



# Collaboration for the Long View

Initiating, building and managing partnerships  
for long-term success

*“We have used Peak Experiences for many years for organizational development and culture change. The tools and content of their workshops and services are exceptional. Peak Experiences has helped my organization develop and achieve and kept the journey interesting and fun.”*

**Margo Beckworth-Burn, Sr. Vice President, Wyndham Worldwide**



**Building Effective Leaders in Atlantic Canada since 1992. [www.peak.ca](http://www.peak.ca)**



# Forward

**The challenges we face in our culture today are intensifying and becoming more complex, and so we need to do more to mitigate risk and translate inspiration into real change.**

Business models and communities are at risk from all quarters. They are also at risk from major changes in their operating context. We are heading into a VUCA world — volatile, uncertain, complex and ambiguous — where the necessity for more sustainable business practice is ever stronger.

Leaders must have one eye on the future if they are to remain successful in a complex and rapidly changing world. Doing nothing presents real risks. Acting now opens exciting opportunities.

To deliver a more sustainable future, businesses, organizations and communities need to see themselves as system innovators. This means creating efficiencies and innovating their core business, products and services, and understanding their role in the wider system, as well as working to create the conditions in which they will be successful. The BIGShift is a growing international movement founded by *Forum for the Future* that is focusing on making significant change happen.

To create change, organizations need to be free to innovate and experiment. This encourages a whole range of sharing by local stakeholders and encourages new and positive community interactions.

If you haven't already, it's time to explore the BIGShift approach. Many of the vital systems that we rely on are not working or they are at risk in the near future.

We need to change these systems to make them more resilient, more equitable and able to continue into the long term future. At Peak Experiences, we find practical ways to do this — something we call system innovation. We define system innovation as a set of actions that shift a system — a city / town, a sector, an economy — onto a more sustainable path. This approach to big innovation is doable and now more necessary than ever.

A handwritten signature in black ink, appearing to read 'Frank Gallant', with a long horizontal line extending to the right.

**Frank Gallant**, President and CEO  
Peak Experiences - The Learning Company



*“If you want to go fast, go alone; if you want to go further, go together.”*

### **African Proverb**

## Why a deeper collaboration?

Collaboration is rapidly emerging as an essential part of doing successful business — for corporations, organizations, municipalities and communities at large.

Facing rising resource costs and financial shocks, changing consumption patterns, disruption in supply chains, emerging new business models and the urgent need to reduce the impacts on the environment, leaders are having to learn to navigate a rapidly changing context.

These complexities, uncertainties and pressures call for significant new ways of thinking, innovation and the re-imagination of how to operate for long-term viability. Because many challenges are driven by multiple factors and are systemic in nature, they often can't be resolved by any single organization. More and more, leaders are turning to collaboration and partnerships to address problems too complex to deal with on their own.

Competition is not fast enough, or nearly far-reaching enough, to drive the kind of transformations we need to make. These systemic shifts need deeper levels of collaboration.

Collaboration — two or more departments or organizations working together to address common problems or developmental opportunities — has the potential to create far-reaching change for long-term organizational sustainability. While competition may drive aspects of innovation, it can't work at the pace and scale we need.

Indeed, most of the major provincial and global challenges we face — from addressing climate change to resource scarcity — can only be resolved through key stakeholders and individuals all working together in a more deliberate and effective manner.



## A constructive mindset helps deliver real outcomes

Doing this well, however, takes skill and consistent constructive mindsets. It can involve significant investment of time, energy and resources and those who commit get the benefits. It is becoming increasingly clear that our future here in Atlantic Canada depends upon more successful and diverse collaborations.

The good news is that powerful collaborative partnerships are very do-able. At Peak Experiences, we have been delivering internal and multi-stakeholder collaborations within business and organizations in Atlantic Canada since 1992.

We have also worked directly with small and large businesses, organizations and municipalities advising on strategy. We have been designing and delivering our own collaborative initiatives and acting as an expert advisor to others. This has given us rich insights into the ingredients for successful collaborations, as well as detailed understanding of how to deliver real outcomes.

We invite you into the process and offer guidance and insight into how to collaborate successfully to create system and/or culture change. In particular,

we designed to support organizations into the larger process of system innovation. We hope to encourage and support businesses, organizations, municipalities and communities in working with others towards a more sustainable and prosperous future.

### You have a choice to make.

You must choose what to imagine. In the near future, we will be forced to come to grips with the realities of planetary limits, climate change and global interconnectedness. The next 15 years will largely draw the outline for what we can accomplish over this time. What we do, or don't do to build a civilization that thrives within limits may be the most important set of decisions humanity has ever made.

If you're reading this, we assume you want to make the most powerful contribution you can to meet this crisis. As a leader, you have stumbled across an awkward reality, though: while we have an ever-growing set of solutions, no one really knows exactly what we should do, and how to get it done in the face of economic inertia, cultural denial and political opposition.

The problems we face are systemic ones, made worse by a massive cognitive gap between the world as described in our media and public debate, and the world as it actually exists.

Our worst problems are all, to some extent, rooted in our past experiences and our personal mindsets. If we want to make change, we need to think better. This is where a partnership with Peak Experiences comes in. We have been working with a diverse set of leaders on the effectiveness of their underlying thinking styles, attitudes, values and beliefs. We believe these constructive thinking styles provide the greatest insights a leader can have to access the long view for sustainable change.

We need keen insight into the systems we're working with, the ability to anticipate change in order to frame solutions, and tools for getting things done under difficult circumstances. But most of all, we need awakened imaginations.



*The key can be finding a burning issue that you can get players from across the system to sit down together and work on – especially the power players who have the greatest potential for influence.*

## Identifying areas ready for collaboration

Whether the change you want to create is within your organization, with current partners or it extends beyond your boundaries, a shift in your operating context will be required. Embracing the need for change will make room for a more collaborative approach necessary for success. Areas where an organization might be hitting the boundaries of what it can resolve on its own can include social, economic or environmental issues. For example, organizations might come together to look for ways of reducing levels of the cost of the supply chain, escalating costs of health care, or educational deliverables. The more urgent the issue is, the more scope there can be for collaboration.

By coming together, organizations can combine their insights, resources, creativity and collective leverage to create significant levels of change in critical areas. The process, however, takes time. It can seem slow, complex and unfamiliar. Taking an idea and turning it into an actual project needs passion, commitment and some investment — but the achievements can be significant.

## Six steps to significant change

It's important to build any process for creating change on an understanding of how change happens. Peak Experiences associates utilize the '**six steps to significant change**' model by *Forum for the Future* as it provides a relatively simple framework for those trying to create an impact in a given system.

A system can be an organization, a sector, an industry — something with a set of parts and inter-relationships that work together for a specific purpose.

### The six steps are:

- 1 Experiencing and understanding the need and desire for change is necessary to start the process. This includes raising awareness of the challenges a working culture or system faces and needs to address.
- 2 Then we move into the efficiency and innovation phase, where you need to diagnose the system to understand what needs to change and where the best pressure points might be.

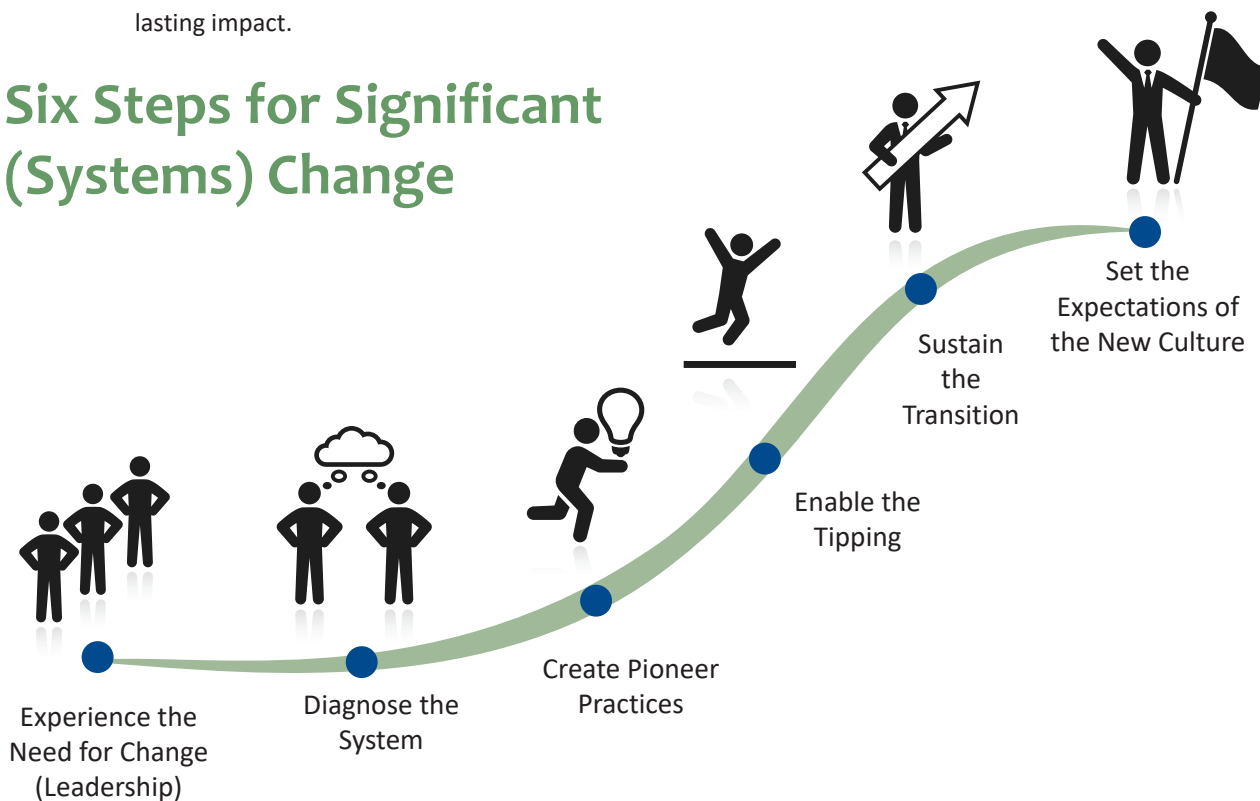
**3** Creating new or pioneering practice is about developing new and better ways of doing things. This will involve multiple ideas, some of which have the potential to become the new mainstream.

**4** Enabling the tipping point is where things are able to start to scale; ideas that are proven to work are taken up more widely by mainstream players and increasing numbers of people and organizations get involved. This step is often the hardest to make happen, but is critical for achieving a long lasting impact.

**5** The final two stages — sustaining the transition to maintain momentum, and;

**6** Setting new rules for the mainstream – are about embedding and spreading the change that has been created.

## Six Steps for Significant (Systems) Change



*“For those who are prepared to reshape their actions to serve the interests of the entire province – not just their firm, their institution or their community – this is the time to come together to build a vision for a better future, and to work together to achieve it.”*

**One Nova Scotia**

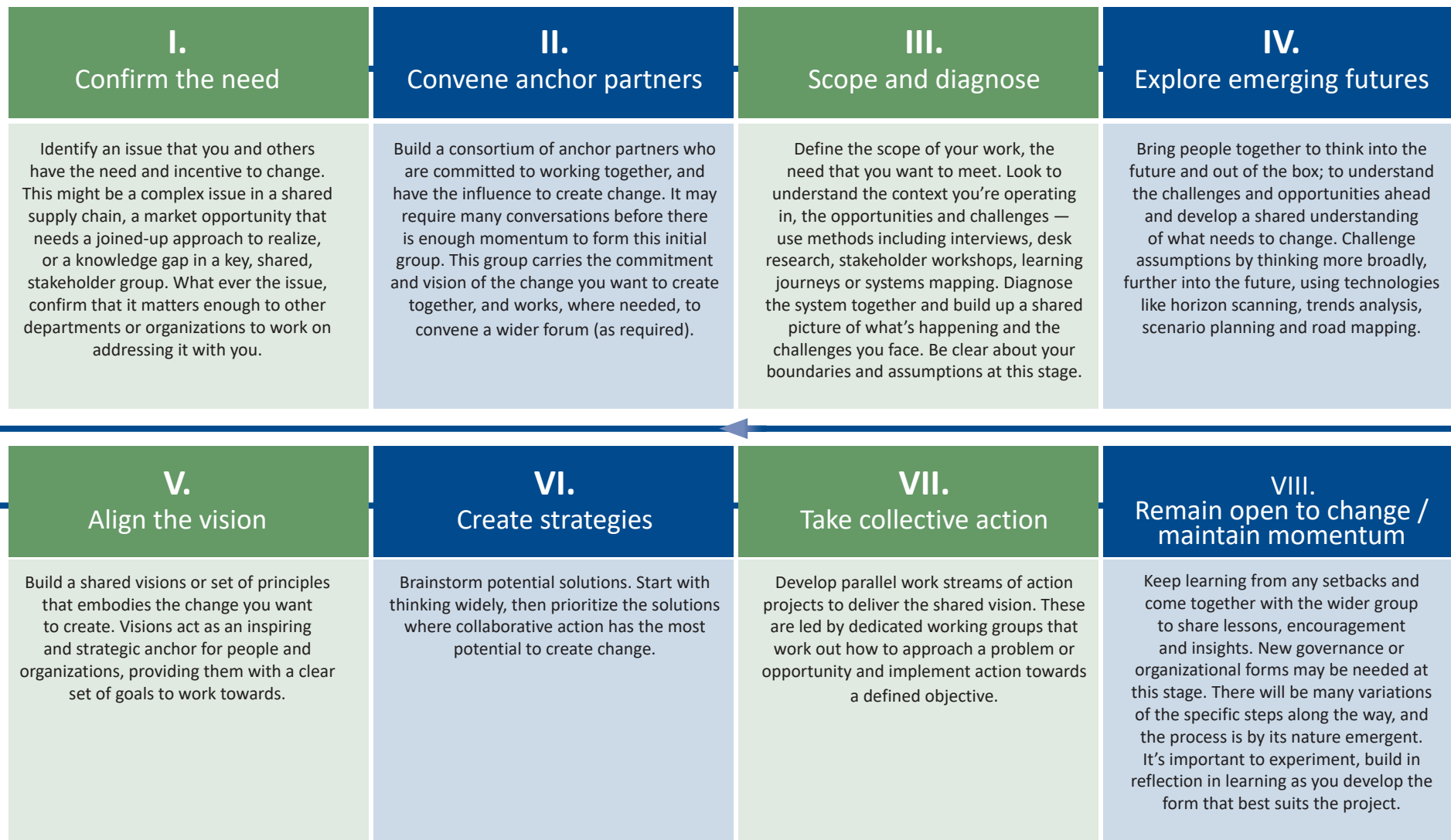
# The process of collaboration: Eight building blocks

How do you move from identifying an area that’s ripe for joined-up action to creating collaboration for change?

While there are different types of collaboration, depending on the nature of the issue or system and the type and number of stakeholders involved, the

overall process usually follows a similar series of steps. Bear in mind that change is not linear, and it may be necessary to re-visit parts of the process at any time.

## In More Detail...





# Models of collaboration

Collaboration can serve many purposes and levels of ambition. Simpler approaches may involve the exchange of information or coordination; others can work towards jointly developed initiatives, products or services. The more ambitious seek to transform a sector, sub-sector or supply chain, or address key industry or issues that have required change for a long time. An important aspect of our definition of collaboration here is that partners are actively **working together to create significant change in systems or sectors to shift them onto a more sustainable path.**

The form of collaboration will depend on a variety of factors such as the scope of the project, the urgency and complexity of the issue, the number of stakeholders and the resources available to work with. We find most collaborations fit within the following four models:

## 1 Collaboration to transform a sector, industry or supply chain: Collaborative Futures

This model works across a system or sector to create multiple breakthroughs which have the potential to create significant shifts towards sustainability. While industry faces a host of challenges, many industry-led initiatives are single-issue, can lack a holistic approach, and there is rarely a unifying view of what a sustainable industry or system could look like.

This takes a joined-up response by convening decision-makers from the sector or sub-system, and through engaging in a futures process to develop a shared diagnosis and vision. They then develop

platforms for working together to create and implement pioneering practice that can become mainstream.

## 2 Collaboration to address a specific challenge: Problem Solving Coalitions

Here a coalition of individuals or organizations sets out to tackle a particular challenge together. They identify a specific, systemic question or an ineffective cultural style and generate innovative responses. They select the best ideas, building detail and implementing. Scope can vary, with the focus concentrated on a specific issue or issue cluster.

## 3 Collaboration to create pioneering innovations and practices: Open Innovation

These collaborations bring together established players with emerging enterprises, ideas and innovations in new formations. They involve innovative processes and out of the box thinking to spot – and act on – opportunities in new ways.

## 4 Collaboration to address barriers and build new markets and systems: Market Shaping

This brings together multiple stakeholders to review different ways of addressing barriers within the system, or to develop opportunities for bringing new products and services to market. This can include actions to create the right policy and regulatory environment for change, such as liaising with government officials in certain policy areas like energy, climate change, human rights, fisheries, health care, information technology etc.



*“Approach collaborations with an open mind to explore new and renewed relationships with the goal of creating a new story together.”*

**Frank Gallant**

# Ingredients for successful collaboration

At Peak Experiences, we have an established history of convening organizations to help them tackle complex problems together. Through this we've observed clear patterns and learned some important lessons about what ingredients make for successful collaboration and without which they can flounder.

Below, we describe ingredients that we have learned are most important for collaborating successfully. **Use these as a guide** to thinking through your process, structures and planning for a **collaborative venture**. While projects and the models they are based on will vary, we have found that all these ingredients are needed in some form to collaborate well and to secure high quality results.

Many of these ingredients may sound like common sense and in some ways they are. But it's surprising how often really important things get overlooked in the process of managing a project, expectations with limited resources and budget. Too many kick off meetings start well, with lots of keen and highly motivated people, but because the purpose is not clear or the aims are not explicit,

momentum often falls away. Important agreements can fall short because there wasn't enough time to work through and resolve difficult issues or for people to reflect in between sessions, solidify their commitment and remember what's most important.

Motivated groups that do good work can hit barriers because they didn't maintain senior-level engagement. Building the right ingredients into your collaboration isn't rocket science — but it does take skill, lots of conversations and careful listening and management. We've clustered the Ingredients in the following categories — all are interconnected and impact one another in various ways. Think systematically in the way you implement them as each part in some way is a reflection of and in sync with the whole.

Purpose	People & Relationships	Governance & Legal	Process & Culture	Structure & Project Management
<p>Having strong purpose that everybody understands and is aligned with is critical. Sometimes the purpose starts and continues to be clear through the project; or it can shift. Continuing to learn about the nature of the challenges informs and strengthens the group's understanding of what they're working to achieve, and why.</p>	<p>The success of any collaboration comes down to the individuals involved, and the trust between them. Individual and group relationships need to be strong to provide an effective container for the work.</p>	<p>Getting governance and legal aspects right is essential for providing safety and stability while navigating uncertainties and challenges.</p>	<p>The most successful initiatives pay as much attention to the collaboration process as to the program of work. Individuals have different needs and responses, so the process needs to be reviewed together and adjusted on an ongoing basis.</p>	<p>These are the 'bones' of the project, which need to be strong enough to hold everything together and have the flexibility to adapt to shift in process, purpose and people.</p>
<p><b>Clear, shared purpose</b></p>	<p><b>Strong founding partners</b></p>	<p><b>Trusted governance</b></p>	<p><b>People centered process</b></p>	<p><b>Clear, flexible structure</b></p>
<p><b>Shared system diagnosis and learning</b></p>	<p><b>Diverse participation across the system</b></p>	<p><b>Management of competing issues</b></p>	<p><b>Creative, strategic tools</b></p>	<p><b>Project management</b></p>
	<p><b>Trust and personal relationships</b></p>		<p><b>Skillful facilitation and capacity building</b></p>	<p><b>Communication</b></p>
	<p><b>Senior-level commitment</b></p>			

# Barriers and Challenges

Negotiating the different perspectives to reach agreement and concerted action can seem slow and filled with complications. Inevitably, at some point even the most motivated group can get stuck. The following points are indicators of roadblocks that are most likely to occur:

## If those new to this kind of collaboration are particularly cautious

Especially if the process involves high elements of financial or reputational risk, or brings them into conversation with those they may previously have considered adversaries or with organizations that have significantly different working culture. Patience, trust investments and careful communication is required here — talk through the risks and concerns openly together. Study and learn from other collaborations — this provides inspiration and confidence that collaborations of this scale can really work.

## When the group is struggling to come to an agreement

For example, when working to reach consensus on the vision all members can sign up to. Skillful facilitation, creating space for honest and transparent conversations, and time for members to step back and reflect on the larger purpose can help here. Going back to trusted relationships is also key — engage founding partners in building alignment amongst other members.

## If workstreams keep hitting challenges without any quick 'wins'

Where the group is having a hard time maintaining momentum, the role of the project manager is to

provide the structures, milestones and timely reminders, which keep the group focused. It may also be necessary to do some more out-of-the-box thinking — action learning approaches using innovation tools like futures, storytelling and brainstorm will help. Re-assess the skills and capabilities that are needed, and think creatively about who you need to bring in and when.

Engaging in collaborations of the kind we describe here is an emerging way of working and a new skill for many. Learning to do it well requires time, and the adoption of certain behaviors and new models of shared leadership.

Partnering with others in this way involves letting go of control. The true impact and change of collaborations often take time to emerge, and sometimes it's the ripple of effect and unintended consequences that can produce the most value.

## The role of the catalyst

Change can come from any part of the system. It can be in response to pressures from activism or from within the supply chain, or through the perception of new opportunities. Look at how we can address this together and take initiative to begin the conversation. Businesses, NGOs, foundations, grassroots organizations, influential individuals and others can all act as catalysts in this way.

Getting a collaboration off the ground often needs not only a catalyst, but the convener. They can be of help to identify and gather the stakeholders, particularly those with the most potential to galvanize support and exercise leverage for change. The convener also helps to facilitate the collaboration process — at least until the initiative and strong enough to go forward on its own. This is the key role we offer organizations going forward.

## Worksheet

What is the nature of the challenge you were trying to solve?

What type of collaboration will best suit this challenge?

What are the barriers to change? What has been done before and what can be learned from that?

What is the system, sector or subsector that needs to change?

How bright is a system for change? What are the pressures and windows of opportunity?

Where are the other stakeholders? How are they operating and what is their motivation?

Who are the key actors and influencers? Who has the power and resources?

What has driven change in the past? What is driving it now?



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## We are experienced.

Peak Experiences is an independent consultation group that works across Atlantic Canada with business, government and other organizations to solve complex cultural and sustainability challenges. Our track record spans over twenty five years.

We've got a reputation for effective, long term partnerships with our clients, helping them to transform the critical systems and organizational cultures that we all depend on to make them fit for the challenges of the 21st-century. We share what we learn from our work so that others can be more successful.

Culture change and system innovation is at the heart of our strategy. One of our key approaches is creating innovative partnerships, bringing together groups to solve bigger sustainability challenges. We look forward to having a conversation with you about how our long view collaborative approach can bring value to your organization.

# Learn it. Apply it.