> *"While intuitive "chemistry" may provide a sound initial impulse, we propose that building a successful partnership is more predictable if conscious, disciplined, and intentional strategies are used from the very beginning."*

An Inner Blueprint for Successful Partnership Development: Putting a Relationship to Work

By Peter Norlin & Judy Vogel

INTERESTING THINGS HAPPEN when two people attempt to work together for a common purpose. From earliest history, whether hunting for food, raising children, or living in a community, partnering has allowed new things to happen that would not have emerged if people were working separately. Many wisdom traditions explore the generative force of collaboration; for example, the Tao Te Ching says that "first, there is oneness. Then the one begat two. Two begat three. And three begat the myriad things." Commenting on this dynamic unfolding, Julia Measures says, "When you and I begin speaking . . . there is a 'space' between us. Then as we're together, suddenly something starts to move between us that doesn't belong to you and doesn't belong to me—the three. It can move in any direction; we can nudge it this way and that way. It's life on the move, and we are totally participating in it" (Measures, 2003). The "three," that striking manifestation of "life on the move," can be observed and experienced in a partnership relationship, and it reflects the unpredictable and exciting potential at hand.

As we have worked in the field of organization development, we've often found ourselves facing the professional challenges of learning to work effectively with other colleagues or helping our customers develop their capacity to collaborate successfully to accomplish their goals. In both of these situations, the reasons for "working with" are usually clear: something significant needs to get done, and more than two hands are needed. In many cases, people simply pitch in informally, contribute their skills, and finish the job—and sometimes, in the process, learn something about how to work together.

In other situations, as people consider what tasks need to be accomplished and who might be best suited to accomplish them, they may decide to define this working relationship explicitly and formally. They begin to think of themselves as *partners* in an ongoing relationship, a collaboration that requires the creation of a special interpersonal connection, one that enables the full sharing of their resources in a challenging environment of customer expectations and opportunities. Choosing to partner begins a rich and complex journey and one that sometimes fails.

So why do people undertake the challenge to create successful conditions for "working with"? In *Turning to One Another,* Margaret Wheatley identifies and explores the deep human hunger to live and work in close connection with others (Wheatley, 2002). We share her interest and have gathered data from consultants and clients about their motivation to work in partnership. People report the following experiences and beliefs about the benefits of partnering

- ■ It offers greater potential for professional effectiveness, personal learning, and creative synergy.

- It builds more credibility with customers through combined reputations and name recognition.
- It meets affiliation needs and counteracts professional loneliness.
- It provides a more comprehensive perspective through the resources of difference (i.e., gender, race, experience, etc.).
- It provides an opportunity to model partnership for customers.
- It's simply more fun.

This article offers our latest thinking about how to build and sustain a satisfying, successful partnership. We begin by outlining a model for partnership development, including some thoughts about how to "nudge" the prospective partner in order to create a resilient and productive relationship. We offer a few typical pitfalls and breakdowns in this process, and suggest strategies and key skills that can help partners to avoid or resolve these troubles. We conclude by applying our model to some familiar pairings, including consulting partnerships between internal and external, two internal, and two external colleagues.

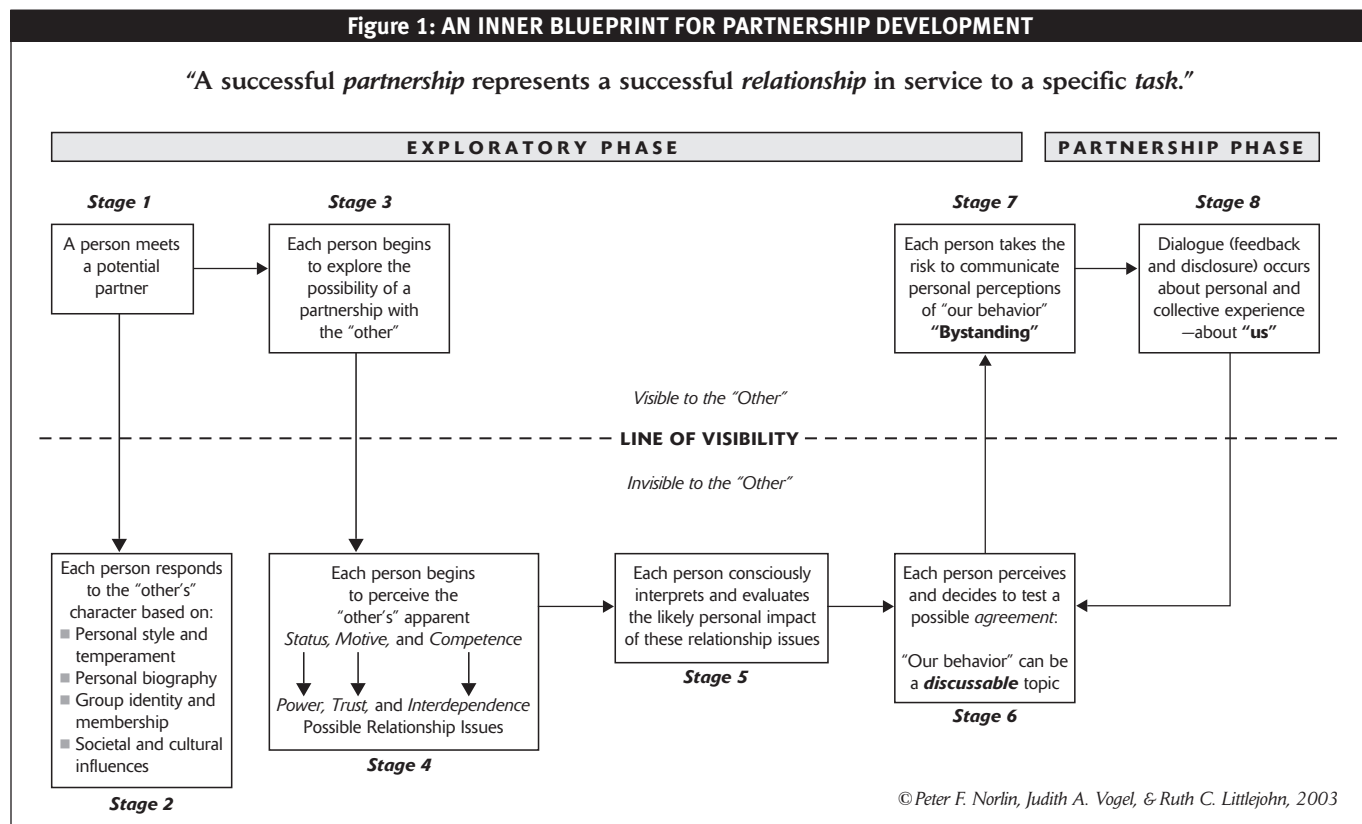## CONSIDERING PARTNERSHIP: OUR CORE ASSUMPTIONS

We define *partnership* as a *successful relationship in service to a specific task*—we believe that when people choose to be partners,

they are also choosing to *put their relationship to work*. Their achievements will be the result of both their willingness to see their relationship as the key to their effectiveness and of their ability to use it as such. People are drawn to partner for diverse and often unexpressed reasons. While intuitive "chemistry" may provide a sound initial impulse, we propose that building a successful partnership is more predictable if conscious, disciplined, and intentional strategies are used from the very beginning.

Becoming conscious, disciplined, and intentional is a complicated assignment when human relationships are involved. First, individual behavior is driven by personal mindsets—beliefs and assumptions—that are, in turn, created by the ongoing, intricate interplay between one's own perception and experience. We assume that people are often unaware of these inner connections, of the specific nature of their own "realities," and of their own personal behavioral styles. This means that *consciously* developing a relationship depends on their ability to use a critical building block of emotional intelligence: self-awareness (Goleman, 1998; Goleman, Boyatzis, and McKee, 2002).

We also assume that even if people have a high level of self-awareness, they may be unwilling, for many reasons, to discuss their personal beliefs and the impact of their behavior openly with one another. Marshak and Katz, as they explore "covert processes," suggest that people will typically express to others—and make overt—what they believe to be "acceptable, proper, reasonable and legitimate" (Marshak and Katz, 2001). Based on our observations of both successful and troubled partnerships, our last core assumption then is that partners face two

Figure 1: AN INNER BLUEPRINT FOR PARTNERSHIP DEVELOPMENT

"A successful *partnership* represents a successful *relationship* in service to a specific *task*."

EXPLORATORY PHASE | PARTNERSHIP PHASE

Stage 1 — A person meets a potential partner

Stage 3 — Each person begins to explore the possibility of a partnership with the "other"

Stage 7 — Each person takes the risk to communicate personal perceptions of "our behavior" **"Bystanding"**

Stage 8 — Dialogue (feedback and disclosure) occurs about personal and collective experience —about **"us"**

Visible to the "Other"

- - - LINE OF VISIBILITY - - -

Invisible to the "Other"

Stage 2 — Each person responds to the "other's" character based on:
- Personal style and temperament
- Personal biography
- Group identity and membership
- Societal and cultural influences

Stage 4 — Each person begins to perceive the "other's" apparent *Status, Motive,* and *Competence* → *Power, Trust,* and *Interdependence* Possible Relationship Issues

Stage 5 — Each person consciously interprets and evaluates the likely personal impact of these relationship issues

Stage 6 — Each person perceives and decides to test a possible *agreement*: "Our behavior" can be a **discussable** topic

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key challenges. They must accept the value of self-awareness and seek to expand it, *and* they must be willing to openly explore personal information with one another. If they are not, then personal positions and reactions will remain covert and undiscussable, leading inevitably to a disabled partnership that is unable to develop strategically, efficiently, and creatively.

PUTTING A RELATIONSHIP TO WORK: AN INNER BLUEPRINT FOR PARTNERSHIP DEVELOPMENT

The development of a successful partnership involves two sequential phases, the initiation of an *Exploratory Phase* and the emergence of an explicit *Partnership Phase.* As shown in *Figure 1,* we separate the steps in this unfolding process in another way as well. We have created a demarcation between inner, personal activity that is conducted privately by each partner, and behavior that is expressed directly as a consequence of this interior work. This boundary between inner and outer work is called the *Line of Visibility,* and it represents a point of decision for each partner, since once a person has identified personal perceptions, hopes, wants, and concerns, this material is available to be explored and negotiated with the other. Like the

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JoHari Window, a construct for understanding what is known to self only and what is known to others, our *Line of Visibility* identifies the moment when partners must make choices in the service of the relationship and simultaneously in the service of the work that they engage in together.

In Stage 2 of our model, the behavior that one person presents to another person is the manifestation of both predetermined and environmental factors, and these will be integrated and expressed in both clear and subtle ways. Research over the last few decades, for instance, demonstrates that one's genetic material plays a significant role in shaping self-specific character and temperament; in addition, experiences in one's family-of-origin and in subsequent personal biography will also shape personality and behavior. Further, there is the influence from messages received as a member of different identity groups, according to gender, race, age, social class, sexual orientation, and so on. And finally, since people live in a social and cultural context, mindsets and hence behavior will also be affected by experiences in school, religious settings, neighborhoods, and geographic cultures. Thus, when two individuals begin to know one another, they are each bringing to the conversation layers of personal characteristics and experience, and some of this information will be visible to the other person, through both appearance and behavior.

However, in the case of potential partners, as people talk with one another about themselves (Stage 3), we propose that they will also begin to pay attention to three specific and deeply significant qualities in the other person. They will be influenced strongly by what they see or assume to be the *status, motive,* and *competence* of the "other" (Stage 4). These factors are critical because they identify important interpersonal concerns that play a powerful role in the development of *working relationships.*

As Stage 4 indicates, when people assess differences in *status,* for instance, the underlying relationship issue is *power and control.* They make comparisons with the "other," based on assumptions about where they stand in terms of personal power and how any perceived differences in power might emerge during a relationship. The question they must answer is, "Will I have a sufficient amount of influence and control in this working relationship?"

At the same time, a second concern relates to perceptions of the other person's underlying *motives* both for considering a partnership and later for making the many decisions that they will face. Here, people are paying careful attention to behavioral cues that help them judge another's integrity and authenticity, since the underlying relationship issue is *trustworthiness.* In this case, the question to be answered is, "Will I be able to trust this person as we work together?"

The third concern, *competence,* is also of vital importance to potential partners because it relates to the actual work. Obviously, since the purpose of partnership is accomplishing tasks together, at the very least each person wants to be sure that the "other" has the skills and experience to do "the job." For example, sometimes people with similar skill sets decide to join

together to intensify the impact of their individual effort. In other situations, people become partners because putting sets of different and complementary skills to work broadens the impact of their effort or creates a new synergy of quality or creativity. Regarding this third relationship issue, the concern is, "Will we be able to work together in a *positive interdependence*?"

Of these three important, underlying relationship issues, *trustworthiness* presents an interesting paradox. On the one hand, each potential partner requires a certain threshold of information, both assumed and observed, about the other's apparent motives in order to experience enough trust to make an explicit agreement about partnership. On the other hand, trustworthiness is a phenomenon that requires active testing through real experience to be confirmed. Tension thus emerges from the need to feel enough trust to risk living more fully into a relationship in which trust can be tested—to be confirmed, shaken but renewed, or finally denied. This paradox recalls the old chicken or the egg question. In this case, both people need to act "as if" sufficient trust exists in order to create the conditions to test trust. Only through that cycle of risk can trust deepen to a level that supports a genuine partnership. And only if trust develops can the other two key relationship issues be handled successfully.

Several key points are important during this initial period of observation, assessment, and reflection. First, we see this series of early steps as a developmental process. This means that potential partners will feel comfortable moving toward a more open conversation about an actual partnership when they have decided that they feel "good enough" with their assumptions about the other's *status, motive,* and *competence*. Next steps in the *Exploratory Phase* are possible because the questions about the relationship concerns have been satisfactorily answered—for the moment. Nonetheless, these specific concerns will persist for both; as a working relationship develops, each partner will monitor new information that accumulates and integrate it with past assumptions. At stake is whether people will continue to pursue a partnership based on what they continue to learn about the "other."

Throughout this process of generating and testing hypotheses about another person, they are also generating several kinds of informal feedback about themselves in relation to the "other." The yardstick they are using is ultimately their percep-

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tions of their own *status, motive,* and *competence* as compared to the "other's" (Stage 5). When people feel "good enough" about the other person's behavior, it is also because they have decided that, in some satisfying way, there is a "good fit" between their evaluation of themselves and their evaluation of the other person. Further, each person makes assumptions about how they themselves are seen through the other person's eyes. The question arises, "Will we be a good match?" If the answer is, "Hmmm, could be," then the possibilities for an actual partnership to develop increase.

Finally, during this *Exploratory Phase,* there is a continual interplay between internal process and external conversation, which means that people must decide whether they will share their thoughts aloud across the *Line of Visibility*. As people grow more familiar with each other, whether in a single conversation or over months of initial relationship, they find themselves building a database about the other person either by asking questions directly, or using informal cues, or both. The crucial issue, we've observed, is whether both people are able and willing to use this information in the service of the relationship. When two potential partners consciously reach the point of making a decision about whether to comment openly about their personal thoughts and feelings about the other person and the possibility of relationship, then they have moved into the realm of process observation, a step (Stage 7) we refer to as "bystanding."

As people stand on the edge of this choice, they are teetering on the brink of entering the *Partnership Phase,* because as they demonstrate the *ability* to talk about their interpersonal process, they are also demonstrating their *willingness* to do so. In other words, their relationship becomes a "discussable" topic (Stage 6). We believe this is the "moment of truth" for partnership development because it means that in addition to dealing openly with task issues, two people will be able to openly negotiate and resolve issues in their relationship—to talk about "us" (Stages 7 and 8). Obviously this is not a one-time decision. To ensure that a partnership endures, both people must value "bystanding" and "discussability," and over and over again, they must talk about the behavior that they observe in their *working relationship* in an ongoing process that hopefully deepens trust and supports successful collaboration.

TAKING PRACTICAL ACTION:
SOME CONDITIONS FOR SUCCESS

What, then, are the implications of this model? Formal partnerships rarely dissolve because of the technical incompetence of one or both individuals. In our experience, partnerships typically fail because partners don't value or access their own self-awareness and because they ignore emotional issues in their working relationship. There are some telltale signs of partnership disintegration. On a continuum of gradual personal disengagement, these include

- Open competition—an ominous sign, but we are most hopeful when partners are still competing with each other because this means they're still engaged in the relationship
- Unresolved, continuing power struggles
- Dysfunctional, triangular communication—here a third person is used to absorb feelings that are judged to be undiscussable with the "other"
- Broken promises
- Silence
- Absence—the most damning indication that a partnership is irreparably fractured

To avoid this depressing cycle, the most important first step two potential partners can take is to initiate a conversation during the *Exploratory Phase.* Specifically, to begin their relationship in a solid way and to ensure its sustainability, both partners must have the appetite and the skill to recognize—and talk about— what they notice about each other's *status, motive,* and *competence*, and how this awareness is likely to affect their working relationship in the future.

Successful partnerships are thus based on a special blueprint of relationship requirements. Beyond the *Exploratory Phase* and throughout a *Partnership Phase,* to maintain a successful partnership, individuals must also consciously monitor both competitive and collaborative *impulses* in themselves and in their relationship and then also consciously balance competitive and collaborative *behaviors*. Achieving this balance is critical, because if people in partnership begin to compete with one another more than they collaborate, then the dynamics of winning will consume their working relationship. And unfortunately, if one or both partners concentrate on winning as they work with each other, with colleagues, and with customers, then both will ultimately lose the partnership. The answer? To make a key agreement: to mutually *increase* behavior that both partners experience as collaborative, and to mutually *manage* behavior that they experience as competitive.

We need to be clear here. The urge to compete, to win, is a useful, powerful force in most business situations; the desire to win seems to be a core component of human nature; and we don't believe that we can eliminate it from human interaction. We also know that competition has some unintended consequences that can influence human emotions and behavior in

unfortunate ways (Kohn, 1986). By definition, a partnership is created to capitalize on the synergies unleashed by "working with." When people begin to compete with one another, the focus shifts from relationship performance to individual performance, and people are concerned about themselves, not about their relationship. Thus, if people are not willing or able to control their competitive impulses and behaviors in the best interest of their working relationship, a partnership may limp along, but it will never be truly successful or stable.

Once partners recognize the need to operate within this balance, they are free to use their collaboration as a strategy to win externally, to dominate whatever external competition they face together. Fortunately, one of the effective and efficient ways to achieve this dynamic balance is to design work structures that will increase collaboration and manage competition, since in systems dynamics, "structure determines behavior." Fortunately, too, such structural options come in a variety of shapes and sizes. For instance, people can adopt formal or informal agreements about the way they will work together, and these "rules of the road" can be tested and revised until partners feel comfortable. Based on shared values of mutual respect, these "rules" can effectively guide "difficult conversations" during the likely times of conflict (Stone, Patton, and Heen, 1999). Other examples include regular meetings, explicit procedures for managing task requirements, agreements about budget allocations and professional fees, metrics for tracking and measuring partnership performance and reports for documenting it, technology to enable communication, and the co-location of partner's offices and work spaces. We believe that it is less important how people choose to create the correct balance between competition and collaboration than the fact that they recognize the need to create it and work to do so.

MANAGING FAMILIAR PARTNERSHIPS:
THE IMPACT OF CONTEXT AND BOUNDARIES

The *Blueprint for Partnership Development* and its associated competencies provide a roadmap to guide the successful formation of any partnership. For organization development professionals there are some predictable opportunities for partnership that arise in work contexts and that create interesting challenges for their collaboration. Three such possibilities arise for many consultants during their careers. These are pairings of internal and external consultants, of two internals, and of two externals. Each pairing offers the potential for valuable service to clients and satisfying collaboration with each other, and each challenges the partners in several important ways.

In the case of an internal and external consultant pair, an important added structural issue arises from the generic concerns regarding *status* that were described earlier. Since frequently an external consultant is hired to provide additional experience, wisdom and credibility, the challenge to each partner is to clarify and monitor the resulting power balance in the

relationship. It is common for each partner to collude, with or without awareness, in a process of assigning "guru" status to the external consultant. Several common versions of this projection include the "Invited Guest," the "Magical Outsider," and the "Detective" (Norlin & Vogel, 2002). It can be highly functional for partners to recognize differences in their expertise and utilize these effectively; however, it is important that the internal not abdicate power to or become overly dependent on the external. The corollary is that the external must be vigilant to avoid taking over, functioning rather as coach and shadow consultant when appropriate, and generally supporting the long term effectiveness and status of the internal who will, after all, remain as the ongoing resource in the organization. In any continuing collaboration, these issues need to be discussable and the resulting behaviors negotiated to the satisfaction of each and to the benefit of clients.

For the external partner, a second and related consideration is to manage consciously and ethically the normal interest in generating more work; the potential pitfall is to increase the likelihood of continued engagement at the expense of the internal's role. Inherent in this pairing is the different structure of earnings, and we believe that the external consultant is primarily accountable for consciousness and self-management on this matter.

Unique to the partnership of two internal consultants is the handling of the "sibling" relationship that arises from their shared "residence" in the organization. Specifically, they are both imbedded in the cultural context in which competition for promotions, salary increases and bonuses, and reputation may be intense. They need to handle the inevitable anxiety of whether a project will succeed or fail and who gets credit or blame. Further, as two internals, they share the challenge to be simultaneously both insiders *and* conscious managers of the marginal role and boundaries required of OD practitioners; specifically, they need to each be aware of and to assist the other to maintain objectivity, courage and perspective regarding this balance—no small challenge!

When two externals become partners, the dynamics in their relationship are both similar and different to those generated during internal partnerships. In this final pairing, the externals also need to handle "sibling rivalry" for approval of the client but from outside the margin of the organization. In addition, they must carefully monitor the allocation of their fee-based time in order to ensure that the client receives the most for their money.

Finally, whether internal or external, for OD consultants to fulfill the promise of their partnership, they need to develop a regular, high level practice of giving and receiving feedback, thus becoming professional buddies in the ongoing commitment to growth of skills and "use of self." These are the keys to long-term success. In this way, they will be able to fulfill the formal goals of their consulting engagements and also model partnership, an intervention in itself.

A FINAL THOUGHT

In our work with partnership development, it is our experience that successful work partnerships have something in common with other intimate, collaborative performances like trapeze artists, jazz groups, and committed love relationships. When they're really good, they look easy. But this appearance belies the truth: partnering requires courage, superior interpersonal skills, and ongoing commitment to explore deep levels of the self and the other. The process is filled with challenge, but a map such as our *Inner Blueprint for Partnership Development* can serve, we hope, as a useful guide. The payoff when a "working relationship" *works* is worth the effort. ■

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