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

|  |  |
| --- | --- |
| **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.* |