

Readiness Checklist

How ready are we to initiate the partnership?

P·ACT

**How ready are
we to initiate the
partnership?**



Pre-requisite tools:

- Drivers Pyramid
- Value Proposition
- Value Chain Map
- Balance Sheet

Next tools:

- Depending on diagnostic

Readiness Checklist

How ready are we to start the partnership?

Impact-driven partnerships require a strong level of commitment on the part of each partner as failure can have dire consequences on stakeholders including customers, impact beneficiaries as well as on the partner organizations. Each partner needs to be equally ready to engage, and have a sufficient level of urgency to justify initiating the partnership. This tool enables partners to verify that they have achieved the key milestones for developing a sound partnership plan before initiating their partnership.

Readiness Checklist [Mural template](#)

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Why should we use it?

To assess the partners' readiness to initiate a partnership.

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What will we accomplish?

Assess if all partners are equally ready to initiate the partnership

Evaluate the level of urgency for the partnership to each individual partner

Identify and address gaps and barriers in each partners' readiness to initiate the partnership

Step-By-Step

Step 1

Self-assess
readiness
and urgency



Step 2

Discuss and
address
gaps



Step 3

Review the
partnership
model

Step 1:

Self-assess readiness & urgency

1.1 Each partner needs to be equally ready to engage. Use the self-assessment spreadsheet individually to assess your **organizational readiness** for the partnership.

- **Clarity:** Are we clear on our respective motivations, expectations and capabilities?

- **Convergence:** Are we aligned on what we will achieve together, for whom and how?

- **Capacity:** Can we mobilize the people and resources necessary for the partnership?

- **Confidence:** Are we confident in the partnership we co-designed and in our collective capacity to implement it successfully?

1.2 In addition to readiness, partners need to have enough urgency to initiate the partnership. Individually complete the self-assessment of your **organizational urgency** for the partnership.

1.3 Reflect on your responses:




- ? Is our organization **ready** to commit to this partnership? What areas of readiness should we address before engaging? How might we do so?
- ? Is this partnership urgent enough to move ahead now? What would make this partnership more urgent? When may these conditions be in place?
- ? What other key takeaways can we conclude from completing this self-assessment?



Step 2:

Discuss and address gaps




2.1 Share your self-assessment with your partner. Take a few minutes to independently review your partner's responses.

-  Did anything surprise you?
-  How does your partner's overall readiness to partner compare to your own?
-  How does your partner's urgency to partner compare to your own?

2.2 Once you have reviewed each other's checklists, go back to each area of readiness. Identify those areas for which either partner has identified a low level of readiness or urgency. Then, together discuss the level to which each of these areas represent a barrier for moving forward with regards to the partnership.

- **Deal breaker:** The partnership can NOT move forward while this barrier exists.
- **Major Barrier:** The partnership can ONLY move forward if there is a solid plan to address this barrier.
- **Minor Barrier:** The partnership can move forward DESPITE the existence of this barrier.

2.3 For each of the identified barriers, have an open dialogue with your partner about the following questions and record your ideas and decisions:

-  What are the key barriers we need to absolutely address before we can commit to initiating this partnership?
-  How might we eliminate or reduce these barriers?
-  How will we know that these barriers are sufficiently resolved to move forward?

Worksheet:

Self-Assessment | Readiness - Clarity

1. Clarity

Click on the link to access the [spreadsheet](#):



READINESS - CLARITY	To what extent do you agree with the following statements?	Partner 1	Partner 2	Assessment	Discussion Notes
Drivers	We can clearly identify and prioritize the drivers for our organization to engage in this partnership				
	We can clearly identify and prioritize the drivers for our partners to engage in this partnership				
Capabilities	We can clearly define our criteria for selecting our partners and how they respond to these criteria				
	We can clearly define our partner's criteria for selecting us as a partner and how we respond to these criteria				
Value	We can clearly define the value of this partnership to our partners				
	We can clearly define the value of this partnership to our organization				
Costs	We can clearly define the costs of this partnership to our partners				
	We can clearly define the costs of this partnership to our organization				
Culture	We can clearly identify our similarities and differences in terms of organizational culture and understand their potential implications on the partnership				

Worksheet:

Self-Assessment | Readiness - Convergence

2. Convergence

Click on the link to access the [spreadsheet](#):



<u>READINESS – CONVERGENCE</u>	<i>To what extent do you agree with the following statements?</i>	<i>Partner 1</i>	<i>Partner 2</i>	<i>Assessment</i>	<i>Discussion Notes</i>
Partnership type	<i>We have aligned with our partners on the type of partnership (type I, II or III) to pursue</i>				
Value proposition	<i>We have aligned with our partners on the partnership customers and its value proposition</i>				
Social impact	<i>We have aligned with our partners on the social impact targeted by the partnership (beneficiaries, outputs, outcomes, impacts)</i>				
Value chain	<i>We have aligned with our partners on the value chain to deliver the partnership value proposition</i>				
Value & Cost share	<i>We have aligned with our partners on our respective share of capturing value and assuming costs of the partnership</i>				
Governance structure	<i>We have aligned with our partners on a governance structure for the partnership</i>				

Worksheet:

Self-Assessment | Readiness - Capacity

3. Capacity

Click on the link to access the [spreadsheet](#):



READINESS – CAPACITY	To what extent do you agree with the following statements?	Partner 1	Partner 2	Assessment	Discussion Notes
Partnership activities	We have clearly defined the activities our organization will execute as part of the partnership				
Staff capacity	We have secured the staff capacity (number, skills and time) to execute our part of this partnership				
	We have secured the staff capacity (number, skills and time) to manage this partnership				
Resources	We have secured the resources (financial, infrastructure, relational...) necessary to execute our part of this partnership				
Processes	We have established the processes in place (due diligence, legal, regulatory, relationship management...) to support and manage this partnership				

Worksheet:

Self-Assessment | Readiness - Confidence

4. Confidence

Click on the link to access the [spreadsheet](#):



<u>READINESS – CONFIDENCE</u>	To what extent do you agree with the following statements?	Partner 1	Partner 2	Assessment	Discussion Notes
Leadership buy-in	We have secured the commitment of our leadership to engage in this partnership				
Performance management	We have strong confidence in our strategies to ensure the performance of this partnership				
Risk management	We have strong confidence in our strategies to mitigate the risks of this partnership				
Partner capacity to execute	We strong have confidence in our capacity to execute our part of the partnership				
	We strong have confidence in our partners' capacity to execute their part of the partnership				
Relationship	We have strong confidence in the resilience of the relationship with our partners				
Governance structure	We have strong confidence in the governance structure to resolve any potential issues along the way				

Worksheet:

Self-Assessment | Readiness - Urgency

5. Urgency

Click on the link to access the [spreadsheet](#):



READINESS - Urgency	To what extent do you agree with the following statements?	Partner 1	Partner 2	Assessment	Discussion Notes
Strategic Goals	<i>This partnership helps us achieve one or several of our short-term strategic goals</i>				
Problem to Solve	<i>This partnership helps us solve an urgent problem or need</i>				
Pressures	<i>This partnership helps us respond to urgent stakeholder (employees, investors, civil society...) pressures</i>				
Competing Priorities	<i>This partnership does NOT compete or conflict with other strategic priorities for our organization</i>				
Competing Partners	<i>This partnership does not compete or conflict with other potential partnerships</i>				

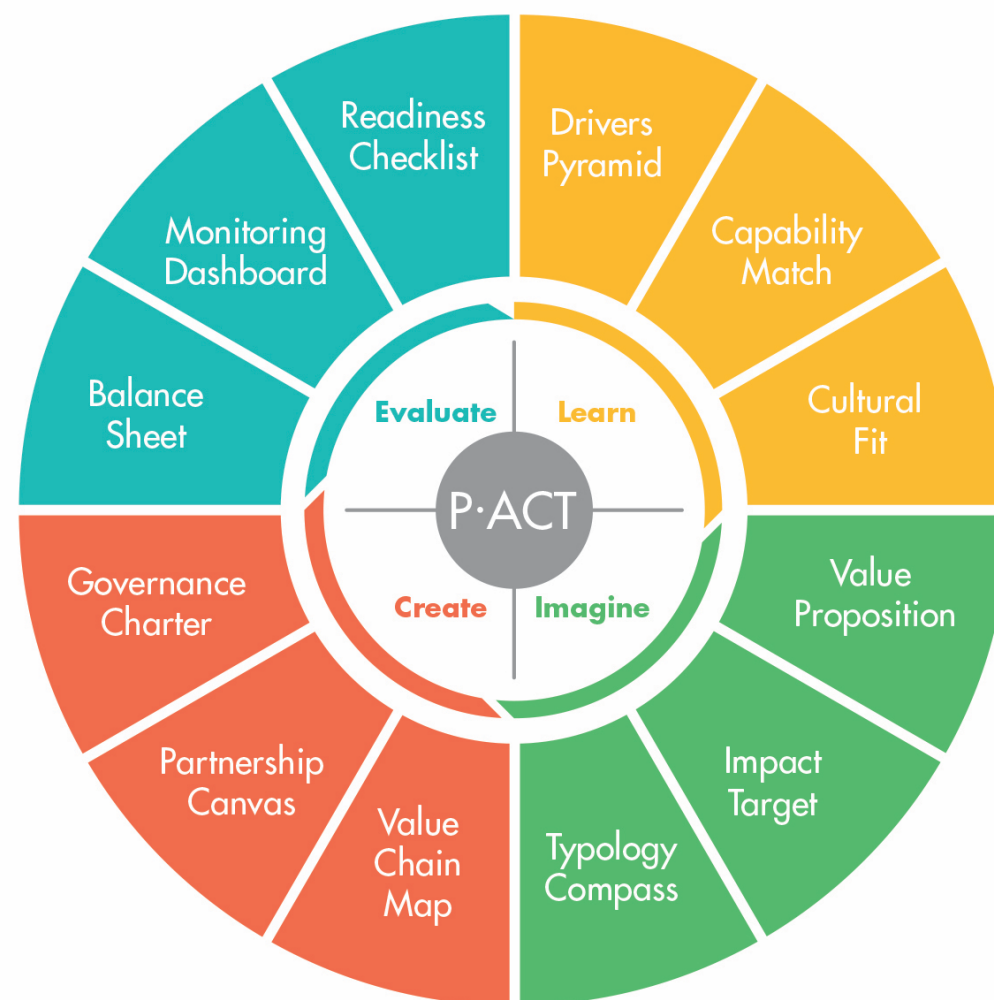
Step 3:

Review the partnership model

To close the loop on your co-design process and complete your Readiness evaluation, reflect one last time on the **partnership model** you have co-designed with your partners:

- ? Does it fulfill the partnership goals set by the partners collectively? - See output of the Drivers Pyramid tool.
- ? Does it create the value proposition expected by the customer? - See output of the Value Proposition tool.
- ? Does it generate the impact expected by or promised to the beneficiaries? - See output of the Impact Target tool.
- ? Does it create the value expected by each partner? - See output of the Partnership Canvas tool.
- ? Does the partnership generate a value to cost ratio that is acceptable to both partners? - See output of the Balance Sheet tool.

If you have established with your partners that you have achieved enough readiness to initiate the partnership, Congratulations! The next step is to start developing your contractual agreement.



Facilitation Tips

Step 1

Individual Self-assessment

- If possible introduce the tool to partners in advance and have them fill in and return it before the workshop. Use their answers to identify particular areas where dialogue can be focused during the workshop.
- Make sure to clearly explain the readiness criteria and the self-assessment Likert scale to all partners consistently so they have a common understanding.

Step 2

Collective reflection

- Explain that it is normal for partners to be more or less ready in different areas. There is no competition for who is the most ready. Encourage candid conversation and suspended judgement.
- Focus dialogue on areas where either partner or both identifies a lack of readiness or urgency.
- Make sure partners are recording any solutions they come up with for improving their respective readiness. Review these together at the end of the workshop and encourage moving them to action.