



# BEHIND THE SCENES



# 1 DEFINING SCOPE AND OBJECTIVES

- What services are being offered
- What expertise is being shared
- What the goals of the collaboration are (e.g., co-delivery, knowledge exchange, joint innovation)

This often involves:

- Strategic planning
- Internal briefings
- Client or partner requirement analysis

# 2 IDENTIFYING THE RIGHT PARTNERS

They select collaborators based on:

- Complementary expertise or capabilities
- Shared values or standards (e.g., quality, ethics)
- Experience and reputation in the domain

This could involve:

- Vetting through past work, references, or certifications
- NDA or MoUs to protect proprietary knowledge

# 3 ROLE AND RESPONSIBILITY MAPPING

Behind the scenes, teams create:

- RACI matrices (Responsible, Accountable, Consulted, Informed)
- Task breakdowns
- Defined deliverables and timelines per party

# 4 COMMUNICATION FRAMEWORKS

Successful service collaborations often include:

- Kickoff meetings
- Regular sync-up calls
- Use of collaboration tools (Slack, MS Teams, Notion, etc.)
- Shared documentation platforms (Google Drive, SharePoint, Confluence)

# 5 KNOWLEDGE SHARING & INTEGRATION

If the service involves specialized knowledge (legal, medical, IT, consulting, etc:

- Internal teams prepare knowledge packets or training
- Cross-training may occur so both teams understand each other's domain

Teams align on terminologies, processes, and KPIs

# 6 OPERATIONAL COORDINATION

This includes:

- Joint project management (Agile, Waterfall, etc.)
- Risk management protocols
- Clear escalation paths

Back-end systems might be integrated or synced:

- CRMs, ERPs, support ticketing, and scheduling tools

# 7 QUALITY CONTROL & COMPLIANCE

Especially in specialized sectors  
(healthcare, finance, IT), compliance is  
critical:

- Audits
- Standard operating procedures (SOPs)
- Legal checks
- Data privacy and IP protection measures



# 8 PERFORMANCE MONITORING & FEEDBACK

Regular reporting and performance reviews help both parties stay aligned:

- Use of shared dashboards (Power BI, Tableau)
- KPIs tracked jointly
- Feedback loops to improve service delivery

# 9 PROJECT CLOSURE OR EVOLUTION

Once a project or collaboration phase ends:

- Knowledge is documented
- Lessons learned are recorded
- Future opportunities are evaluated



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