Planning is the key to action. Whenever you are thinking of collaborating with a competitor, always start with thinking through the action plan below:

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| **Project:**  *What is the goal? Collaborate with a competitor firm?*  |
| **Purpose: What do you want to accomplish?** | **Success Criteria: What steps do you need to take as you move through the process?**  |
| *What do you want to accomplish? Training of staff? Growth strategies? Connection for a particular niche or service?*  | 1.2.3.4.5.6.7.8.9.10. |
| **Importance: What’s the biggest difference this will make?**  |
| *Why is this important to you or your firm? The clearer you are on the benefits, the more value you will feel.*   |
| **Ideal Outcome: What does the completed project look like?**  |
| *If everything comes out the way you hope, what does the final outcome look? Vision is the key to success.* |