loans and overdrafts.

That's why enterprise mentoring has been a key initiative for us since 2011, and we have seen first-hand the transformative effect that working collaboratively with SMEs can have for their businesses – from startups looking to grow to established firms.

Our Enterprise Mentoring Scheme was set up in collaboration with the Business Finance Taskforce which includes the main high street banks, the British Banking Association and the government department for Business, Innovation and Skills with the aim of helping the economy return to sustainable growth.

We do this by training our colleagues with the Small Firms Enterprise Development Initiative (SFEDI) to share their skills and experience with entrepreneurs. SFEDI is dedicated to bringing enterprise 'know how' to enterprising people across the UK and believes in nurturing the entrepreneurial spirit – as do we.

Then we work alongside a number of established mentoring organisations across the UK who match our trained mentors with enterprises seeking support. These organisations have all met the national standards for mentoring and are listed on the national mentoring portal [Mentorsme.co.uk](http://Mentorsme.co.uk)

We have recruited an exceptional breadth of volunteer mentors from across Lloyds Banking Group – from senior management to specialist finance experts.

More than 400 of our volunteers have so far been trained to become an enterprise mentor and been

paired with a business in their local area – more than any other bank involved in the Enterprise Mentoring Scheme.

They hold regular meetings with mentees, where they use their skills and experience to help guide and support their development and growth.

While it is fantastic to see young businesses gaining so much from the mentoring scheme, as an organisation we have also felt great benefits internally.

Since our involvement with the initiative began, we have seen a substantial uplift in self-development amongst our mentor volunteers, who gain great satisfaction from adding value to the enterprises they are supporting.

All tell us that they feel they have learnt so much themselves and are inspired by the work. Many of our head office staff have said being able to directly interact with businesses in a new way has helped them to gain extra insight into the realities facing the country's enterprises. This is something that they can transfer back into their day-to-day jobs, and ultimately helps us as a bank to better understand our customers and tailor our services to them.

It's clear to see that mentoring is an effective way to help support businesses at all life cycle stages and there are many tangible benefits for mentees and mentors alike.

As an Enterprise mentor myself, I know how rewarding it is to have helped an entrepreneur towards achieving their true potential. It is both rewarding and a unique form of self development that I always encourage other business professionals to get involved with.

As a bank, we are passionate about supporting business and are proud of the impact we have achieved for SME by working in collaboration with so many different partners.

To find out more about Lloyds Bank's mentoring scheme visit <http://resources.lloydsbank.com/business-guides/managing-a-business/mentoring/> or to volunteer to become an enterprise mentor yourself visit <http://www.mentorsme.co.uk/>

[Jackie.Jenks@lloydsbanking.com](mailto:Jackie.Jenks@lloydsbanking.com)

# Collaborative working in construction

## Don Ward, Constructing Excellence

UK construction has come a long way in the last twenty years. It is 70% safer, clients are 30% more satisfied, and the sector is responding to pressures on carbon. This is particularly true at the leading edge where big repeat clients, including many in the public and utilities sectors and their suppliers are more mature in their understanding of risk. In particular, in procurement speak, construction is usually "high risk-high value" and thus needs to be procured in such a way as to enable collaborative working.

The start of this change were the Latham and Egan reports of the 1990s. These were driven by client concerns about the impact on the performance of their core business by the inefficiencies and waste that were so prevalent in the construction industry. As an academic friend recently observed, the sector must be the only one which usually competes to deliver the same thing for a client

rather than something different – plus its dominant business model and procurement routes too often incentivise conflict throughout the supply chain.

The need for collaborative working is the common theme running through this change agenda. We need to improve trust, foster a collaborative culture and eliminate adversarial relationships, and sort out processes such as early involvement, selection by value, common processes and aligned commercial arrangements.

Sound familiar? Our sector has always benefited from the fact that several industry sectors in the UK adopted partnering techniques before construction, notably the oil and gas sector with CRINE, manufacturing (notably Rover with Honda and other Japanese car transplants), and retail. These industries' experiences influenced the adoption of partnering techniques in the construction industry,

and provided lessons for us to learn and so avoid some of the early pitfalls. Their experiences also directly influenced the learning which transferred from their core businesses (manufacturing, retail etc) to the procurement and operation of their own built facilities (which are required to enable those core businesses) – thus the supermarket retailers were some of the earliest clients of the construction industry to adopt partnering: hence the value to our sector of the Institute for Collaborative Working, enabling a cross-sector transfer of knowledge and learning.



In our vision of construction by 2025, supported by the government's industrial strategy for the sector Construction 2025, with ambitious targets for improvement of between 30-50%, the key headings are People, Smart, Sustainable, Growth and Leadership. Getting there means collaborative working, the journey includes respect for people and digital technologies to enable lean to deliver value. We are at a crossroads in industry improvement and, although the sector is coming out of recession, an era of relative austerity and serious pressures on client budgets is ahead of us. Collaborative working has never been more important, and I look forward to working closely with the Institute to move us forward more quickly.

*The author is Chief Executive of the not-for-profit Constructing Excellence, the single organisation driving change in construction. The Institute and CE have reciprocal membership.*

## One into 36 does go. Eventually!



**Carolyn Williams,  
Institute of Risk Management**

On the occasion of its quarter century, I must salute ICW's founders for their ambition. The Institute of Risk Management is keenly aware that collaboration is a concept often celebrated more in aspiration than in deed.

IRM's first, but hopefully not last, experience of working with you was on our Extended Enterprise guide for risk practitioners last year.

Extended Enterprise is one of those phrases – like 'mortgage-backed securities' or 'event horizon' that's tricky to explain but, once understood, is never forgotten. Essentially, it describes the network of systems, processes, people, systems, etc involved when a number of organisations come together to achieve what they couldn't achieve on their own.

It proved a perfect metaphor for the process of producing the report itself. With 36 experts contributing to fifteen separate chapters, deadlines came and went with a regularity that was probably inevitable with so many individuals involved. The ICW, needless to say met all our deadlines without sacrificing an iota of quality.

David Hawkins' chapter in the guidance 'Relationship risk management: perception or pragmatism' adeptly demonstrates ICW's 'Outside in' theory. As he points out, it's now generally accepted that 60%-80% of most companies' operating costs lie outside their own organisations. Yet as many as 80% of mergers and partnerships either fail to deliver their full potential or fail completely. Add to this what ICW terms 'perception based economics' – where the asset/assumption value-ratio is weighted to the latter – and it's clear that intangibles, which so often depend on the performance of extended networks, are now critical to organisational success.

Collaboration is the new buzzword, and successful collaboration depends entirely on relationships. Yet, as David points out 'the one aspect that is seldom mentioned in any risk brief is that associated with relationships'. The disproportionate focus on contractual conditions and liabilities gives the illusion that success is a question of risk managing contracts, when the reality is 'that once the contract is invoked failure is largely assured.' How well these relationships work used to be largely a matter of perception. BS 11000, the world's first Collaborative business relationship standard, created a framework which can be used in *any* context where relationships are known to be a significant factor. This standard is a perfect fit with IRM's enterprise-wide approach to risk management, which can be paraphrased as relevant to 'any role, any sector, any region'.

I'm always pleased when the strands of standards work being undertaken by different organisations come together. Despite the organisational difficulties of putting together our *Extended Enterprise* guidance, the final product is a genuinely leading-edge guide that covers bases never covered before in such an integrated way.

IRM will be launching its certification scheme for members this Summer. It will include the kind of behavioural standards of which I trust the ICW would approve. Their participation in helping IRM raise standards of professionalism in risk management is, I hope, just beginning.

*Carolyn Williams is Technical Director at the Institute of Risk Management. Extended Enterprise: Managing risk in complex 21st century organisations is available at [www.theirm.org](http://www.theirm.org)*

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## *Moving from black and white to the "best shade of grey"*



***Kathleen Molan, Warwick Business School,  
University of Warwick***

Warwick Business School (WBS) takes an innovative approach to leadership by bringing Shakespeare and classical dilemmas into the business school environment.

Professor Hari Tsoukas (our expert in Leadership and Organisational Studies) argues that there is no blueprint on how to be a leader noting that it involves more than just an analytical mind as human affairs are not straightforward. His 'Leading Wisely' programme uses live issues and scenes from literature to explore the complex challenges that leaders encounter. Greek and Shakespearean tragedy, the life of Nelson Mandela and modern-day scenarios all provide powerful supporting material.

Alan Thomson, Director at engineering consultants Arup, believes using historic and classic literature as live cases provides some appropriate distance to look at timeless leadership issues with fresh eyes. He says "I enjoyed the drawing out of examples in both classical and contemporary form: the classical situations often brought lessons which are as relevant to the art of leadership as any modern examples. I enjoyed the emphasis that leadership is about finding the best shade of grey rather than expecting to find either black or white".

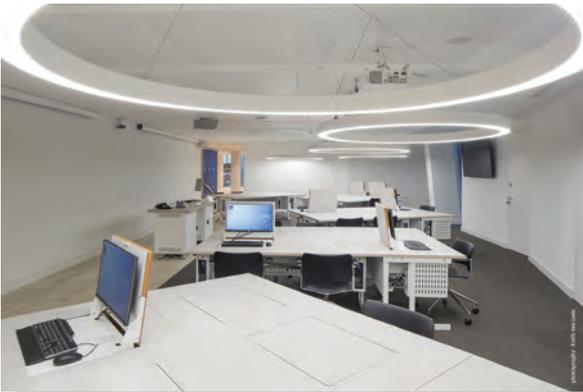
At WBS, we pride ourselves on our innovation as well as our world-class research and understanding of contemporary problems. We are about doing things differently and the value of our research is to have real business impact. To share this potential for improving performance Warwick is now running

programmes at its new campus based in the Shard in London.

We believe that collaboration is of central importance to the competitive advantage of an organisation. The introduction of BS 11000 has greatly contributed to the debates around collaboration, but there is still limited understanding of what constitutes successful collaborative relationships. There is much to be learned about how to manage these relationships successfully. A team from WBS, led by Dr Mehmet Chakkol is conducting a research project on behalf of ICW focusing on benefits realisation through interviews, workshops and a large scale survey to inform understanding of the current and potential state of collaborative working in the UK and beyond by identifying historical examples, best practices, key challenges and trends. His research has already identified the following myths about collaboration:

**Myth 1: Collaboration is a trend:** Some suggest that collaboration is a fashionable and short term concept. However evidence indicates the opposite. There is a rising trend in industry to increase collaboration vertically or horizontally and even with competitors. In fact various objective measurements indicate that we will see more collaboration across various industries. Collaboration is here to stay so we need to learn more about how to manage it successfully.

**Myth 2: Collaboration is costly:** This may be true initially as there will be administration and technology costs, and investment in man-hours



and infrastructure. However in the longer term successful collaboration will result in greater innovation, project success, reputation gains, greater business acumen and access to new resources. Organisations do not exist in isolation so they need to adopt a long term strategy to build collaborations and to pool knowledge, skills and experience in order to achieve better value and financial gains.

**Myth 3: Collaboration is always profitable:**

Recent figures show that more than 50% of services outsourcing contracts are terminated before the end of the contract, whilst mergers and acquisitions suffer a failure rate of about 70%. Failed collaboration is in fact very costly. To prevent this, the best collaboration agrees an appropriate exit strategy for the parties involved early on in the process, recognising the positives and negatives. To achieve this, incorporate planned 'reviews' in the course of the collaboration and clearly specify how the end goal could be reached by breaking it down to important milestones.

**Myth 4: Collaboration is a polite activity:**

A good collaboration requires some friction in order to have an open and trusted conversation especially at the start when the parties involved define their goals and objectives. Study after study shows that trust is a key factor for any type of strategic collaboration – but too much trust can easily yield negative results. Research shows that investing in a collaborative relationship positively affects the inter-firm performance, but if taken to an extreme it can either reduce objectivity in decision making or increase the opportunistic behaviour amongst parties. So a balance must be struck between trusting one's partner to allocate appropriate resources (and taking appropriate precautions) and remaining open minded about business opportunities.

**Myth 5:** Collaboration is amongst organisations not individuals: While organisations increasingly tend to implement strategies and practices to institutionalise organisational relationships, our research shows that individual relationships play a key part in successful collaborations.

**Myth 6: Collaboration does not require skills:**

it is just a part of daily business: A debate persists about whether skills can be nurtured or are just natural; it is quite obvious that there are certain common and valuable interpersonal skills that could contribute to the successful delivery of collaborative projects. A good collaboration starts with empathy and mutual understanding of different management and leadership styles. Internationally an awareness of different cultural practices is crucial. To achieve a consistent interface across different collaborations targeted training is recommended to develop employee skills and behaviours. This could be internal in the form of knowledge and experience exchange or external in cross-industry platforms - all supported by coaching and mentoring.

Myth 7: Collaboration is not a supply chain issue: No business is an island and every organisation is part of a supply chain. The supply chain implications can have significant impact on the performance of the organisations involved. But although supply chains are integral to business, we only have a limited understanding of their influence on collaborations. For instance, a collaborative project with a new customer will result in further collaboration with other partners and suppliers and better internal communication. Thus a supply chain view of collaboration is essential.

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# Collaborative leadership – a new post-graduate opportunity

**Paul Connor, Warwick Manufacturing Group, Warwick**

Starting in 2012 the Institute of Collaborative Working and WMG (Warwick Manufacturing Group) at the University of Warwick have been successfully progressing together toward a pathway of postgraduate qualifications for ICW members and other global organisations across a range of industries.

Dr Paul Connor, as author and module tutor of the new postgraduate 'Reputation and Relationship Management' module, recognised the benefits associated with BS11000 and asked David Hawkins of ICW to deliver a series of sessions for full-time and part-time MSc students. Enthusiastic reviews of the associated academic and practical outcomes over the past two years of module runnings led to the realisation that the topic was a key area for future development. The module's success combined with the worldwide movement toward increasing levels collaborative governance, provision and approaches fuelled the imagination of David Hawkins to explore the ingredient of leadership in shaping and implementing collaboration agendas and delivery.

A new module entitled 'Collaborative Leadership' was authored by David Hawkins. In the true spirit of collaboration 5 academic subject specialists from WMG, 18 individuals from ICW member companies along with input from 3 guest speakers, from 2 industry case study presentations, participated in a soul-searching pilot during 23rd-27th February 2015 in order to shape the course before its general release. The input was most pleasing as all concerned considered issues such as: what is collaborative leadership taking into account both its advantages and difficulties, when is collaborative leadership deemed to be appropriate, who are collaborative leaders and how is collaborative leadership practised and measured.

Seminal outputs from the collaborative leadership pilot centred on the identification of two specific characteristics. First it is not about the leader deciding what to do and instructing others to carry out the tasks, rather it is about the leader helping the group to focus on the task after they have decided collectively what to do about the issue they face i.e. leadership of a collaborative effort. Second

leadership can change, by group decision, from one person/organisation to another as different talents or capabilities are called for or even leadership can be permanently shared by all or several members involved in the collaboration i.e. leadership as collaborative effort.

As a result of incorporating the constructive suggestions about amendments, refinements and enhancements received in feedback from the pilot, ICW and WMG have agreed to two additional module run dates thus sending a positive message to the ICW community and other global organisations. Work has already started on exploring the possibility in the near future of an ICW/WMG badged 3 module PGA in Collaborative Leadership & Change. As delegates progress through their careers they will be able to upgrade their PGA to a PGC in Collaborative Leadership & Change through the addition of three more modules and completion of a work-related project.

WMG was founded by Professor Lord Kumar Bhattacharyya in 1980 to help reinvigorate UK manufacturing. From its inception WMG's mission has been to improve the competitiveness of organisations through the application of value adding innovation, new technologies and skills deployment, bringing academic rigour to industrial and organisational practice. The Group has grown into an international role model for how universities and business can successfully work together, with Professor Lord Bhattacharyya continuing to lead as Chairman of WMG.

WMG's education programmes attract students from across the globe who recognise and value the approach to research and impact driven education. Strong links with industry enable WMG students to understand in detail what will be expected of them when working in the global economy. Professionals from a wide range of sectors recognise that WMG's unique combination of experience and academic excellence will elevate their career to a higher level. WMG was delighted to be awarded the Queen's Anniversary Prize for Higher and Further Education in 2009.

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# Collaborative working is the strategy for economic growth in Wales

**Jane Lynch, Cardiff Business School, Cardiff**  
**Robert Meakes, ICW, Wales**

In October 2013 the Welsh Government Finance Minister – Jane Hutt AM launched the Joint Bidding Guide designed to promote collaborative bids from mainly smaller Welsh companies and underpin the strategy of strengthening the Welsh economy through collaborative working.

In parallel the Institute for Collaborative Working in Wales has worked closely with Cardiff Business School, Cardiff University to develop and deliver a training package designed to equip small businesses and public sector buyers to apply the principles of BS11000.

Both the Institute and Cardiff Business School were represented on the Management Board and Steering Group that piloted the Joint Bidding Guide through successful initial evaluation and adoption.

Some exciting new projects are now set to embrace BS 11000 as a common standard.

We are looking forward to working with the tidal and wave energy developers in West Wales who are carrying a demonstration of some very new and innovative technologies to harness wave energy and tidal currents.

The widely publicised tidal lagoon in Swansea Bay is moving towards the construction phase supported by Construction Futures Wales who are involving a number of smaller Welsh businesses working in collaboration.

This year has seen the opening of the new £13.5M Postgraduate Teaching Centre at Cardiff University which is now home to our series of training courses "Grow through collaborative working – Effective implementation of BS 11000" delivered by Jane Lynch on behalf of Cardiff Business School



The Institute for Collaborative Working in Wales has adopted a new training base in the Conwy valley at the Plas Maenan Hotel where we can offer accommodation to delegates from outside the local area at the same time as providing an excellent training environment.

2014/15 has been a very productive year in terms of establishing important key relationships across Wales and developing our forward strategy to support the economy in Wales. We have seen examples of smaller businesses winning valuable tenders and contracts through structured collaboration – sometimes beyond their expectations.

The roll-out of the joint Bidding Guide has already started and is creating huge interest in BS 11000 from buyers and suppliers – the economic benefits are beginning to be realised with tremendous support from our Finance Minister and Minister for Economy, Science and Transport (Edwina Hart AM).

The Public Sector plays an important part in the Welsh economy as there are relatively few large organisations located in the country – so the adoption of collaborative working is delivering best value for the taxpayer as well as retaining a rising proportion of spend to take advantage of the "local multiplier" as the Welsh pound circulates.

2015/16 will be an exciting year marked by rapid growth in the application of BS 11000 as a core management discipline. Our close working relationship with Cardiff Business School, Cardiff University will continue to flourish and we anticipate further developments to our successful education programme in Wales.

Our new relationships and collaborative partnerships are yielding results that underline the benefits offered by the Institute to the whole community.

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# COLLABORATIVE WORKING AWARENESS TRAINING

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- Increased levels of innovation
- Enhanced competitiveness & performance
- More tenders awarded
- Improved cost & risk management
- Streamlined working
- Improved joint efficiency
- Active value creation



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# Are you aware?

**Steve Holmes, RT Training Solutions**



So, by now I'm sure that everyone is using the words, collaboration, partnering, working together, and even BS 11000 in our everyday language, but what does it all actually mean? My experience has shown that it is a little bit like saying, "I'm

flying off to a beautiful destination" but in reality, you're not doing the flying, someone else is, while you just sit there and watch a film with perhaps a drink in your hand. In fact, if someone were to sit you in the cockpit, chances are you wouldn't know where to start.

I have used this analogy to highlight the principle that BS 11000 and collaboration cannot be – and is not – the responsibility of 'others' and that everyone has a part to play. In our day to day business we constantly come across companies and individuals who use the language, yet have no concept of the structure and methodology of the Standard. Moreover, they seem to have their own interpretation of 'collaboration' – which is more often than not geared to their current ways rather than working to the guidance of the Standard. Continuation of this way of thinking will not realise the full benefits of collaboration, and could even be detrimental if a relationship were formed, only to discover that you don't actually know the principles of what you are there to achieve.

There is a firm belief that a level of awareness throughout a company will ease the journey towards BS 11000. Even if your company isn't looking to go as far as certification to the Standard, it is still beneficial to have a basic understanding of the eight steps of collaboration so at least when you use the terminology, you have awareness and underlying knowledge of what it is about. Back to the flight analogy for a second: if anyone has ever attended a 'fear of flying' course, he will know that, to overcome the fear, they walk you through the various stages during a flight, and what will be happening to the aircraft during those phases, engine start, taxi, take off, manoeuvring, and

landing. The premise being that if you have a basic understanding, then the fear and apprehension will diminish. Indeed, it can happen that you are so pleased with your level of understanding that you feel confident to counsel and influence others with your new found knowledge and confidence.

This approach in relation to collaboration is fundamental, and is a major contributor towards making the journey a success. The more people you can have with an awareness of the principles, then the more people you will have believing in the concept and the viability of their own contributions to making collaboration work. With this in mind, the ICW have worked closely with RT Training Solutions to develop an awareness course of the principles of BS 11000. The course is the only awareness course endorsed by the ICW and is designed to give delegates, of every status, an introduction to the eight principles for collaborative working. It will touch on each phase of the journey and make clear the defined requirements of each of the eight phases. Feedback about the course indicates that it is an inclusive and engaging way of learning about the Standard, in a more informal and less prescriptive format than that which will be required later in the journey. Referencing case studies and including 'real life' facilitated discussion, the course will also aim to align the principles and their relevance to particular businesses. It also concentrates on the cultural requirements needed for success, and the role profile needs for a new way of working.

It is recognised that there might be a resistance to adopt the Standard by some businesses as they feel that their particular business is either too small, too established, too set in its ways etc, but I remember back when the CDM Regulations were introduced and the reluctance by some companies to adopt them. The thinking was 'if I don't do anything they might go away', well guess what – they didn't. Many companies, (including the one I was working for at the time) suddenly found themselves non-compliant, which was business affecting. The mad scramble to put this right had a negative effect on the business, not only in financial terms, but also in reputational terms. Now I'm not saying that BS 11000 is in the same category, as it is not a regulation nor indeed mandated, but, it is forming

an ever increasing part of the tender evaluation process, with a higher score rating being applied for collaborative competence. Be under no illusion that cross industry supply chains are pushing the concept of collaborative working, and will look to favour businesses that show an awareness and a culture of collaboration, even if they don't hold certification to the Standard.

It is my firm belief that, in the current climate and with the recognised shortage of skills within all sectors of industry, the new way to secure a workforce and a customer base is to forge stronger relationships. A relationship built on trust, innovation, creativity and mutual benefit will go a long way towards 'keeping the ship steady'. But we all know that – don't we ??

I am always intrigued by the way that other earth dwellers often work together instinctively: no amount of collaborative training tells a flock of geese to fly in a certain formation, they just do

it because it is the most efficient way to fly - or dolphins who corral fish into a ball so they can feed. There are many more examples of this instinctive collaboration. But, for some reason, the most intelligent of species, the human being, often chooses to abandon these instinctive traits in favour of a more selfish, adversarial way of working – strange, don't you think, that we should feel the requirement to train to do what should come naturally?? This is a rhetorical question, as I'm not sure there is an answer, however, what is for certain are the results and benefits that can be realised through training and developing the right skills and cultures which act as a catalyst for collaborative success.

For further details about the 'Awareness of the principles and benefits of Collaborative Working' course, then please contact RT Training Solutions on 01473 242344.

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# Collaborative working on a global scale – an innovative approach

Garry Griffiths, RDC

**RDC is a UK based Information Technology Asset Disposition (ITAD) business specialising in the reuse and recycling of used computers. Having developed a successful UK business, customers urged RDC to provide similar services to their overseas operations and collaborative working with international partners around the world was chosen as the strategic means to achieve these aims.**

Using BS 11000 as a business model for collaborative working, RDC built a network of international partners that has delivered ITAD services in more than 130 countries. RDC's International Partner ITAD Network management system was BS 11000 certificated in 2014.

The traditional collaborative business model depicts one organisation collaborating with one or more partners with particular sets of skills – parts manufacturer, HR or professional advisors, for example.

What is innovative about RDC's approach is that RDC and Partners all provide the same uniform secure and environmentally responsible ITAD services in separate parts of the world.

RDC's International Partners each provides ITAD services to the best practice standard developed by Partners in collaboration. RDC acts as the executive partner, a single point of contact (or 'one throat to choke' as one customer colourfully puts it) and liaises with Partners to deliver ITAD services across the globe. RDC invoices clients and pays Partners for services delivered – "One for all, all for one" as M. Dumas put it so succinctly.

RDC had been working with some international organisations in an ad hoc collaborative way for several years. However, in 2013 our BSI client manager Paul Barrett suggested BS 11000 and

it quickly became apparent that this offered a synergistic solution to RDC's strategic plans.

Applying the CRAFT 8-stage collaborative relationship model recommended by the Institute for Collaborative Working for BS11000 appeared daunting at first – but it emerged that the model systematically described the way RDC had been working anyway! The CRAFT model helped RDC address gaps in our approach and sped up management system development.

**AWARENESS** – customers initiated this phase by asking RDC to support their operations in Europe, the USA and the Far East. Setting up business operations in separate countries takes time, expertise and significant start-up bankrolling resource costs that a small business such as RDC did not have. A quicker, more cost effective solution was to identify local ITAD businesses that could provide services similar to RDC using existing facilities, people, processes and tools. Partnerships also offer a more long term commitment than traditional vendor/ supplier contract arrangements. RDC's search for international partners began in earnest.

**KNOWLEDGE** – this phase involved RDC opening collaborative dialogues with possible partners to identify the key skills, competencies and resources needed to perform a basic level of ITAD services. Secure destruction of data using approved tools was key, with tracking and reporting on each device processed needed. Discussions built an ITAD specification of requirements for global operations.

**INTERNAL ASSESSMENT** – identified the people with the experience and skills needed to develop a network of international partners operating to best practice ITAD specifications. RDC formed an International Partner team from Service Sales, Sustainability and Service Delivery people. Product Sales identified trusted ITAD customer purchasers



and suppliers of used IT across the world as prospective partners.

**PARTNER SELECTION** – led to the development of a Questionnaire to gauge the competencies and capabilities of prospective International Partners based on Partner ITAD specification. SWOT analysis was used to develop improvement plans – many non-compliances meaning non-selection.

**WORKING TOGETHER** – produced the ITAD Toolkit comprising best practice processes suggested by RDC and Partners based upon our own experience. A register of ITAD legal and regulatory compliance requirements was also developed for each country in which the ITAD services are required.

**VALUE CREATION** – Added value arose from the extra business the Partner Network generated for all partners. Reciprocal ITAD services developed with RDC becoming the UK and European Partner for US and Australian Partners. Some Partners also offered value in the form of innovative specialist equipment such as a new degausser to erase data on hard disks to labelling components to confirm original parts had not been swapped for inferior replacements.

**STAYING TOGETHER** – Site audits, ongoing performance monitoring against agreed service levels and customer specified requirements and regular reviews all verify Partners' continuing compliance with the ITAD Network standards. Association with a BS 11000 certified international network also attracted ambitious partners aiming to grow.

**EXIT STRATEGY** – This was a new phenomenon added to Partner Relationship Management Plans. Initial concerns at "Why are we planning to fail?" were overcome by explaining the mutually beneficial reasons for this contingency planning.

Understanding RDC's innovative adoption of collaborative working into an international network of uniform ITAD service providers was not the only challenge faced by BSI's BS 11000 Assessor, Mark Fearon. Whilst assessing RDC's site in Essex, Mark had to conduct telephone interviews with

RDC's International Partners in Australia, Italy and the USA. All confirmed and enthusiastically supported the collaborative approach adopted – and certification was recommended.

RDC's BS 11000 certification also added a unique selling point in the competitive ITAD service area as no other competitor was seeking this. Business researchers Gartner added RDC to the 'Visionary' quadrant of up and coming ITAD players globally – attracting interest from global giant Arrow Electronics Inc who acquired RDC from Computacenter in February 2015.

Global businesses are now seeking global service providers and delivering best practice services globally is a challenge for business. RDC's independently certified BS 11000 collaborative International Partner Network reassures prospective service customers that their ITAD risks have been addressed and mitigated by an established, best practice business model.

**Global service providers take note – collaborative working and BS 11000 can help you too!**

RDC's ITAD services can be seen at [www.rdc.co.uk](http://www.rdc.co.uk)

[ggriffiths@rdc.co.uk](mailto:ggriffiths@rdc.co.uk)



*RDC's Technical Test Area for refurbishing IT*

# Realising the benefits of smart cities sooner



**Stephen Bushell from Mercato Solutions – a Probrand Group company, explores the realities of unlocking smarter cities.**

Depending on the country where you live or the sector you work in, the smart city concept can mean different things to different people.

A smart city initiative may offer one person the chance to tackle an urban energy crisis through the use of smart metering, while for another it may mean calling up a driverless car or offering ways to increase participation in the democratic process through better use of social media.

New digital technologies offer an endless list of opportunities for people in all walks of life looking to improve city living. With the predicted growth of the Internet of Things and the emerging analytical power of Big Data solutions, the potential for gathering further information and drawing actionable insights from these digital technologies is a great prospect.

Given the scope of smart cities, it is understandable that there is little consensus on what the definition of a 'smart city' should be. The British government claims a smart city is not a static concept. It says "There is no end point, but rather a process, or series of steps by which cities become more liveable' and resilient." Where there is clarity, however, is in the possible opportunities.

A study commissioned by the UK government has estimated that the commercial value of smart city solutions and services could reach \$408bn per annum by 2020. Analyst firm Frost and Sullivan, meanwhile, puts the combined market potential for energy, transportation, healthcare, building, infrastructure, and governance at \$1.5tn globally – a figure greater than the GDP of Spain.

Talking about potential is different to realising potential, however. It is unlikely that an

overarching body is going to emerge and manage everything that it is possible to achieve with smart city solutions.

The most likely organisations to offer this would be the local authorities governing the individual cities. But when austerity measures are still cutting into public sector resources, a loosening of the purse strings for such an epic undertaking seems unlikely.

Given the number of high profile digital projects that have gone awry in the UK in recent years, at huge cost to the tax payer, it may also be a struggle to find the confidence within a city to embark on this type of project.

This type of top down implementation would also be far too slow to deliver. People on the ground may well spot benefits that digital technology can deliver now, but be frustrated by those higher up wanting to review each project and work it into some kind of master plan.

As former Ovum public sector analyst and smart city evangelist Joe Dignan says "A smart city is a developing organism that takes advantage of the best contemporary technology available." Smart cities will grow, not out of one monolithic programme, but rather through numerous small projects, which will exploit the technology available to us now.

Superfast broadband, 4G networks, mobile devices, telematics and machine to machine solutions are already helping us do this. We've seen how companies like Google are able to mine mobile phone data to map congestion in real time and how the City of London is using Big Data to track crime hotspots.



## Realising potential

What we really need are applications that can automate the integration, processing and management of all this information – a move from the information economy where we create data, to the intelligent economy where we connect up and extract value from it. This is the practical stumbling block that needs to be resolved before we can realise the true benefits of smarter, more collaborative, cities.

It is crucial that organisations are able to create applications for these specific purposes quickly and easily when an opportunity is identified. Research in the public sector has revealed that local government IT executives still find this a challenge. A study, conducted by Mercato Solutions, found that 'unacceptable risk', 'long time-frames' and 'high costs' were cited as the main barriers to developing these applications.

This need not be the case however, as the emergence of 'low code', and 'no code', application development platforms are removing these obstacles. By using these platforms, applications do not need to be built completely from scratch – as the heavy coding is done in the background – so the potential risks, timeframes and costs are greatly diminished.

Isaac Newton once said: "If I have seen further than others, it is by standing upon the shoulders of giants." Application development platforms are allowing organisations to do just this, build on the work of others to go further quicker.

The other great advantage of no code platforms, such as Mercato's KnowledgeKube, is that it makes it possible for non-technical people to create bespoke software without any knowledge of how to write code. Instead, applications can be built through a graphical user interface. Analysts often refer to these non-technical application builders as 'citizen developers'.

These self-service platforms have made it possible to take a complete novice and, with 60 days of training, see them quickly produce advanced applications you would expect from experienced developers using traditional development approaches. This is exactly what we witness time and again with the young apprentices trained up as KnowledgeKube 'implementers'.

If we are going to exploit the potential of smart cities more quickly, we need public and private executives to realise that, when they spot an opportunity, they themselves can create an application that will make this happen. Their teams can collaborate and create using the application platform as a service (aPaaS) model, where an enterprise platform licence plus training unlocks internal digital capability and enables unlimited creation of applications.

Alternatively, at Mercato, the business also uniquely offers a dedicated team of no-code implementers, so executives can actively collaborate in rapid application development and get hosted business process applications more quickly and at less cost.

Another major advantage of developing applications in this way is that executives can test the water with minimal consequence. If an opportunity is spotted, organisations can quickly prototype, test, learn and amend applications easily and in real-time.

The technology exists that can deliver smart city solutions now, but it is crucial that we have the ability to experiment and innovate in order to realise the potential benefits sooner. In this regard, no-code application development platforms are turning what was only a smart city possibility into a reality.

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## Working together to protect those in need



**Richard Hurley, CIFAS**

A long established customer of a bank, Mr Jones, went into his local branch accompanied by his 'social worker' one day last year. The gentleman wanted to switch his bank account from a savings account to an account he could access with a cash card.

All seemed normal: luckily, the bank in question is a Member of Cifas: a not for profit leader in fraud prevention that enables organisations from every sector to share data to prevent fraud and protect the public.

In this case, the bank ran his details through Cifas and matched on a marker for the "Protective Registration for the Vulnerable" case. The bank contacted Cifas for advice, who in turn contacted the local authority. The local authority advised Cifas that this situation could not be genuine, as a social worker is unlikely to accompany one of their clients to a bank and that any change in financial products would come from the local authority and not from the individual himself. Cifas relayed this information back to the bank, and also provided the local authority with the name of the individual so that they could carry out welfare checks.

This is not an imagined scenario (although the individual's real name has not been used) – it is a genuine incident that has occurred since the roll – out of Cifas' 'Protecting the Vulnerable' programme.

### **Who are the vulnerable?**

The vulnerable in society have been a recent focus of the Financial Conduct Authority (FCA) who have

called for organisations from the financial services sector *to review their approach to customer vulnerability.*

The sad fact is that – in terms of fraud – anyone can be at risk. The frauds recorded by organisations on Cifas' National Fraud Database show that victims of fraud can be found in all areas of the country and from all walks of life. Therefore, at certain stages of life (or circumstances) people are at even greater risk of being targeted by fraudsters and unscrupulous individuals.

Most of us are lucky enough to be able to look after ourselves, manage our lives and – importantly – be responsible for our own finances. Most of us are also lucky enough to know that, in a worst case scenario, if we were not able to do this for ourselves, we have family or friends who would help if needed. There are some people who are not so lucky, however: people whose ill health, accident or injuries mean that they are unable to look after their own finances and are vulnerable in their everyday lives. These people, like Mr Jones above, also need protection from fraudsters.

Many local authorities have an Appointee and/ or Court Deputy Team that is responsible for the financial affairs of individuals like Mr Jones who have been assessed and do not have the mental capacity to manage their own financial affairs. Such individuals are placed under a court order of protection under the Mental Capacity Act 2005 and are not able to request financial or other services (such as credit, loans, passports and bank accounts). Cifas' 'Protecting the Vulnerable'

programme was created last year to offer greater protection to these groups. The service works in the same way as our long standing Protective Registration service (where members of the public at risk of falling victim to fraud apply to have a warning flag put against their details, advising organisations to conduct additional checks to ensure the validity of an application), except it is applied for by the Appointee or Court Deputy, and is provided to Local Authorities free of charge.

In 2014, over 123,000 individuals were recorded as confirmed victims of fraud by organisations through Cifas. With so many people every year falling victim to fraud and able to testify to the time, worry and effort required to clear up the mess, 'Protecting the Vulnerable' is an important part of the corporate social responsibility of Cifas, its Member organisations and the local authorities who are looking after these vulnerable individuals.

## Working together to protect the vulnerable

The 'Protecting the Vulnerable' programme is an example of collaborative working for a greater shared purpose. As already detailed, Cifas enables organisations to share confirmed fraud data for the purpose of preventing further fraud: protecting individuals from becoming victims of fraud, and allowing organisations to take a proactive, preventative approach to fraud rather than a reactive, damage limitation, approach.

Having long offered a system for members of the public to protect themselves should they be at risk of fraud (for example, through a data breach or loss of personal details and documents) Cifas is now working with local authorities to ensure that those people who are most vulnerable to unscrupulous individuals are protected before falling victim.

Several local authorities – including Birmingham – one of the largest in the country – have signed up to the 'Protecting the Vulnerable' service already (which is offered free of charge), with several others in the process of joining. Over 1,000 vulnerable individuals have already been registered to protect them from being targeted by unscrupulous individuals, with several cases reported of how the protective marker (and



following discussions between a financial services provider and local authority) has stopped individuals having their identities used by fraudsters.

Angela Small, Appointee and Court Deputy Officer at Birmingham City Council, was one of the first Court Deputy Officers to work with the programme. She said: "Within two months of registering our vulnerable clients with Cifas, credit search alerts revealed impressive, yet disturbing findings of two separate cases of attempted fraud, both online and in person, in the names of two of our clients. These findings prove the effectiveness and efficiency of Cifas Protective Registration and I would highly recommend this service to all local authorities."

*If you would like to know more then please contact us via email at [ptv@cifas.org.uk](mailto:ptv@cifas.org.uk)*

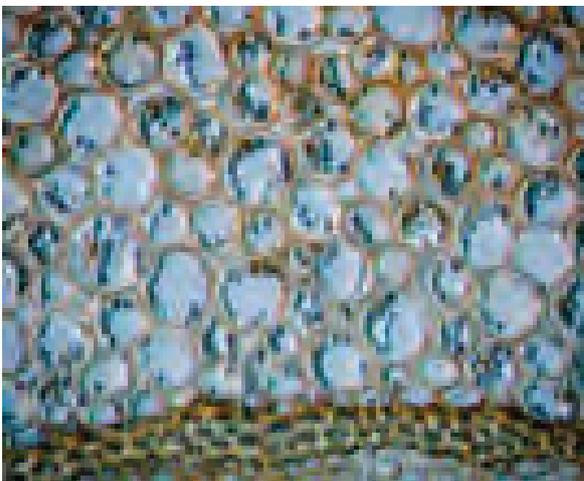
[richard.hurley@cifas.org.uk](mailto:richard.hurley@cifas.org.uk)

## Thinking small – xP (extreme partnering)

**Phil Richardson**

Let's outsource the photosynthesis department! They are not very good at flexible working and insist on operating only in daylight hours. The decision was taken a while ago and it's been a great success with much lower cost energy being provided and more room in the leaves for other core activities. It's also been great for the photosynthesis department. They are now working with others who need chemical energy. Everyone is happy. Except we are now thinking of bringing it back! We have lost the flexibility we once had and sometimes feel that overall we could do a better job ourselves.

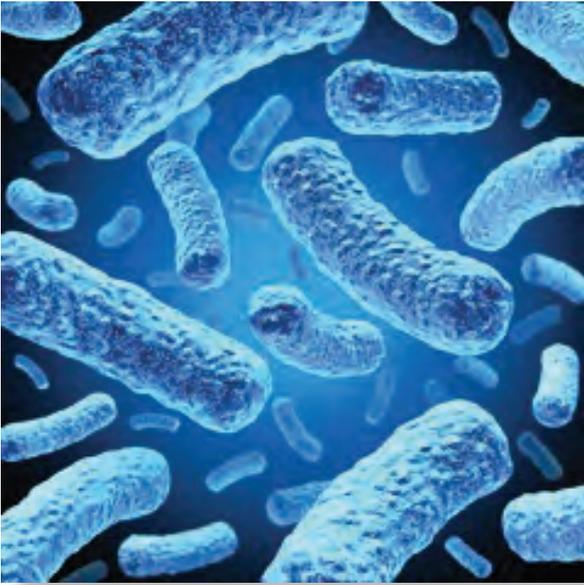
To improve efficiency and effectiveness organisations have traditionally outsourced back office functions. More recently the trend has been to bring those functions back in house. This is a mistake. A much better approach, based on the evolution of bacteria into the cell structure we have today, is to bring the outsourced functions into one new organisation and add in the key aspects from the core business that add real value - ditching the rest. Otherwise the outsourced functions that are simply added back in will be reabsorbed in a way that no doubt will lead to the situation that led to outsourcing in the first place. This thinking applies equally to organisations that have been fragmented in some other way following a different driver such as the need to regulate. One example would be the NHS, which today exists as a collection of different organisations.



*The cell structure of plant roots*

A billion years ago bacteria that had developed specialised skills to cope with the changing environmental conditions came together in communities to cooperate for survival. This relationship persisted and they became mutually dependent, creating what we now know as the cell. Thus, setting the case for change, the fundamental distinction found today in the living world is between prokaryotes – bacteria and eukaryotes – the protists, animals, fungi and plants – an environmentally driven change that demonstrates the power of symbiosis as a mechanism of evolutionary innovation. These various capabilities or functions contributed by the partner bacteria are called organelles in the cell. And it is these organelles that create an opportunity to think differently about how organisations could be designed to compete in today's harsh environmental conditions. They create the opportunity to 'Think Small'.

The outsourcing approach has created mono-business systems that specialise in functions or capability such as financial transactions or HR services. What if these outsourced functions and capabilities were to recombine in a symbiotic new form? Not back to the original organisation but to a new highly functioning system bringing together the best of all the individual expertise, new organisation organelles. This is exactly what happened a billion years ago. Bacteria evolved to take advantage of the growing levels of oxygen and created ways to convert chemical energy by absorbing new complex carbon structures as food. Others, such as the cyanobacteria, converted solar energy into chemical energy. Others provided reproductive capability, DNA management, protein synthesis, motility and microtubules. Together this was everything needed to make a cell: essentially the cooperation between collections of protein synthesis systems, coming together to create a new building block, from which an almost infinite number of solutions can be created. What if that happened with the organelles of business today: the outsourced, broken down, highly specialised functions and capabilities that sit in our various sectors, industries and markets?



*Bacteria*

Let's apply this 'thinking small' to the biggest UK organisation, the NHS. Here is a collection of functions and capabilities that are scattered across a wide range of organisations – the prokaryotic cells of today. The real opportunity is for the highly developed organelles to come together like the early eukaryotic cells into one efficient and effective organisation – an organism fit for the future. There are many positive signs that indicate that this could happen. General practice, as self employed businesses, already share services with community based foundation trusts. Many general hospitals and most teaching hospitals are also foundation trusts. Clinical Commissioning Groups (CCGs) focus on getting the best care for local populations whilst delivering value for the public purse. In England, NHS England currently commissions services through GPs, CCGs and specialist services in hospitals. And there are a plethora of other NHS organisations that look after other functions such as medicines, quality, training, estates and innovation that make up the complex web of organisations in the health sector.

Because it is complex, the temptation is to think big, to look at the strategic overview and to simplify the situation and put together a joined up solution. Unfortunately this way of thinking squeezes out the nuances of the way the NHS works. It misses the great quality of care and services that are delivered tirelessly across the country and leads many to think about trying to draw the NHS on a page. Instead we need to think small: bring together the specialist functions and capabilities to create a single organisation called the NHS

(which is ironically what most people already think exists). There are great examples of this starting to happen already. In the community multi-specialist teams are starting to emerge and GP practices are joining together as federations so that they can provide a wider range of services with better access that are available seven days a week. Foundation trust hospitals are integrating with other hospital trusts and GP practices to extend services into the community. Much work has also been done on getting better alignment between health and social care, and driving better prevention. Although this is challenging, the focus is on the need of the health and care of the person. Everyone wants this.

Evolutionary responses to key environmental pressures such as increasing needs for quality, a growing, ageing population, funding not keeping pace with rising costs and changing demands of customers are highlighting that maintaining the status quo is not sustainable. Thinking small would help change that. By creating new permanent associations between the core functions and capabilities it would be possible both to drive out duplication, and in a significant number of cases, triplication (further multipliers do exist in some cases). The flow of checks and balances between the organisation's organelles could be significantly streamlined to reduce the administrative burden and the administrators. Clinical standards would be standardised and the customer offered a broader range of services in a community setting with better access. This is before the technology revolution is fully grasped which would enable a vast amount of help, advice and in some cases diagnosis to be put in the customers' hands. And the best way to think about thinking small is at the system level get it right for the local population - probably a county at a time.

This 'Think Small' approach is based on a solution that has survived at least a billion years. The formation of permanent associations between organisms – and here applied to organisational specialties – that when joined persisted and became mutually dependent and thus created the best possible outcomes.

### ***Worth thinking small just for that!***

This article has been written by Dr Phil Richardson, based on his research in Biomimetics. Whilst privileged to work for NHS Dorset CCG the views and opinions expressed here are his own. [www.dorsetsvision.nhs.uk](http://www.dorsetsvision.nhs.uk)

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# newsdeskmedia

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# Reaching new summits in partnership publishing



**Barry Davies, Newsdesk Media**

For almost two decades, Newsdesk Media has worked closely with a wide range of international clients to produce publications for partners that include national governments and embassies, private-sector organisations and academic institutions.

Our editorial and design team produces around 20 high-quality publications per year, and our expanding portfolio includes titles for the governments of India, South Africa, the UAE and the Czech Republic; the African Union; all three UK armed forces; and financial institutions such as the London Stock Exchange Group.

We like to describe our business model as “partnership publishing”. Therefore, collaborative work is at the very heart of what we do.

Among the company’s longest-running and most fruitful collaborations is its association with the G7, G8 and G20 Research Groups at the Munk School of Global Affairs, University of Toronto – the world’s leading independent source of information and analysis of the institutions, issues and members of these international forums. Beginning with the 2005

G8 UK Summit, Newsdesk Media has worked closely with founder and director of the Research Groups, Professor John Kirton, managing director Madeline Koch and their team, producing publications to accompany every G8 and G20 leaders’ gathering, as well as the 2014 G7 Brussels Summit.

### High-level contributors

Our partnership with the University of Toronto brings enormous benefits to both parties, as the combined reputations of a publisher with experience in international relations and an internationally renowned academic research organisation enables us to secure editorial content from numerous global leaders in their fields. Recent editions have included contributions from participating presidents and prime ministers, as well as the heads of prestigious international organisations, such as OECD secretary general Angel Gurrá, World Economic Forum executive chairman Klaus Schwab and OPEC secretary general Abdalla Salem El-Badri. Such authoritative content cements the position of both our publications and



*Stephen Harper, Canadian PM at 2014 G7 Summit, Brussels*



*Francois Hollande, French President at 2014 G7 Summit, Brussels*

the Research Groups as the pre-eminent authorities in analysis of the summit agendas.

Our publications are distributed to delegates at all summit venues and pre-summit events, placed in the hands of government representatives, VIPs and media attendees. The Research Groups are always on the ground at each summit venue, acting as roving ambassadors and promoting the publications most effectively. A worldwide audience including government ministers, business leaders, non-governmental organisations and academics also receives copies of the publication via a targeted mailout, which includes digital distribution.

As each summit book is financed by advertising, it is imperative that we also work closely with the commercial supporters of each publication as they come on board. Many of these are multinational companies and organisations seeking to contribute thought-leadership pieces in the form of 'sponsored features', for which we offer the expertise and resources of our editorial and design teams in crafting text and layouts to maximise the impact of each advertiser's message.

A significant factor in the success of our summit publications over the past decade has been the cooperation and support that we have received from the various host countries, developed on a summit-by-summit basis. From facilitating distribution at the summit venue to providing exclusive editorial contributions from their leaders – most recently from Australian prime minister Tony Abbott, host of the 2014 G20 Brisbane Summit – the host countries play an invaluable part in the ongoing reputation and success of our summit publications. As we prepare for the 2015 G7 summit in Germany, we are delighted that our publication has been authorised by the host government and will include an introduction from Chancellor Angela Merkel. Discussions are also under way with the forthcoming G20 summit host, Turkey.

A high-quality book always makes an impact at the summits and, indeed, wherever we launch a new title. Nothing beats the look and feel (and smell!) of a freshly printed publication for making an impression. That said, there are obvious limits to the audience that can be reached with a paper product weighing in at around 200 pages, in terms of the cost and the logistics of timely distribution worldwide.

## Online expansion

In a new initiative to increase significantly our readership and expand our editorial content, we have recently upgraded our digital distribution with the launch of a dedicated website – G7G20.com. The new website provides us with further opportunities to collaborate with our colleagues in Toronto and to extend our coverage of summit-related matters year-round, rather than peaking as our annual G7 and G20 summit books are published.

The website acts as an online resource for summit-related articles and opinion, including the latest editorial submissions alongside an archive of texts from previous summit publications. The immediacy of digital publishing also enables us to include news updates and blog posts in reaction to current events, as well as expert analysis and insight from the Research Groups. Subscribers to the website will also receive updates in the form of regular email newsletters, while content will also be promoted via social media channels.

Our expansion in digital distribution of content is also indicative of the direction in which our industry is heading. Though reports of the death of print publishing persist, to quote the famous words of Mark Twain, they are greatly exaggerated. Traditional publishing remains highly regarded and effective, but increasingly needs to be accompanied by online outlets to secure ongoing audience engagement. As we embark on the digital development of our brand, we look forward to continuing our partnership with the University of Toronto and pursuing our aim of becoming the leading online source for analysis of important issues that resonate around the world.

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# Patent informatics for collaboration management

**Frank Tietze and David Probert, Institute for Manufacturing, Cambridge University**

When firms innovate openly they engage in collaborations with multiple actors, such as companies (large or small), universities or other research institutes, governmental institutions or even individuals (such as inventors or lead users) and sometimes communities of individuals (e.g. for open source software development). When collaboratively pursuing R&D projects with different partners, firms need to pay particular attention to the management of intellectual property (IP). This means careful consideration of knowledge, capabilities, and resources (including intangible assets) brought into a collaboration, those often patented innovations developed jointly during a collaboration and those that each partner develops individually after a collaboration is terminated, but which build on jointly developed IP.

While IP represents important assets that require careful attention in collaborative innovation projects, IP has another, often overlooked, dimension that is important in collaborative working environments.

Patent data is nowadays publicly available, with low access costs, as a valuable source for identifying collaboration partners. Both the strategic management of IP and the use of IP data for effective decision making in innovation projects are integral parts of the research at the Centre for Technology Management (CTM). The following paragraphs particularly draw on the latter subject.

Following the launch of the BACON (BACKfile CONversion) project by the trilateral offices (USPTO, EPO, JPO) in 1984, patent data has been progressively digitized. Nowadays, almost all patent data is available electronically. Digitization has helped to enable the patent system's original purpose: to be a source of innovation. While this was always the intended purpose, with today's low cost access to patent data its full potential can be exploited. The problem however remains to make sense out of the sheer amount of raw patent data. A number of established firms and start-ups have recently begun to address this problem by developing analytical tools that change the way that patent data has been used historically.

In the past, usually an individual patent or just a few patents were analysed in depth, but today huge amounts of patent data can be analysed in a few seconds. Today's problem is not so much the access to the data, but rather to master the art of conducting the 'right' analysis. A number of powerful analytical tools has been successfully developed (e.g. patent citation maps, landscaping) by established IP database providers, but also by a number of newly started ventures dedicated to specific patent analytics. Some of these have even been acquired by large incumbents and their tools are implemented in their commercial offerings.

Amongst the many purposes for which patent data can be used, we can provide a few examples illustrating how it may identify collaboration opportunities and partners. Figure 1 shows an extract from a landscape of 18,300 patent families related to solar energy inventions.<sup>1</sup>

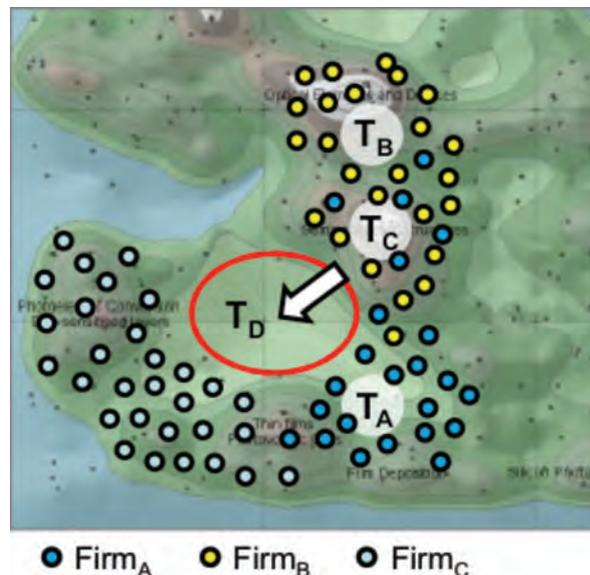


Figure 1: Patent landscape map for identifying collaboration opportunities

Such a landscape can be generated from patent data using, for instance, a tool originally developed by the company – Micropatent. The landscape depicts relations among different technological domains and provides insights into the density of patents in these domains. Different options are

<sup>1</sup> Original source: Tettman, R. (2010, April). What does the solar energy patent landscape look like? *Intellectual Asset Management (iam)*.

then available to manipulate the landscape. For instance, it is possible to visualize only patents owned by specific companies. Assume, for instance, that the patents highlighted in blue are owned by Firm<sub>A</sub>. Apparently, this company has a particularly strong patent portfolio in the technology domain T<sub>A</sub>. The landscape further reveals that another company (Firm<sub>B</sub>) has a strong patent portfolio in T<sub>B</sub>. Both companies actually have quite a number of patents in T<sub>C</sub> that links both T<sub>A</sub> and T<sub>B</sub>. This may indicate that they should consider joining forces to pursue collaboratively further research and development in the 'white spot' technology domain T<sub>D</sub> closely linked to their joint areas of expertise, but which seems to be hardly explored. By joining forces both companies may actually strengthen their competitiveness against Firm<sub>C</sub>, which appears to own a larger number of patents, hence has a stronger patent position than either Firm<sub>A</sub> or Firm<sub>B</sub>. Using a similar approach, patent landscapes can also be used to identify licensing partners.

Another example is depicted in Figure 2. The graph shows a selected number of patent families owned by the University of Cambridge and some of its subsidiaries. Particularly, the figure reveals patents that are jointly owned by the University and other actors, such as companies and foundations but also other research institutes and universities. Jointly owned patents are a good indicator for research collaborations, which are often difficult to discover from other sources. Firms often have an interest not to make them public for competitiveness reasons. Such a graph is however relatively easy and quick to generate with state-of-the-art patent

analytics. The available tools even offer valuable functions to automate the tedious data cleaning. When it comes to analysing patent data, previously a lot of effort and resources had to be put into homogenizing applicant names. For instance, applicant names often have some small spelling differences (e.g. Siemens AG vs. Siemens-AG) which needed to be corrected manually. Today's tools enable the clustering of companies and their subsidiaries using functions such as 'corporate trees'.

To summarize, IP management is important in collaborations when actors are jointly pursuing R&D projects. Due to the increasing availability of digitized patent data as well as the complementary analytical tools, this data source is becoming a valuable and easily exploitable source of information. When the art of analysing patent data is mastered, it can be used for multiple purposes, such as identifying ongoing collaboration or finding future collaboration opportunities. The data can support a wide range of decisions to be made along innovation processes e.g. through more effective technology intelligence. CTM research will continue to contribute to the efficient exploitation of patent data for effective decision making along innovation processes as well as to strategic IP management.

If you would like to learn more about IP related research or wish to get involved in one of our collaborative projects, please feel free to contact Dr Frank Tietze ([frank.tietze@eng.cam.ac.uk](mailto:frank.tietze@eng.cam.ac.uk))

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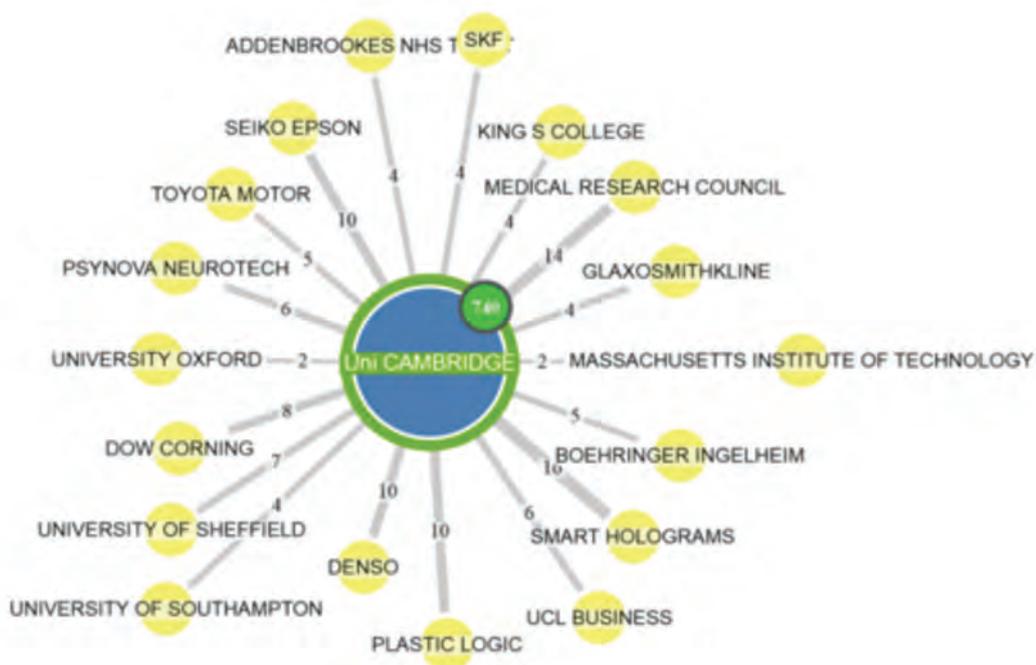


Figure 2: Collaborations of University of Cambridge (selected co-assigned patents)

# Commitment, consistency and capability

**David Hawkins, ICW**

Each new commitment starts with a challenge and one thing's for certain – we have over the past year taken on a number of new challenges, as have many of new members and companies, looking to introduce a robust platform for collaboration. Looking back we set ourselves some targets for 2014 and we have in the main managed to get them all up and running.

## ISO 11000

The agreement from the International Standards Organisation (ISO) marked in our minds perhaps the most significant achievement for ICW since those early days in 1990 when PSL was formed, since it meant that we had – with the strong support of BSI – taken collaborative working principles to international recognition. As an aside, the allocation of the reference '11000' means that the provenance of the new Standard, when it is published circa 2016, will be directly linked back to our efforts with BSI in publishing PAS 11000 in 2005 based on CRAFT.

There is still much to be done and whilst writing this article I am preparing for the April Committee meeting in Malaysia. To date we have 9 countries participating in the development process, including USA and China, and 15 more who are observing our progress. Perhaps the major challenge is alignment of the lifecycle model with the new format for the International Standard.

## BS11000 Certification Scheme

Whilst the ISO standard is moving forward we cannot forget the large number of organisations that are already certified to BS 11000 and the growing community that is on track achieve certification this year . Unfortunately UKAS decided not to adopt BS 11000 so we had a growing concern that there was no consistency in the way some certification bodies were assessing companies. To address this ICW launched a validation scheme which, we are pleased to say, BSI were first to come on board followed by LRQA and SGS. As such ICW now oversees their certification schemes, internal training and assessments in

order to ensure the principles of the standard are validated, so that organisations can have confidence in the process.

## Individual Membership Scheme

We announced the launch of our Individual Membership Scheme last May as a way of building a community of recognised practitioners. It required us to revamp completely our on-line systems which in itself was challenging. The numbers are growing and currently we have five Fellows, forty eight Full Members and twelve Associate Members. I am grateful to Nicky Painter who initially took on managing the process and Clive Winkler who has subsequently taken over the role. Later this year we will be running events exclusively for this community.

## Collaborative Awards

Some things take longer to mature and the programme for Collaborative Awards did stall for a while but I am pleased to say we have now got this on track and we have set the awards date for November 26th 2015 at the House of Lords . BSI has generously agreed to sponsor the awards and will be independently reviewing the submissions which will need to be registered by 30th May and submitted by 30th July. Turnover to read more about the Scheme.

## Collaborative Leadership MSc

Our major aim now as an Institute is to support the recognition of the skills needed to harness collaborative working and have these recognised as a fundamental business skill. We are pleased to confirm that WMG (Warwick University) has been working with us to create an MSc elective module for Collaborative Leadership. A pilot course was run in February and we are taking the output of that to refine the programme which will be another UK first. This module is the higher end of the courses that the Institute runs to support the implementation of best practice principles through BS 11000 and the development of collaborative Capability.

## Benefits Realisation research study

It has been some time since we undertook a focused research programme and we initiated earlier this year a programme with Warwick University looking at Benefits Realisation, funded by the Institute. This four stage programme will run through to November 2015, aimed at articulating both the existing benefits realisation and the future trajectory for collaborative working, which will include:

- Historical research
- Executive strategy reviews
- Evaluation of future development of collaboration
- A major industry wide survey

## Links with other Associations

One of the principles of the Institute is to be inclusive so a part of this year's programme of activity has been to build our links with other Institutes and Associations. I am pleased to say

that this has been widely well received and we now have direct interactions with:

- The Business Continuity Institute
- Institute of Risk Management
- Construction Excellence
- The society of Motor Manufacturers (SMMT)
- Considerate Construction Scheme
- The Supply Chain School
- Chartered Quality Institute

As you can imagine the all of this takes time and resources so in parallel we have been building up our core team of Associates and my special thanks to Nicky Painter, Clive Winkler, Neill Carruthers, John Osborne, Mark Sewell and more recently Bill Taylor and Neill Black, together with the BSI team and of course the Foundation Management Team and our Board. The higher you get the harder the climb but Commitment, Consistency and Capability remain our focus.

[david.hawkins@icw.uk.com](mailto:david.hawkins@icw.uk.com)

David Hawkins is ICW's Knowledge Architect and Operations Director

## Announcing the ICW's Awards Programme!

As part of our 25th Anniversary Celebration the Institute has established an Awards Programme to recognise excellence in collaborative working. We expect this to become an annual event.

There are seven categories of award:

- Collaborative Pathfinder
- Industry Collaboration
- Small and Medium Enterprise
- Innovative Collaboration
- Public /Private sector
- Skills Development
- Individual

BSI is jointly sponsoring these awards with ICW and will independently assess entries prior to final interviews and selection of winners.

This Awards Programme is open to all – neither Membership of the Institute nor BS 11000 certification is required.

**Quick – you haven't got long! Notifications of nominations are required by the end of May!!**

So go to the ICW website to find out the Entry Requirements for the Award Programme and what information each nomination must contain: [www.instituteforcollaborativeworking.com](http://www.instituteforcollaborativeworking.com).

**This year's Awards will be presented at the House of Lords on the evening of Thursday 26 November – a date for your diary?**

# ICW Launch NEW training & development programme

Following a review of its training arrangements and research on client requirement ICW have launched a new range of training and development programmes. The new range includes:

## Executive Briefing

This briefing will enable senior management to appreciate in their business context the potential opportunities, benefits, challenges and development processes to ensure maximum return on investment. (½ day)

## BS 11000: Awareness

Introducing any new initiative to an organisation can be challenging this course is focused on providing high level insight for those individuals who may be initially impacted by any changes or are being assigned to collaborative programmes. (1 day)

## BS 11000: Collaborative Leaders'

Effective implementation of any organisational initiative and embedding change requires internal ownership and leadership. This flagship residential programme is designed to equip internal champions to implement the BS 11000 standard and integrate solutions within the context of their organisations. Successful candidates will additionally qualify for automatic membership of ICW. (4 days)

## BS11000: GAP Analysis Workshop

Implementing BS 11000 will impact many functional groups within an organisation. This workshop, run in company, provides both insights to the drivers of the standard and a common cross functional understanding for organisations to assess current processes and understand how to achieve BS11000 certification. (2 days)

## BS11000: Auditing

For those organisations seeking to adopt the British standard and seek certification by one of the ICW validated certification bodies (e.g. BSI, LRQA or SGS) they will be required to periodically undertake internal auditing of their processes. This course delivered provides internal auditors with the

knowledge to assess this unique behavioural based standard. (2 days)

## Risk Management in Collaboration

Collaborative relationship risk management is an integral part of BS11000. Understanding what constitutes relationship risk and how effective mitigation strategies can be implemented is fundamental. This course looks at the role of the Joint Risk Manager and the techniques and tools that can be used to understand the potential for relationship risks throughout the relationship life cycle. (2 days)

## Collaborative Culture and Behaviours

The foundation for robust and effective collaboration relies on both the operating processes and the interactions of the parties involved. This two day course focuses on providing insight to the impacts cultures and behaviours have on performance, how to identify, monitor, measure and address both positive and negative behaviours. (2 days)

## Realisation of Collaborative Benefits

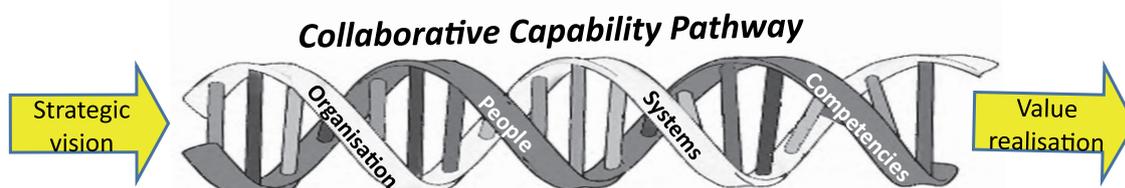
The adoption of strategic collaborations can support of a wide variety of business objectives. This two day course is aimed at firstly providing a basis from which to assess the potential benefits based on numerous case studies and then realisations of these throughout the life cycle of a relationship. (2 days)

ICW have teamed up with Warwick Conferences, based at the University of Warwick, which lies on the outskirts of Coventry. Situated at the very heart of England it is easily accessible by road, rail and air and provides a 1st class training environment with accommodation for delegates overnight. Courses will be run here and for certain short courses at Sullivan House, the home of ICW

For further details email:

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*Insight into  
Collaborative  
Working*