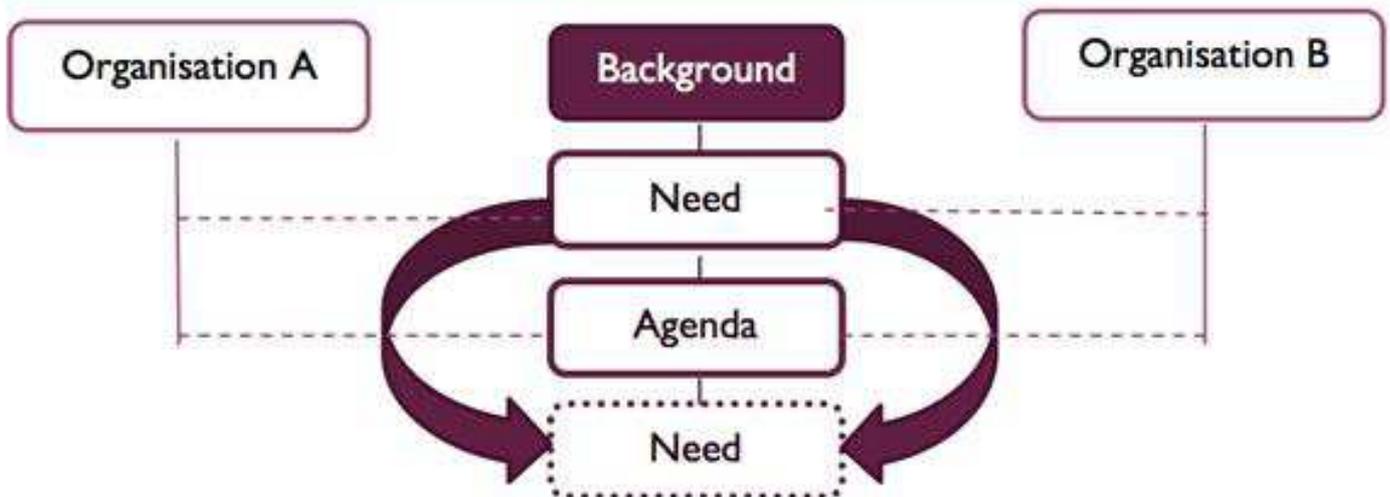


Your guide to checking out your business partners  
BEFORE you jump into a partnership venture

# THE ESSENTIAL PARTNERSHIPS TOOLBOX

## Sharing Services and Systems



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# Sharing Services and Systems

An important contributor to the success of sharing services or integrating systems is the gradual introduction of change. Through working with groups of organisations investigating sharing services, and systems, we identified the following levels of change in the implementation process:

1. A clearly articulated business case
2. Delegation and internal communication
3. Templates and resources
4. Policies, procedures and processes
5. Organisational systems eg human resource, information technology
6. Integration

Partnership proposals that will lead to a significant level of systems and process adjustment and/or sharing, should consider the implications of these levels of change to minimise conflict later on:

## Level 1 – Business Case

A systems sharing process backed up by a solid business case will assist in keeping up the momentum. If the business case is not clear, the process can become confused and unfocussed. How will each partner know the business benefits of the arrangement otherwise? [See Plan.](#)

Business benefits \_\_\_\_\_

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## Level 2 - Delegation and internal communication

This level can easily be overlooked at first, but is one of the most important. Without a clear understanding at the management level of each partner as to the Proposition (background and need), Vision and benefit of the project to the business, and without reporting and feedback, any progress can be halted at any of the later stages.

Potentially senior level staff or Board members may be invited to be part of the leadership group for the partnership (where relevant). Their role will be different to that of the manager, staff or other people involved in the partnership activities.

A communication plan should be put in place that defines levels of responsibility (Board, manager, staff and others) and reporting milestones (committed deliverables, progress,

issues/risks, finances). The manager should report progress regularly to a designated level of authority. Consider the Terms of Reference for any change management teams to create boundaries around delegation and internal communication. Put together a communication flowchart so that people can 'see' how decisions are made and reported.

If this is a one on one partnership between two business owners, consider the roles of staff.

- Will a leadership team be required?
- How will it work (Terms of Reference)?
- Communication Plan in place?

## Level 3– The Safe Zone / Templates and Resources

When groups of organisations come together to develop closer relationships, it is not known how solid the 'Foundations' are. A safe collaborative action is to share templates and other documentation. People may have already been sharing these as part of networking or cooperating activities. The benefits are easy to identify and prove. Sharing templates and other documentation can be a moderation process that lifts quality standards across the group of partners.

Other kinds of resources that could be shared at this level are learnings and documentation from professional development.

The people taking part in this level are likely to find the process a positive experience, checking what they have in place, the discussions and activities to determine a common template, and navigating internal organisational procedures to update systems with mutually-agreed templates (continuous improvement).

As partners could spend some time at this level, it may be worth determining a plan with a timeframe comprising a list of templates and documentation to be reviewed. Depending on the type of organisations, this could be for a period of up to a year and in some cases, 18 months. This process is of clear mutual benefit to all involved.

Going through this process strategically improves outcomes that lead to greater integration.

- Is this a partnership that would benefit from aligning our systems and processes through reviewing and sharing our templates and resources?

Templates /Resources \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Anticipated timeframe \_\_\_\_\_

Anticipated outcomes \_\_\_\_\_

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### Intellectual Property

So far, we have discussed sharing of existing resources, but what will the arrangements be for new resources? What about intellectual property (existing and developed by the partnership)? [See Partnership Resource Plan.](#)

## Level 4 – Policies, procedures and processes

Dependent on the [level of the partnership](#) you may be required to review and/or standardise your policies, procedures and processes.

### Policies and Procedures

Which policies and procedures may require a review?

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### Processes

The sharing of processes can be described in three stages:

- (A) Standardising processes in each partner organisation
- (B) Streamlining the processes across the partnership; or
- (C) Implementing a new cross-partnership process.

**Standardising** processes across the partners, backed up by common templates and other documentation, affirms a consistent approach so that clients can be confident of the quality of service in each of the partner organisations. This standardising of processes may be underpinned by a 'common brand'.

For this to occur, partners must be able to provide a consistent level of support (personnel, facilities, service). This may be difficult if the partners are of different sizes and organisational capability.

If this is the case, the partners may introduce **streamlining** processes across the partnership. By this, they may share staff to ensure a level of service at each partner site.

For this to happen the smaller partners must be confident that the larger partners are not going to take away their ownership and autonomous decision-making. The larger partners may also be affected if the streamlining impacts on existing job roles. This level may take a year to trial, adjust and evaluate.

The third stage, **implementing a new cross-partnership process**, is by experience the stage that cannot be rushed and is better implemented after the other levels. This is achieved by standardising the underpinning organisational systems.

Which processes will be impacted/require a review?

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## Level 5 – Organisational systems

The voluntary standardisation of organisational systems involves a high level of trust, a lot of negotiation, significant knowledge of what is required of these systems and the preparedness of each partner to develop and implement a change management process within their own organisations.

For organisations that employ staff, a common human resources platform would enable a quality employment and performance management system, including keeping records of professional development that may be required for external compliance evidence (eg health services and training organisations).

Professional off the shelf HR packages may be too expensive for individual organisations but may be achievable as a group purchase. The partners may need to review what's on offer against their requirements, contact and get a quote, and then decide between the options available and which is the best for them. This is a difficult process at the best of times, but can be confusing for organisations that don't know enough about HR systems to make an informed decision.

If purchasing a HR package is too expensive to consider, the partners may decide to contract a HR specialist to design a simple system for them.

Standardising IT systems could have benefits not just for each organisation, but to the partnership. Cloud technology could enable one partnership wide system and record keeping database. At the other end of the scale, common IT resources may relate to common software packages or platforms (Windows versions, Apple etc). The consequences could imply updating of hardware, with financial implications for the partners.

Financial implications is one barrier to achieving common systems, updating skills, impacts on job roles and giving up levels of organisational culture and autonomy are others. The brakes go on and the partnership begins to strain.

I have witnessed success and failure at sharing organisational systems. For one partnership, implementing a new website for the partnership was a good idea but under consideration it was decided to invest in introducing a common website template for each organisation with one page focusing on the partnership brand. They were not ready for one partnership-wide website. They wanted to maintain their individual identities and autonomy. Even getting the

websites updated to a common template took some negotiation and one partner did not already have a website.

In another instance, a partnership was looking at a common HR system. The group investigated a few models via the internet and with the support of a HR specialist. The HR specialist was quietly frustrated that some partners were not taking the idea seriously (or were they out of their depth?). It eventuated that the partnership was not ready to share at the systems level. They were, however, prepared to share recruitment process documents and performance management templates. This group had not reached the level of maturity for a common HR system.

An example of successfully navigating organisational systems sharing concerned a partnership of ten organisations, all with different operating systems but had common software platforms. They formed a working party that comprised the IT professionals within their organisations and spent some time at the earlier levels and integrating systems via a three-year plan approach. They were not in a hurry, but over time achieved partnership-wide systems.

Introducing common organisational systems in a hurry can lock the participating organisations into external contracts with suppliers that do not follow through with customer service. This occurred with a group who were able to get discounts for signing up to a common data software supplier. They were signing up to a more sophisticated system than they already had with more opportunities for database analysis. However, some found that the system was too complicated and the level of customer support was inconsistent. They returned back to their previous suppliers at the first opportunity.

Whilst this example demonstrates that customer service follow-up is an important feature to investigate when making a choice, it should also be noted that even in partnerships, not everybody has to subscribe to every activity.

Will this partnership lead to a review of our organizational systems? Y / N / Not sure

Which ones? \_\_\_\_\_

Resource implications (eg financial, HR, IT etc) \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

## Level 6 - Integration

By the time partners incorporate common templates and resources, policies, procedures and processes and organisational systems, they may consider creating a new singular entity (secretariat) or merge. Operations will become integrated to the point of being able to create a secretariat model with an office entrusted with administration, records management, IT and HR responsibilities, as well as managing working parties on behalf of the partnership. The singular entity may be an independent company or association established by the partners or it may be that the partners merge into one organisation. This is the final example of sharing services.

This is also the first stage of a new partnership company. Whereas the scenarios to date recommend a long-term timeframe for implementing the various levels of sharing services and systems, for business partnership ventures, **immediate change** may be required. Thus, in these circumstances, partners must consider as a priority:

- A clearly articulated business case to provide a focus for the systems
- Clear decision-making and communication structures – who does what, is responsible for what etc , what and how things get communicated and accountability to the partnership
- What resources will be shared with the partnership – including arrangements for copyright and IP of existing resources
- What resources will remain with the partners' own businesses
- Financial systems, insurance, workplace health and safety and other compliance requirements are in place for the partnership/all partners
- Whether partners are compatible with a strong foundation see [Foundations of Collaborative Partnerships](#)

This document explores six levels of Change. For more information on the Change Management Process and Enablers of Change, go to the Managing Change module.