

CATALYST

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The 3 C's

by Tom Marx and Tom Herndon

In the last issue of Catalyst, we wrote about how to select an advertising and/or public relations agency. Once that marketing partner is on board, how do you keep the partnership fresh, authentic and proactive?

We have found the key is what we call the 3 C's: Communication, Collaboration and Cooperation. We have developed certain practices based on these three principles. Here are some thoughts on the 3 C's:

Communication is the process we use to keep on top of promises, commitments and deadlines, while keeping our eye on the high-level vision that was created as a result of the strategic process.

Collaboration. No longer constrained by the old perceptions of what work is done by the outside agency or the in-house marketing team, the need to mutually execute projects requires a highly collaborative environment. The relationship is not based on who earns the commission or gets the mark-up. It's about how to get the work done in the most efficient and cost-effective manner.

Cooperation. Flexibility, responsiveness and a general sense of 'we're in this together' goes a long way towards having a productive, mutually empowering – and fun – work environment.

So, these principles are fine in theory. What about their practical application? We have developed three simple tools that help our relationships with our clients work better. These, of course, do not cover ALL of the bases, but they're a good start:

1. The Action List
2. Parking Lot
3. The Beachball

The Action List

This simple document outlines the projects that are current, as well as those that are known to exist in the future. It includes brief descriptions of projects, next steps, project manager and timeline. The Action List is not just an internal document – it's a document to be shared within the marketing team or between the marketing team and its outside agency.

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Without the Action List, breakdowns can occur when someone takes their eye off a commitment and suddenly is reminded of a pending deadline. Logical steps to complete a project are tossed aside and the mad rush to get it done occurs. There are some simple steps to implementing an effective Action List.

1. One person maintains the document and is accountable for gathering information and updates from their team(s).
2. The Action List is shared within the team and between teams on a regular basis.
3. 'A regular basis' is determined by the frequency of status meetings within the team or between teams. These may be weekly, bi-weekly, or monthly, depending on the nature of the work involved.
4. Once the Action List is updated, it's emailed back to all team members.

This may sound simple, and there are two important elements. One is to keep everyone on track by having regularly scheduled conference calls and/or meetings. Two is to use the Action List as part of the agenda for these calls/meetings. With practice, cooperatively managing your time and projects becomes one seamless process resulting in improved communication.

You might already have your own collaboration tool(s), however, if you don't, email Tom Herndon at therndon@themarxgrp.com and he'll send you a simple Action List format you can use.

The Parking Lot

The Parking Lot is a simple way to capture ideas, concerns and conversations that are important and need attention – but at a later time – such as later or after the meeting/call, or during a future meeting/call. It works best if someone immediately scribes the points on a whiteboard or Chartpack sheet, so everyone can see it during a meeting. This can also be done on-line, followed up by emailing the document to all involved.

While working on a specific project, related concerns come up for people all the time. The Parking Lot is an effective place to capture the ideas/concerns while maintaining focus on the current project/topic. By writing the items down in plain view, people feel listened to and are able to let go of their concerns, and this allows them to be present to the current conversation. They have the confidence that their point is not being dropped, but merely set aside for now.

At the end of the meeting, the leader quickly reviews the items in the Parking Lot and those present agree on who is responsible for implementing the next (set of) action(s), and by when.

Regardless of how you use the Parking Lot, the information must be captured and included as part of the meeting notes that are sent to all participants. And the person responsible for handling an item must be accountable to handle the concern or idea. This helps build trust within the team and confidence in the players.

The Beachball

The concept behind The Beachball is that we usually consider first the perspective that we can see. We seldom, or at least not as easily or as quickly, consider another's point of view. This simple tool came to us as a result of a planning session we do on an annual basis, a great program called *Best Year Yet*, that we did with Paul Cooperstein, president of the consulting firm Momentum (www.businessmomentum.org).

Imagine a beachball that has one half of the ball in black and the other half in white. If four people stand in a square and one person holds the beachball in front of them, what does each see? The person holding the ball sees black. The person opposite sees white. The person to the right of the one holding the ball sees black on the left and white on the right, and her opposite sees white on the left and black on the right.

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Each person sees the beachball the way they see it. For them, the beachball only looks one particular way. Get the picture? It's very easy to only see our perspective, and often more difficult to see someone else's perspective.

There are some practical applications for The Beachball concept in conversation. We did not learn these overnight, but they really have an impact on our ability to let go of our own perception and be open to someone else's.

1. When one of us senses that their idea is not getting through, we'll interrupt the conversation and simply ask, "Is this a beachball conversation?" This allows people to take a breath, step back, and consider the situation from the other's point of view. Often we discover that both parties are saying the same thing (on the same page, as it were) but were coming at it from a different perspective. A mood of harmony more quickly replaces one of conflict.
2. Sometimes we'll take an actual beachball with us to meetings that we are facilitating, explain the process, and use it when conflict arises or if we're stuck because we're not hearing someone else's perspective.

Overall, understanding the theory and practice of The Beachball, has helped us get 'un-stuck,' enabling everyone to reach a mutually agreeable resolution much faster.

How have you incorporated the 3 C's into your work life? We'd enjoy hearing your ideas.

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