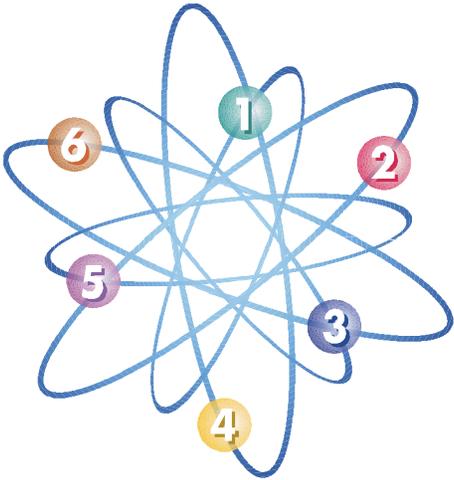




Partnerships for Communication

... or a Guide to Dating



Peter Mitchell
Barney Singer
Vicki Beck

Phase 5



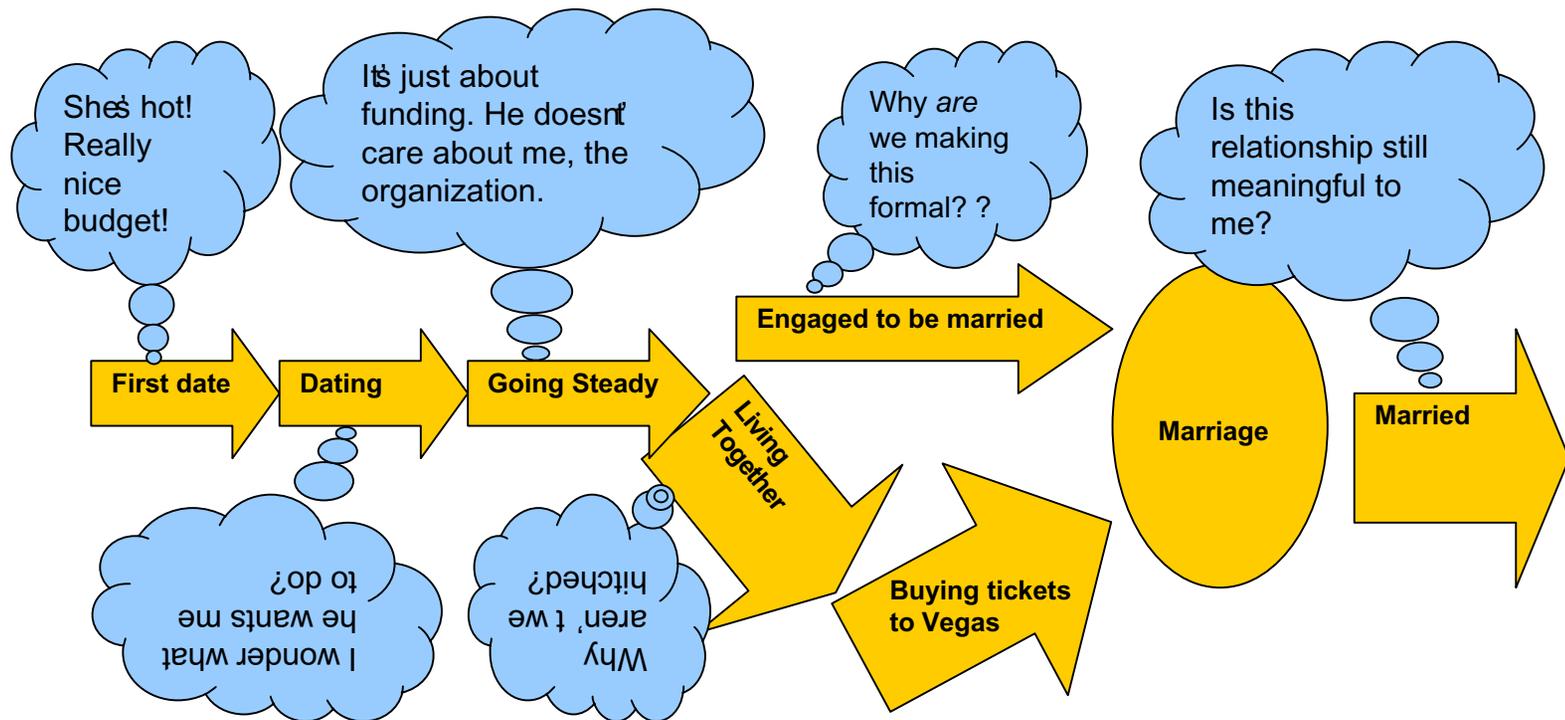
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Section I:

Why Partnerships are Like Dating



Why Partnerships are Like Dating



Why Partnerships are Like Dating

Key issues

- What do you want out of the relationship?
- Who's hot? Who has the right qualities?
- Will the object of your desires be interested in you?
- What does your partner like to do?
- Do you get along?
- Where is the relationship going?
- What do your friends say?
- Maybe we should see a therapist.

Part 1: Selecting a partner

Part 2: Building a partnership
-wooing a partner and choosing a partnership model
-nuances in the private sector
-formalizing the relationship

Part 3: Maintaining a partnership

Part 4: Evaluating a partnership

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Exercise #1

Assignment: Set up a tee time with the president of Emory University.

- *Step One:* Select a partner in this room.
- *Step Two:* Develop a plan
- *Time:* 2 minutes, starting a minute ago.



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Partnership Assessment

Step One:

Decide what YOU want.

Next Question:

Who can help you get what you want?

(It may not be the guy next door.)

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What's in it for ME?



Think

What are two critical benefits of partnerships?



Pair

Turn to the person sitting near you and exchange your thoughts with each other.



Share

Explain to the rest of the group the critical benefits you and your partner identified.

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Partnerships...

- ... complement the reach and frequency of **mass media advertising**
- ... promote the integration of **core messages** into an organization's thinking
- ... provide our target audiences with a **ready mechanism** for acting
- ... tap into each partner's **wisdom and experiences**
- ... provide an opportunity to **extend the impact** of messages over time
- ... help to reach a **specific audience**



CDCynergy Phase II: Problem Analysis

Partners can provide . . .

- Research they have collected or performed
- Access to target populations for research
- Funding for research or analysis
- Needed expertise
- A commitment to work on the next steps of the process.

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CDCynergy Phase III: Program Planning

Partners can offer a commitment to provide . . .

- Access to a target audience
- Dissemination of materials or messages
- Funding
- Media placement or support
- A mechanism for the audience to act
- Technical expertise
- Certain activities or events, or support for those
- Use of a brand or name (to enhance credibility)



CDCynergy Phase IV: Program Development

Partners can provide . . .

- Access to a target population for research
- Expertise for message or material development
- Materials (including creative)
- Evaluation assistance (including baseline information)
- Funding for program development
- Commitments for further assistance

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CDCynergy Phase V: Implementation & Management

Partners can provide . . .

- Access to a target audience
- Dissemination of materials or messages
- Funding
- Media placement or support
- A mechanism for the audience to act
- Technical expertise
- Certain activities or events, or support for those
- Use of a brand or name (to enhance credibility)

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CDCynergy Phase VI: Feedback

Partners can provide . . .

- Another perspective on program activities and results
- Evaluation assistance

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Finding the Right Partner

BIG
name partner

similar
similar

Constituency's
demographics

Enhancement

grassroots
reach

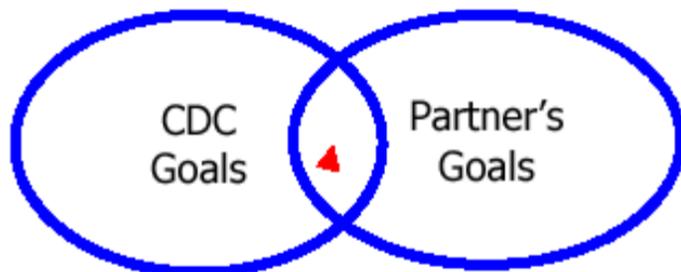
previous
involvement

Synergy

Mobilize!

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How we picture most partnerships

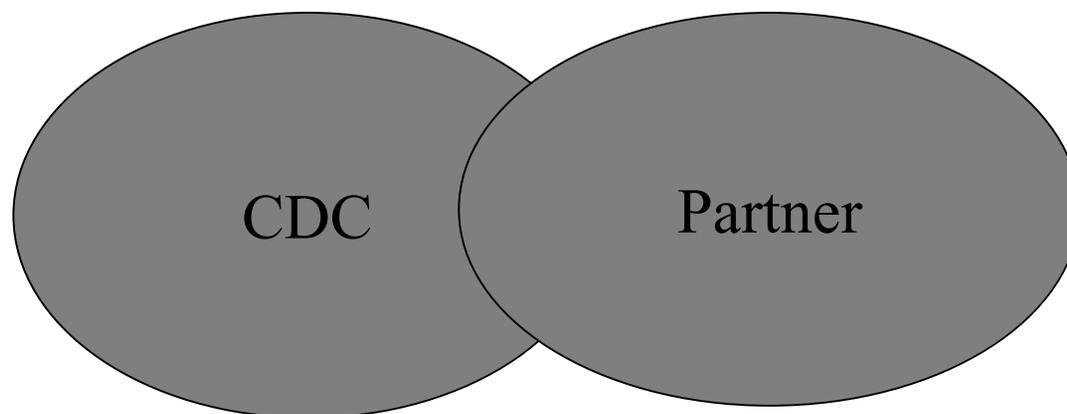


Partnership's Goal

The Reality: Two models

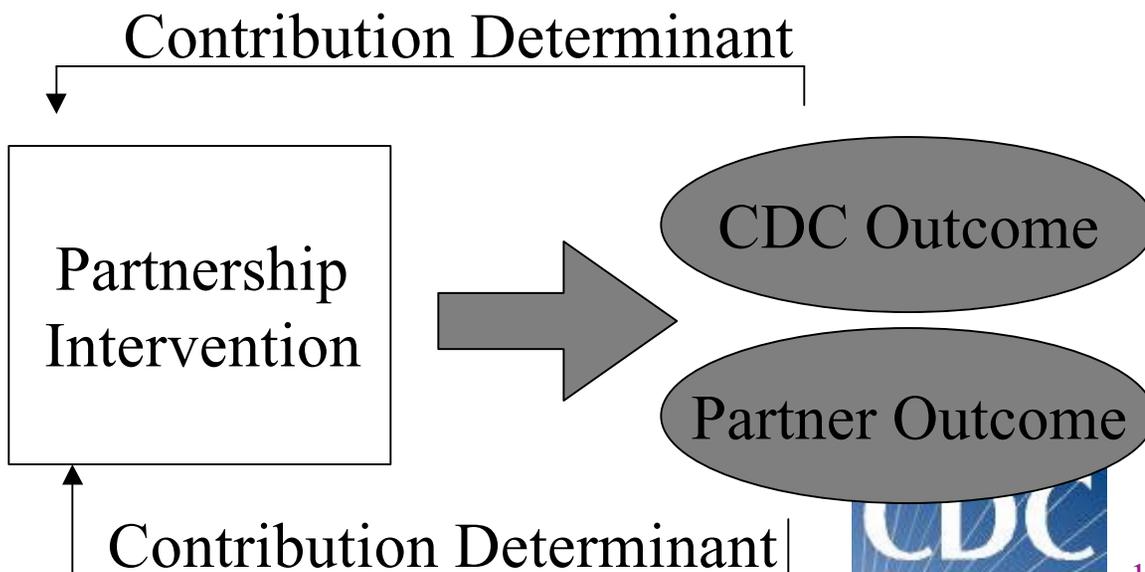
1. Shared Goal

Both parties want the same result.



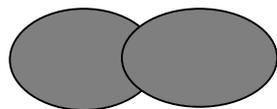
2. Co-occurring Goals

Different results, brought on by the same intervention, benefit each party.

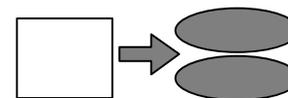


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Where do CDC's partnerships fall?



Shared Goals



Co-occurring Goals

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What partnerships can— and cannot— do

Partnerships can . . .

- Provide funding
- Provide expertise
- Provide access to an audience
- Become a forum for cooperation

Partnerships cannot . . .

- Substitute for strategy
- Be an end in themselves
- Change the behavior of an audience
- Keep everyone happy



Partner Assessment Tool

Potential Partner: _____

Step 1: Determine Your Goals

Your goal(s) for partnership is:

- Access to population
- Credibility/ Use of brand
- Disseminate materials/messages
- Evaluation support/assistance
- Event support
- Expertise
- Funding
- Materials
- Mechanism to act
- Media placement
- Outside perspective
- Research assistance
- Other: _____

Can partner help you reach these goals?

Applicable stages of CDCynergy

- Phase II: Problem Analysis
- Phase III: Program Planning
- Phase IV: Program Development
- Phase V: Implementation
- Phase VI: Feedback

Is partner available at these stages?

Step 2: Match Partner

Identify potential partners using the Universe of Possibilities handout. Then evaluate the match by identifying whether partner shows:

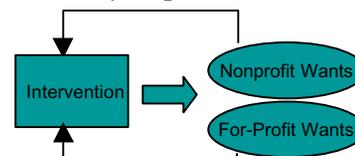
- Significant help with goals likely
- Identical needs
- Same core goal as CDC
- No obvious conflicts
- High level commitment
- Grassroots commitment.
- Significant resources allocated
- Excellent reputation
- Experience reaching this goal
- Similar corporate culture
- Shared vision of partnership
- Access to key target audience
- Funds for CDC goal
- Key skills to offer CDC
- History working with CDC

Match score : _____ of 15.

Is the partner a good match with CDC?

Step 3: Chose model

Chose which type of alliance you plan to build:



or



Main goal for partner

Main goal for CDC

Step 4: Gauge Interest

Consider value of the exchange: What's in it for them? How important is that benefit to partner?

Investigate potential interest with those who know the partner, and the partner itself.

Make a judgment: Is this a match that will work? If so, what kind of commitment is necessary:

- One-time agreement
- Informal arrangement
- Shared long-term plan
- MOU or other binding agreement



Building a partnership requires significant planning up front. This tool can help you assess which potential partners show the most potential for your project.

Partner Assessment Tool

Potential Partner: _____

Step 1: Determine Your Goals

Your goal(s) for partnership is:

Step One: List the goal for creating this partnership. The partnership is a means to an end, not an end in itself. At the CDC, partnership interventions should be identified as part of the CDCynergy planning process. Ask yourself: Who can help me with this specific goal? That is what's most important. Then consider when in the CDCynergy process, the partner needs to be involved.

Step 2: Match Partner

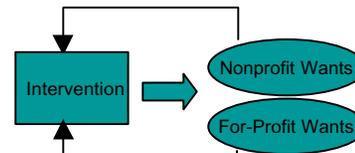
Does the partner have:

- Share

Step Two: Often you must choose between potential partners to decide where to allocate energy and resources. Use this section to help determine if the potential partnership is a good fit. This could help you rank the potential partners. However, you may still want to pursue a partnership with a lower score because of other factors such as size or political considerations.

Step 3: Chose Model

Choose which type of alliance you plan to build:



or



Step Three: Decide what kind of alliance you are building: one where both sides have the same goal or co-occurring goals?

Step 4: Gauge Interest

➡ Consider value of the exchange: What's in it for them? How important is that benefit to partner?
 ⬅

Investigate potential interest with those who know the partner, and

Step four: Finally consider the value of this partnership from the partner's perspective. If you have gotten this far, you know the partnership is important to your goals. Can you stir the potential partner's interest as well?

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Section II:

Going Steady I



Exercise #2: The Pitch

Situation: You are designing a communications campaign. You decide that the American Association for Retired Persons (AARP) could be an important partner.

Your assignment: Convince them to join the effort.



Membership: 30 million, ages 50+

Annual Budget: \$500 million

Activities: Education, community service, advocacy, member services.

Publications:

- Modern Maturity
- AARP Monthly Bulletin



Pitching a Potential Partner

- Make clear your objective
- Know their action and possible determinants
- Offer the exchange
- Know your bottom line:
When does the partnership NOT make sense.

BEHAVE Framework

Target Audience Action Benefits & Barriers Activities

Who? A specific target audience	What? Take a specific action	Benefits & Barriers Benefits & Barriers that influence the action	Activities Selected program activities that address these benefits and barriers
In order to help: _____ _____ _____ _____	to: _____ _____ _____ _____	we will focus on: * maximizing benefits - - * minimizing barriers - -	through: _____ _____ _____ _____
<i>H1. Know exactly who your audience is and look at everything from their point of view.</i>	<i>H2. Your Bottom Line: When all is said and done, the audience's action is what counts</i>	<i>H3. If it benefits them, they'll take an action. Barriers keep them from acting.</i>	<i>H4. All your activities should maximize the benefits and minimize the barriers that matter to the target audience.</i>
<ul style="list-style-type: none"> • Census, school, health dept. data • Focus groups 	<ul style="list-style-type: none"> • Assessments, evaluations • Count & compare 	<ul style="list-style-type: none"> • Doer/non-doer, survey – 7 questions 	<ul style="list-style-type: none"> • Materials pretest • Track • Count & Compare

Evidence

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What drives the alliance

Shared Wants

- Strategy, mission and values alignment
- Shared visions

Results for both sides

- Value creation
- Continual learning

Also: personal connections, politics



Modeling the alliance process

- Initial inputs
 - what the parties bring to the table
- The value proposition
 - what the alliance is trying to do
- Structure and interaction
 - how the players work together
- Proximate output
 - what gets done
- Goal achievement
 - how the alliance is turning out

Source: Alan Andreasen,
Georgetown University.

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How hard they work together depends on:

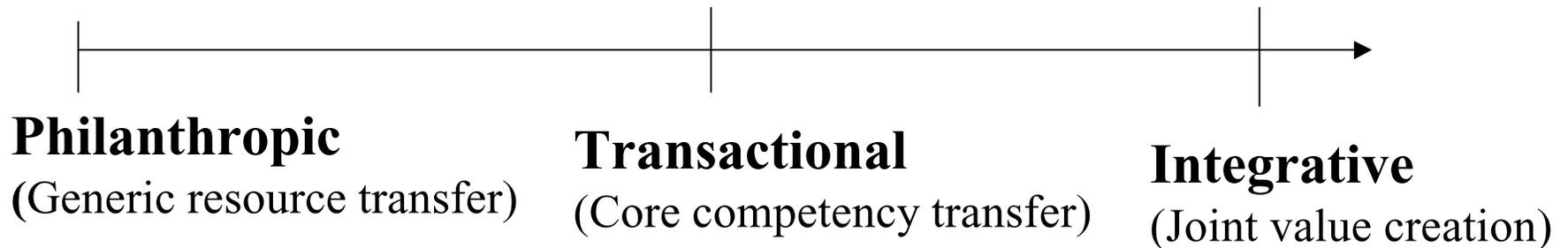
- The importance of the value proposition to each partner's mission
- Commitment of executives to the alliance
- Economic and personnel resources allocated
- Exclusivity of the alliance

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How well they work together depends on:

- Partner inputs
 - reputation
 - experience in other alliances
- Match between partners
 - Culture
 - Size
 - Alliance sophistication
- Expectations
- Complexity of the alliance
- Extent of communications
- Extent and nature of written guidelines

Collaboration Continuum*



Moving along the continuum ...

- Increasing levels of engagement
- Importance to mission becomes more central
- Magnitude of committed resources grows
- Scope of activities broadens
- Interaction becomes more intensive
- Managing becomes more complex

* Source: James E. Austin, *The Collaboration Challenge*, forthcoming



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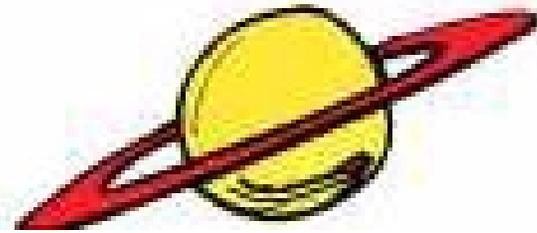
Partnership Models

- Structural
- Programmatic
- Contractual

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Universe of Possibilities

- Partner Types
- Commitment Levels
- Purposes and Activities



Universe of Possibilities

Partner Types

Government agencies

- Federal agency
- State agency
- Local agency
- Foreign country

Non-profit organizations

- Community group
- Foundation
- Educational/research institution
- Professional/trade association
- Faith group
- Advocacy organization
- Scholarly journal

Commercial organizations

- Hospital/Clinic
- Managed care organization
- Media/Entertainment
- Celebrity
- Retailers
- Research agencies
- Advertising agencies
- Smaller private business
- Other corporation

Universe of Possibilities

Purposes (from CDC POV)

1. Activities to access specific target audience

- Co-host event
- Appear at event
- Joint press conference
- Appear at press conference
- Jointly publish materials
- Disseminate materials
- Contribute to newsletter/publication/video (placement)
- Get newsletter contribution
- Exhibit at gathering
- Shared training/program
- Assist in program development/serve on advisory group
- Integration with professional education program

2. Activities to disseminate materials/message

- Joint press conference
- Other publicity/PR
- Jointly publish materials
- Share in media buy
- Dissemination funding
- Tap partner's dissemination channels
- Production of communication product
- Use in professional education

Universe of Possibilities

Purposes (from CDC POV)

3. Activities to enhance credibility

- Joint press event
- Co-host event
- Shared training/program
- Co-branding
- Serve on advisory committee/assist in program planning

4. Activities to support research

- Access audience for research (e.g., pre-testing, formative)
- Use research facility/staff
- Tap existing research tracked by partner

Universe of Possibilities

Purposes (from CDC POV)

5. Activities to create mechanisms for audience to act

- Private sector mechanisms
- Public sector mechanisms
- Grassroots mechanisms

6. Activities to gain technical expertise

- Production assistance
- Personnel swaps
- Tap partner's expertise for briefing/information
- Coordination
- Technology transfer
- Logistical support
- Provide public health service

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Universe of Possibilities

Purposes (from CDC POV)

7. Outreach/Education activities

- Conduct efforts in the policy arena
- Public health activities
- Production of communication product

8. Funding

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Universe of Possibilities

Commitment Levels

- Short-term informal
- One-time agreement
- MOU or otherwise contractual

Exercise #3: The Informed Pitch

Situation: You are designing a communications campaign. You decide that the American Association for Retired Persons (AARP) could be an important partner.

Your assignment: Find out more, then convince them to join the effort.



Membership: 30 million, ages 50+

Annual Budget: \$500 million

Activities: Education, community service, advocacy, member services.

Publications:

- Modern Maturity
- AARP Monthly Bulletin



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Section III:

Going Steady II





Private Sector Realities

Top ten questions at most companies

- Are we making money?
- Are we selling a lot of stuff?
- How much money are we making?
- Are sales up?
- Is it turning a profit?
- How are the quarterly revenue figures?
- Did I ask about how much money we're making?
- Do we look good? Don't want people not to buy our stuff because they don't think we look good.
- Is it generating revenue?
- How can we sell more stuff?

Show
me the
money!



Commercial vs. Social Marketers

Commercial marketers	Social Marketers
Want to make money	Want to do good
Funded by taxes, donations	Funded by investments
Publicly accountable	Privately accountable
Performance hard to measure	Performance measured in profits, market share
Behavioral goals long term	Behavioral goals short term
Often target controversial behaviors	Non-controversial products/services
Often high risk targets	Accessible targets
Risk averse managers	Risk taking managers
Participatory decision making	Hierarchical decision-making

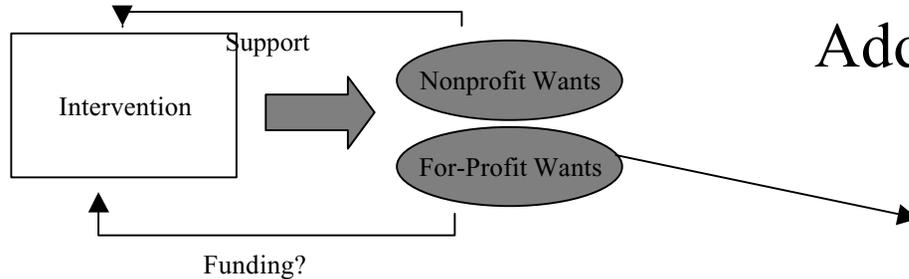
Source: Alan Andreasen, Georgetown University.



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Social marketer satisfaction will be due to:

- Increase in economic resources
- Increase in skills
- Support by key stakeholders
- Changes in behavior
- Adding dissemination channel



Commercial marketer satisfaction will be due to:

- Increased sales
- Increased employ satisfaction
- Improved/changed reputation
- Support by key stakeholders



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What do they really want?

What they offer

- Co-sponsor an event or message

What it means

- Using CDC's brand and reputation

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What do they really want?

Translate the following:

“I don’t think you want to put that on the package.”



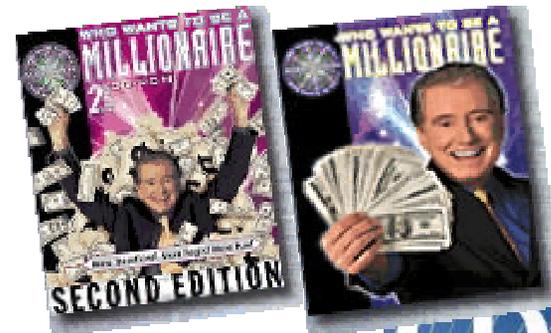
Who (at the CDC) Wants to Be a Millionaire?

For \$100:



Which of the following organizations are engaged in cause marketing?

- American Cancer Society
- The Nature Conservancy
- Care
- All of the Above



* Assuming good guys finish first

Phase 5





Who (at the CDC) Wants to Be a Millionaire?

For \$1,000:

The amount spent annually on cause marketing is ...

- \$75 million —
- \$100 million
- \$750 million
- More than \$1 billion





Who (at the CDC) Wants to Be a Millionaire?*

For \$10,000:

Which of the following companies considered placing the CDC logo on its product?

- R.J. Reynolds Tobacco
- Kraft
- Kellogg
- Reckitt & Coleman





Who (at the CDC) Wants to Be a Millionaire?*

For \$100,000:

What group shares its television time with groups airing messages that reinforce that group's themes?

- Disney Co.
- Office of National Drug Control Policy
- National Coalition of Churches
- Pat Buchanan's presidential campaign





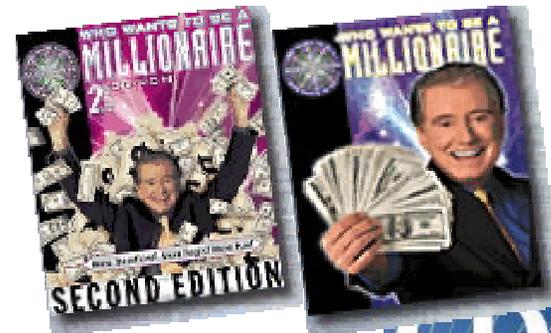
Who (at the CDC) Wants to Be a Millionaire?*

For a big kiss from the surgeon general:

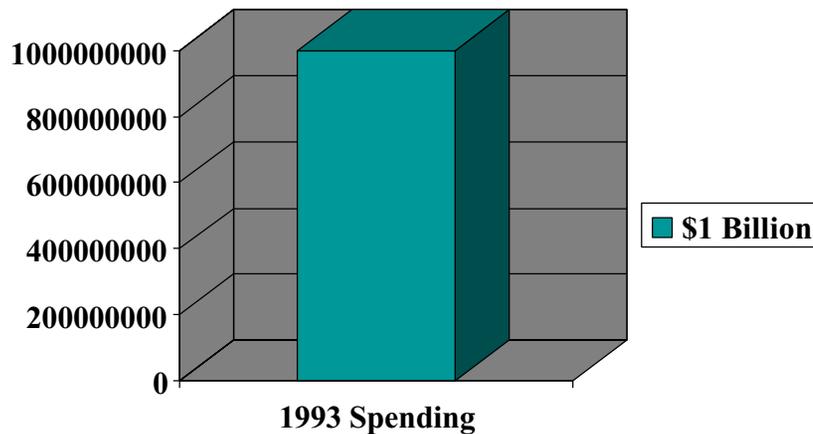


Which of the following organizations has not partnered with the American Cancer Society?

- Smithkline Beecham
- Fl. Dept. of Citrus
- Johnson & Johnson
- American Lung Association



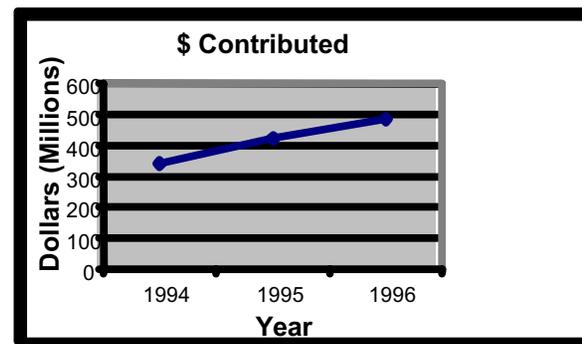
Cause-Related Marketing



\$1 billion spent annually on “cause-related marketing”

- **History.** In 1983, American Express donates 1 cent of every card purchase to renovating the Statue of Liberty. Result: \$1.7 M for renovations ... and 28% jump in card usage!

- **Growth.** Up 150% between 1990 and 1993. Contributions rise from \$340 M in 1994 to \$535 M in 1998.



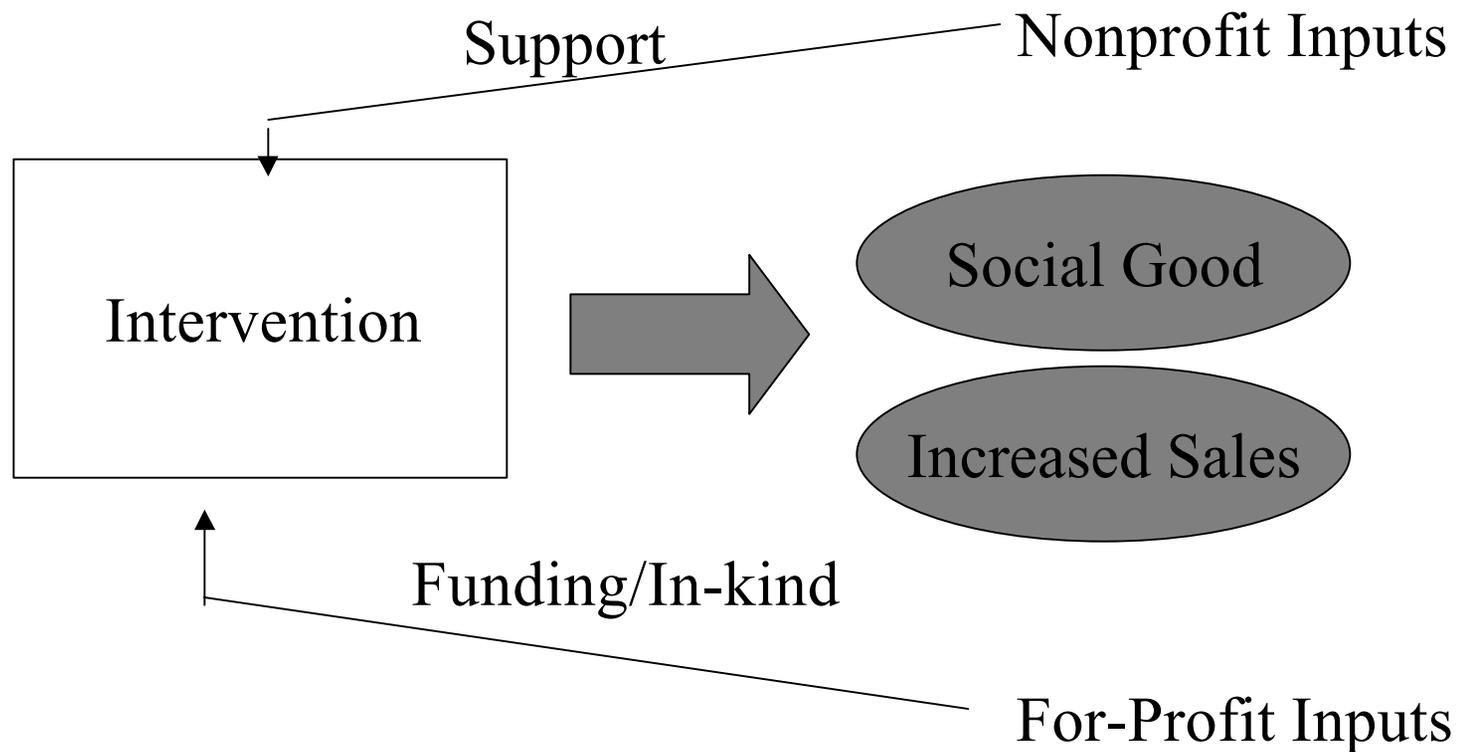
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Types of CRM

- **Basic Donation** (Use product, prompt manufacturer donation)
- **Service Exchange** (Use service, get help with service)
- **Behavior Reward** (Do behavior, get product or service)
- **Sponsorship/Publicity** (For example, creating PSAs)
- **Use of Brand** (For example, adding logo to product)
- **Licensing Agreement** (One party sells other's product)
- **Old fashioned donation.** (For-profit makes monetary donation made in exchange for intangible (good will, reputation))

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How CRM is supposed to work



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Does it matter? Sometimes.

- Consumers' purchase intentions are significantly affected by "corporate social responsibility" (Cone/Roper Survey 1996)
 - 2/3 would switch brands; ↓ consumer skepticism

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But not always...

- C.B. Bhattacharya (Boston Univ. School of Management) wanted to know what mechanisms underlie consumer reaction to “corporate social responsibility” (CSR) initiatives.
- Examines how consumer reaction to CSR vary with characteristics of the:
 - company
 - consumer
 - campaign

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From the corporate perspective

- Much heterogeneity in consumers' reaction
 - under certain conditions, CSR initiatives can *decrease* purchase intentions
- CSR initiatives in certain domains can influence consumers' perceptions of corporate ability
- Perceptions of congruence between own and company's "character" underlie consumer reactions to CSR

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Implications for Social Marketers

- Be clear about what corporate partner is expecting from the alliance
 - favorable company evaluations achievable. Possibly, positive long term enduring effects
 - purchase propensity needle much harder to move: depends on the “business” of the social partner, the product quality of the corporate partner and consumers’ support of the initiative
- Emphasize to corporate partner, the importance of communicating “win-win” nature of alliance to customers

Source: C.B. Bhattacharya, Boston Univ. School of Management



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Benefits of Cause Marketing

Non-profit

- Money/fundraising
- Other resources
- Awareness of campaign or agency

For-profit

- Increased sales
- Better corporate image
- Differentiate in the marketplace
- Brand loyalty
- Long-term customer relations
- Internal corporate purpose



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Horror Stories

How the nice people at the American Cancer Society found themselves on the wrong end of an attorneys general investigation.

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Ethical Issues: Using the CDC Logo

- Logo implies product is “tested” by endorser.
- Logo implies guarantee of quality.
- Logo gives one brand a leg up in the marketplace.

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Section IV:

Legal Issues and Binding Agreements



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What do we know so far?

- Goals
- Target Audience
- Partner(s)
- Project Description
- Content
- Dissemination
- Roles and Responsibilities

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How do we capture
the main points of
understanding among
the people involved?



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Do we need a formal agreement?

- Is there relevant CDC guidance or policy statement?
- How many people/partners are involved?
- Is there legal significance to anything being discussed?
- Will CDC be obligated in any way?



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CDC Guidelines: Pvt Sector

How does CDC define a collaboration?

An interaction between CDC and one or more private sector organizations in which both parties work together to carry out their missions.

Voluntary situations only

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What's the Private Sector?

The term "private sector" includes both for-profit and not-for-profit organizations.

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What's the Private Sector?

For Profit

- Corporations
- Partnerships
- Proprietorships
- \$\$\$ Gain

Not-for-Profit

- Associations
- Foundations
- Civic Groups
- Universities
- Unions

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Underlying Principles

- public health decisions must be based on sound science and the public good
- benefits to society must be a higher goal than the benefits to any party
- the agency must be a diligent steward of public trust and funds
- the agency and employees must adhere to ethical standards

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Possibilities

- Technology Transfer
- Public Education
- Professional Education
- Applied Research or Evaluation
- Provision of Public Health Services

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Considerations

- Criteria
- Direct versus Indirect Relationships
- Endorsements
- Credibility
- Review Processes

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CDC Documents

- Guidance
- MOU
- Copyright

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Avoid this.



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Section V:

Maintaining Productive Relationships

(or “Stories my divorce attorney never told me”)



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Scruples Game

Ethical dilemma #1:

Seagrams v. Budweiser v. Philip Morris

Ethical dilemma #2:

A partner pitch.

Ethical dilemma #3:

What to tell your partner – and when.

Ethical dilemma #4:

Your impact on the marketplace.

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Top Ten Things You Dont Want to Hear Your Partner Say:

10. “I’m sorry. I forgot to tell you. You know those video tapes you just sent out to air on every television station in the known universe. We don’t have rights to that.”

9. “Philip Morris is paying for all the banners. Isn’t that great?!”

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Top Ten Things You Dont Want to Hear Your Partner Say:

8. “I’ve been fired”
7. “We thought you were paying for that.”
6. “Or yes, that just needs to go through the approval process. We expect it to emerge around 2010, assuming no one finds a problem.”

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Top Ten Things You Dont Want to Hear Your Partner Say:

5. “No, we won’t be at the press conference this morning.”
4. “You’ll be working with Joe. He works in the mail room.”
3. “Guess what? We finally placed that PSA on testicular cancer. It’s going to run on Lifetime!”
2. “We just have 67 more questions about your specific goals.”

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Top Ten Things You Dont Want to Hear Your Partner Say:

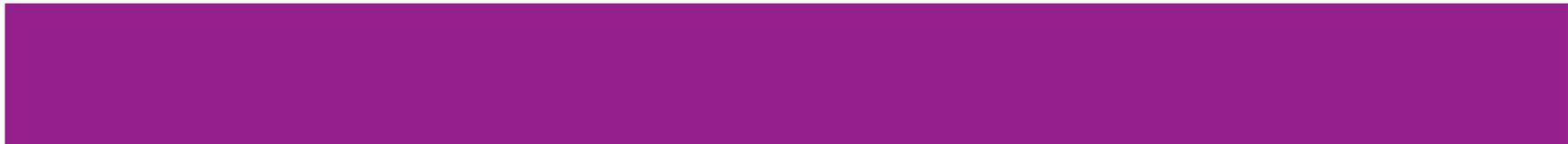
1. “Goodbye!”

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Maintenance Factors

- The centrality of an integrating vision
- Similarity of norms and organizational culture
- Transparency of decision-making
- Perceived equivalence of power
- Compatible organizational systems
- Capacity to establish and sustain a working framework
- Effective system for dispute resolution
- Leadership commitment
- Sense of social responsibility

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Maintenance & Repair Guide

- Breadth of involvement by partner
- Length of time for approvals
- Number and types of questions raised
- Misunderstandings

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Maintenance & Repair Guide

At...

Start-up, 3 months, and 6 months/future service calls...

Assess...

Ethical Filter

Staff

Marketing Plan

Fuel Tank

Partnership Plan

Advisory Group (optional)

Written Agreement (necessary only in higher-end models)



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Section VI:

How Are We Doing?





Evaluating Partnerships

- Think about a past or present relationship you've had with a **sweetheart, colleague, or friend.**
- Think of two things you know about that person now that **you didn't know before.**
- What **questions** do you wish you could have asked that person that could give / could have given you a **better understanding** of that relationship?



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Partnership Mutual Assessment Tool

- Parity of Perceptions of Vision/Roles
- Satisfaction

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Section VII:

Long and Winding Road



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Thank you!

