Research Summary
Six Industry Sectors
2001 - 2018

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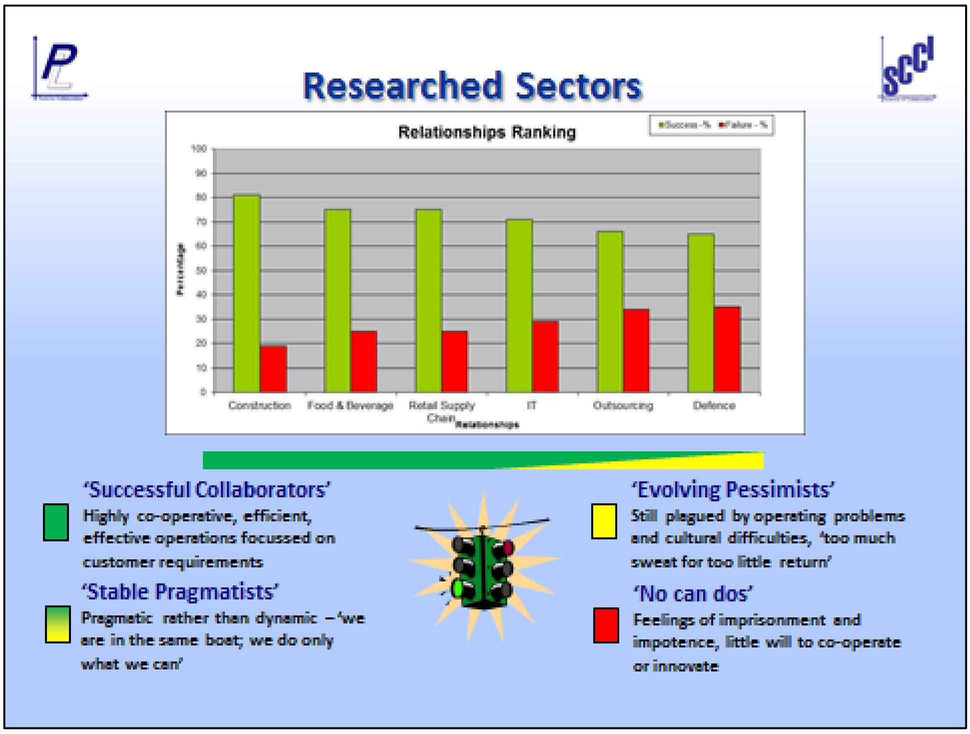
Research Summary – Six Industry Sectors

Background

Between 2001 and 2018 we examined 123 major collaborative relationships (200+ organisations) within 6 industry sectors. This report summarises the findings from our research. It does not concentrate on the individual sectors but rather on the common relationship management features which impact performance. Furthermore, the relationships were exclusively within the Operations Phase, there were none within the Decision and Exit Phases.



The relationship performance of the 6 sectors is compared in the chart above. On the basis of manager surveys half appear to be pragmatic rather than dynamic and the remainder consider themselves to be 'Successful Collaborators'. The 6 sectors and the research periods are listed below:

- Defence (2001 – 2010)
- Outsourcing (2004 – 2012)
- IT (2009 – 2017)
- Food & Beverage (2005 -2017)
- Retail (2004 -2010)
- Construction (2004 – 2018)

General Findings

In broad terms we found that the majority of relationships had developed over time from a transactional state to a desire to work more closely. Regardless of the positive performance picture based upon survey data shown above, interviews with a wide range of senior managers clearly showed that many had reached a point where the original enthusiasm had not been sustained. They had become complaisant and were only achieving average results at best. A number were inefficient and dysfunctional to some degree and in a few cases, in danger of breaking apart.

Most managers were familiar with the term collaboration and its potential benefits. But they were reluctant to open discussions with would-be partners and in any case were unsure of what they needed to do practically to collaborate. They also saw this strategy as an overhead and an added complication rather than a way out of the mess they were in. This limited perspective was reinforced by the fact that the partners only came together to solve problems.

> *"Because all our dealings with the customer seem to concentrate on problems the relationship is poor and we never get to consider the wider picture."*

A small number of relationships across the sectors were extremely successful and reaping substantial financial and reputational returns. The reason for this was they took a holistic view with their partner.

> *"We get offered new product lines that other more aggressive retailers would not get in a million years."*

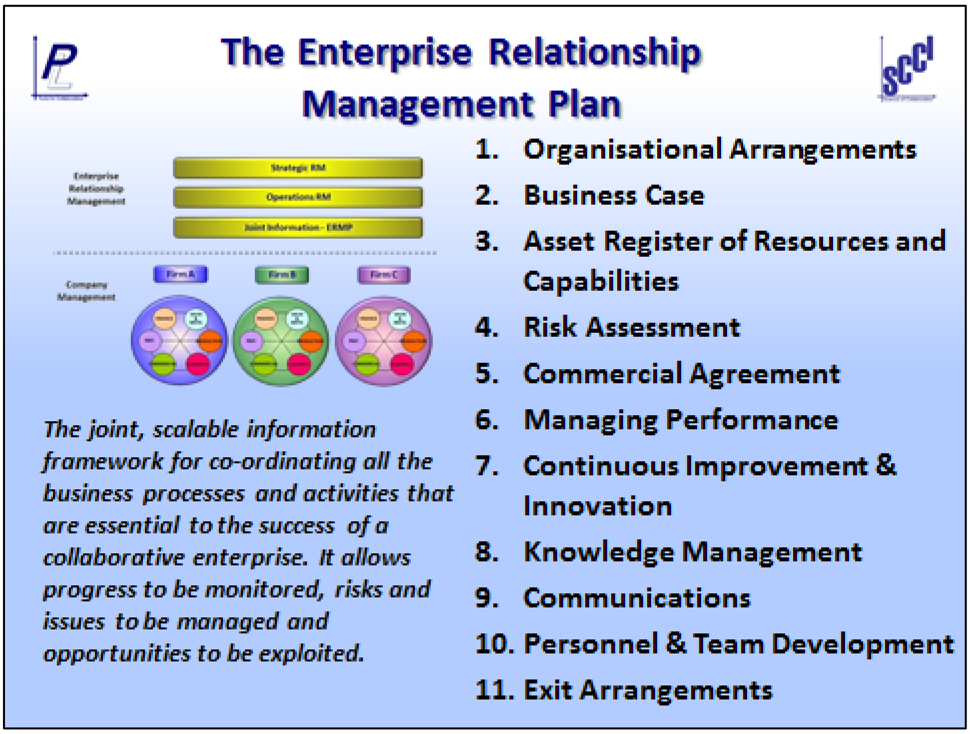
In the light of this evidence, we propose that investing in systematic relationship management would have allowed these organisations to make sense of their situation, ease the management task and open the door to joint innovation and the achievement of superior rewards.

Collaborative Relationship Characteristics

The following topics represent common features of the 123 collaborative relationships within 6 industry sectors that we examined over a period of 20 years.

- **Enterprise Relationship Management Planning**

As a general observation a viable enterprise relationship management plan (target operating model) encompassing all parties including operational personnel and stakeholders and, covering such aspects as governance, organisation structure, communications, business and administration processes and continuity was lacking from the outset. Senior managers did not seem to understand that it was necessary. This created adverse repercussions which ricocheted throughout the life of most partnerships. Continuity and the opportunity to reap the increased value from collaboration was often lost or diminished and never regained. This particularly affected organisations that migrated over time from transactional relationships to closer working. For example, the Cereals industry suddenly became aware that transport was actually a valuable resource rather than a commodity. It also impacted organisations that went through a distinct Decision Phase on their way to an Operating Phase; for instance, Defence and Outsourcing both had tendering processes.



"It's difficult to have confidence in our organisation where there is so much overlapping of responsibilities and duplication of effort. To add to the chaos each company is on a separate floor. You have to speak to 10 people to get the answer to a problem."

"We have a reasonable idea of what our customer wants and the public. We are not at all sure about our suppliers. There are probably difficulties and mismatches. We need to join up the whole supply chain."

"Lack of identifiable central control and formal procedures results in: blurring of responsibilities, uncoordinated actions, less effective embedding of lessons learned, failure to spread best practice, dependence on a few key individuals and confusing lines of communication."

"Our joint review of the business was a failure. Instead of adopting a positive attitude to building joint working it turned into a 'blame game'. Now we are suspicious of each other, co-operation has been lost and some people even feel threatened."

- **Learning to work together**

Collaboration is where firms enter into buyer-seller relationships, supply chain partnerships, services marketing arrangements or any other relationship combination. They will work together using their specialised resources innovatively to achieve aims and objectives that could not be realised on their own. A natural consequence is a lack of autonomy which is expected to be compensated through expected gains. We observed a variety of reactions to the varying degrees of interdependence achieved. These were characterised by efforts to come to terms with working closely together.

"Fair does not mean weak but, an understanding of the other side."

"We have agreed a three-year supply contract to provide them with ordering security. It has allowed us both to invest confidently."

"Enabling arrangements with the customer reduces admin costs by not requiring us to compete."

"We use the same weekly measurements that we use in our own production lines. They are not too pleased with this because their ordering and production systems are completely different."

In several relationships the partners had become 'locked in' either because there was no alternative or change was impractical. Partners either felt 'imprisoned' because of a loss of control or, had achieved a 'happy marriage' where joint management enabled innovation, continuous improvement and superior returns.

"There are very few other suppliers who can do what they can do. So we have to reach an agreement because they produce commercial winners. Their designs give them the edge."

"They tested the market to see if they could replace us but no one else came close."

"We rely on them more than they rely on us. They do too much for us - if they burned down tomorrow, we could not produce the product."

"We will never achieve a true business footing because there is no open market competition for this product and we are shackled to this supplier - and he knows it!"

"There's no point in exploiting our monopoly position because it prejudices our long-term business."

"We do not contemplate changing our supplier. Of course, we could but it would be difficult and expensive. "

"If we hadn't been tied to the company by IPR we would have gone elsewhere."

"We are particularly concerned about competition from their repair organisation; it has a protected order book."

A number of relationships involved a large, dominant partner and a smaller, specialist supplier. Interdependence reduced the power imbalance and often resulted in misgivings by the customer and a realisation by the supplier that he was no longer the 'junior' partner. It also required the customer to make allowances for the supplier's minimalist administrative resources.

"They expect us to perform like one of their factories but we cannot as we run jobs for different clients - one job must be completed before another can start."

"The customer's people are intelligent and hard-working but they lack seniority and have a rigid system of working that stifles Innovation."

"The independents were closer to the front line and the profits because it's their own money. When you actually get into some of the bigger boys, they're so removed from it that the politics gets in the way of common sense and profit."

"In the past year due to the workload of the co-manufacturer, the working relationship was less close than previously. They are not very good at answering emails or faxes. The best thing to do is use the phone although that is not always answered."

- **Teams in Action**

In many of the relationships, managers were spending significant effort fire-fighting problems because objective, joint problem prevention/solving mechanisms were inadequate.

"Unfortunately, the coherence of the programme lost its way over time. It lost touch with reality and became a monthly firefighting exercise."

"Our partner wants a collaborative relationship involving continuous improvement, innovation, joint problem solving and solution generation but they have not defined what any of these mean."

"They have provided a member of staff to work in our team at their expense. He acts as a gateway for information from his company and helps prevent misunderstandings. This shows their commitment to the development of the new partnering arrangement."

In some cases, 'regular reviews' no longer took place because they had become acrimonious. For example, we found a common issue where one partner discovered an operational problem which they attempted to solve without telling the other. Meanwhile the other was separately attempting to mitigate the business impact. In a number of these cases the problem was far more serious than either anticipated and led to an escalation in tension between the partners.

"We never sit down with them to have an open planning discussion about the wider issues of stockholding, demand and sales plans as I do with our other customers. We only talk about policies when there are problems."

Another example of a common practice was where a partner, in trying to be helpful, made a unilateral change without considering the implications. In one case he changed the packaging to better protect the product but the increased size couldn't fit on the pallets and caused shipping problems.

"Work is being done within our partner's organisation but they are not currently discussing it with us. It would be easier to help answer the question if we understood why, it was being asked."

The general effect was co-operation suffered and there was an adverse impact on performance and trust.

"If we have problems, we do not hide them because it can have a negative impact on the relationship. Honesty is the best policy."

Where regular operational meetings took place that reviewed matters such as joint performance targets, resource utilisation, risks, intellectual property and pre-emptive issue management, it created an environment that focused on building trust and commitment for the long-term, innovation and continuous improvement. Moreover, it prevented problems occurring in the first place.

"Frequent contacts, even as often as daily, build confidence, reduce risks of misunderstandings and keep the team focussed. Sometimes they would hop a plane and be here. 'You have a problem: how can we work it out?"

In some sectors the 'one team approach' to joint working provided a means of reducing cultural differences, harmonising objectives and promoting interdependence.

"By having a member of staff in their team we are able to communicate much better, reduce misunderstandings, and gain a much clearer idea of the plans for the business."

"It was predicted that it would take 18 months to get Freedom Foods standard up and running we did it together in 3. It was a tremendous achievement."

"The balance between formality and informality is about right. We know where the line in the sand is. We can be blunt and open but it is positive and constructive. We have a no blame culture!"

- **Governance**

The importance of applying a flexible system of governance appropriate to collaborative working was not always recognised. The development of effective relationships was undermined by the use of standard contracts with added Terms and Conditions 'designed' to cater for collaborative working. Furthermore, commercial staff who refused to adapt and continued to micro-manage contracts against inappropriate performance targets did not help the situation. This phenomenon was the most significant driver of relationship dissonance.

"Their commercial people are the main stumbling block to good, timely, efficient relationships. In recent negotiations many standard restrictions were included which would hold both sides back through lack of flexibility."

"The new contract invoked an automatic year-on-year percentage cost reduction by the supplier and any contribution from him of innovation and continuous improvement was not included."

"Their performance against the contract continues to decline. I intend to increasingly use the contract to manage the situation."

Conversely in a few notable instances where the commercial staff were integrated with the joint team and brought their expertise to the benefit of the relationship, it was the key success factor in the collaborative enterprise. Further, the use of SLAs and framework contracts proved to be more supportive of successful relationships.

"Now that we have a partnering arrangement around a good framework contract we just concentrate on the customer - we no longer refer to the small print."

"The client's Commercial Director has declared that his aim is to help us deliver our contract outputs. Unfortunately, this does not always permeate down into his organisation."

In some cases, senior managers' misguided efforts to free up innovation and create a 'can-do' attitude, loosened the reins on change control and financial governance at the operational level. The result was usually uncontrolled design changes, poor control of third-party suppliers and ex-contract working with the associated cost and time overruns. In others the lack of a formal operating structure allowed stakeholders to by-pass the proper management channels with similar results. Inevitably this led to acrimony.

"Towards the back end of the project when the requirement for design changes became more urgent, sometimes we had to bypass the document control system to expedite action."

"They would start building from any drawings that were available so we blinkered them to stop accidents from happening."

"In order to get away from the blame culture, commercial pressures were reduced. This meant that cost overruns came to light too late in the project."

- **Communications**

A critical success factor was the quality of communication that was used to 'sew together' all aspects of the joint enterprise.

“We have regular, frequent, informal face-to-face meetings and phone conversations where both sides are comfortable exposing their agendas, concerns and risk.”

Imperfect communications due to poorly defined joint processes was a thread running through many of the relationships we reviewed.

> *“We are missing a formal cascade to all contractors and organisations of the customer's business context; we have to rely on 'corridor' conversations.”*

A lack of a consistent, communicated collaboration policy to all levels resulted in a number of issues that increased costs and caused delays.

> *“The strategy is shared at the high level but it does not filter down to the ops teams who need to understand the business issues in order to be effective.”*

In a number of relationships uncontrolled free–flow of communication was encouraged but occasionally this led to informal decisions that incurred additional costs.

> *“There is an e-mail culture within the project where anyone can talk to anyone. This brings the problem of validity and the need to balance confusion with flexibility.”*

In others stakeholders such as partner HQ departments, end customers, third party suppliers and external ‘authorities’ interfered by communicating directly with operations personnel without the knowledge of the joint relationship management. Furthermore, there was no system to provide a consistent ‘message’ to all relationship parties.

> *“Due to the way the design disciplines are organised, it is important that they feed back to the project manager regularly and consistently. The disciplines are not as open as they could be and tend to exist in their own silo.”*
>
> *“End customers don't always know what's going on. It would be useful if we could all have a shared schedule of visits to each site.”*
>
> *“We seem to have too much interaction with numerous stakeholder agencies. There is no buffer between us and a plethora of voices, often giving conflicting messages.”*
>
> *“Our HQ safety department was instructing the supplier to make changes without reference to us. I don’t have the budget for it.”*

Moreover, misconceptions and negative historical events that were unresolved cast a long shadow and became ‘blots on the relationship landscape’.

> “*Loose words can cause upset in the relationship. A simple statement that it took 18 months of talking and 3 months of work did not go down well with the people who had been striving for 18 months.”*
>
> *“We still have our tense moments, as with my own team this is healthy; if too many things go un-sorted, they just fester.”*

The lack of joint face to face communications and problem-solving procedures reduced trust and efficiency. Where these were established, they enabled both sides to demonstrate fairness and increased empathy. Regular contacts gave them jointly understood performance measures and overcame geography and cultural differences.

"It has been successful having a senior secondee on their management board. It has reduced suspicion and increased trust. We also have a representative on their Project Review Board and who has been asked to attend their risk meeting. "

"Every month a project meeting is held where red flag issues on health and safety, costs and quality are raised. These are minuted with actions and dates specified."

Unless communications took place often and between appropriate departments and people, operational frictions often resulted. It took a lot of effort to obtain routine information such as forecasting and progress data consequently issues were not resolved as quickly as they should be and time and resources were wasted.

"We don't have routine meetings with the Customer; they have been to see me once in the last year."

"'There seems to be a gap in communications between the Customer and the end Customer. We could solve modification problems much more quickly if they also were present at review meetings."

"They employ a scatter-gun approach. They table the same question at different meetings until they hear the answer that suits them."

"We could not agree a shared web-based system to handle data. The resultant information system was cumbersome, caused delays, things got lost, was incomplete, lacked tracking and lacked feedback."

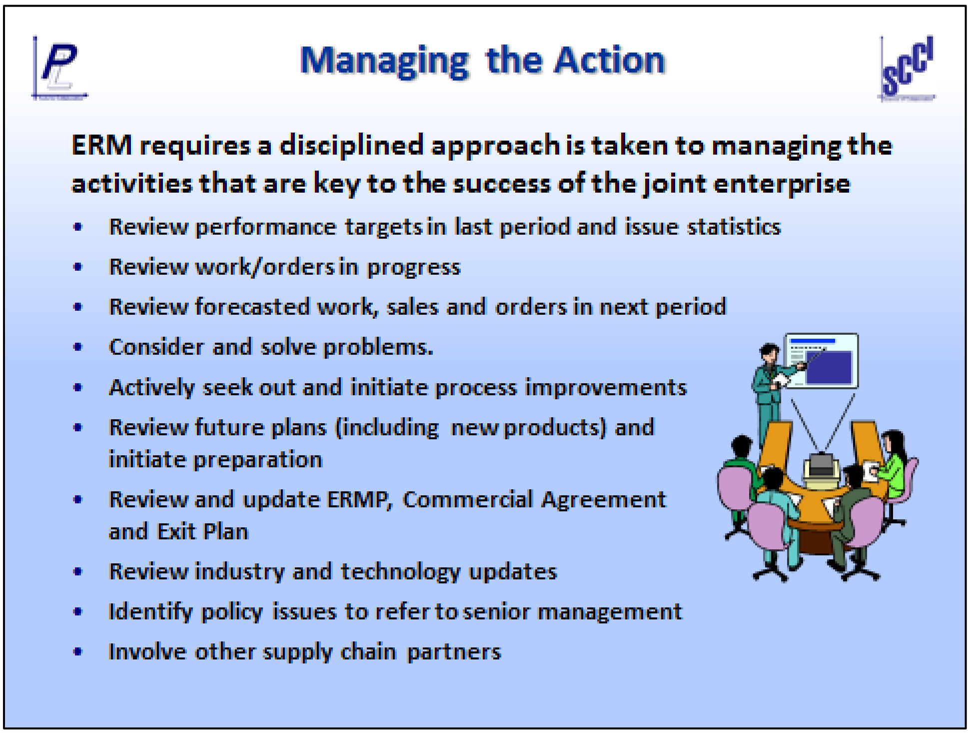
"Due to the way the design disciplines are organised, they don't feed back to the project manager regularly and consistently. They tend to exist in their own silo."

So often collaboration was launched with a fanfare of trumpets and good intentions but over time these were lost and organisations reverted to business as usual. This was because managers turned their attention elsewhere.

"The intent of the leaders is NOT always promoted by the team beneath and this inconsistency can be damaging. We need to keep promoting and communicating the strengths of the partnership and what it delivers."

"Maybe we have all got complacent and ambition has waned."

"When we first got together with the Customer to establish our relationship, we put it all up on the wall. Eighteen months later nothing has changed."



- **Value Capture**

In the majority of relationships, we saw little evidence of effective value capture monitoring and as a result, organisations often struggled to cost-justify relationship management. In a major Defence sector relationship, there was a sophisticated 'gain share' system which became a source of acrimony because instead of incentivising relationship-building and desired outcomes, managers wrangled over minutiae. Across all sectors there were highly valued relationships that were only reluctantly recognised, usually by the customer, and as a result the full potential was not realised.

> *"The Customer has no intention of sharing any cost savings they make with us. For instance, they have told us that if the partnering arrangement makes a staff member redundant, he will be redeployed in the office and no savings will be made or shared."*
>
> *"'We had to go out on a contractual limb, all the risk was ours because the Customer would not commit."*
>
> *"Although I believe our success should be closely linked to that of our customer, his willingness to competitively tender every requirement to the absolute lowest bidder and the lack of information to allow us to plan our future R&D does not help."*
>
> *"Their commercial staffs' view of sharing is they have the lion's share and we get what's left over."*

However, in a few relationships the realised benefits which increased over time were a significant factor in their longevity. Each operated a benefit tracking and sharing system which was a central part of an incentivising package. It was carefully crafted, implemented and managed to ensure that it remained a positive influence on performance. It was usually kept as simple as possible. Value recognition was not just viewed as cost reduction but included other objectives such as increased profits, market share, growth, innovation, sustainability, customer service and reputation. It helped to sustain the relationship, especially with decision-makers.

“The new partnering arrangement will run over 10 years and allow gainshare. At last, we can start to improve the quality of this relationship for both sides.”

“We invest in a substantial value of inventory for our partner which demonstrates our commitment. As a result, we save them £50k pa because they don't have to employ a parts manager.”

“We recognise the benefits of our long-term programme; we are motivated and incentivised by the profit-sharing scheme.”

“We are motivated by profit sharing and as a result large savings have been made.”

- **Performance Management**

Generally, there were few relationships where joint targets had been defined or used to incentivise performance. This was because the objectives of the individual partners and those of the joint enterprises were not clearly defined or reconciled. Whilst the need for measurements was understood, often they were inappropriate and unusable as a means managing relationship performance. This caused frustration amongst middle managers, commercial staff to refer to Terms and Conditions and at Board level talk of ‘pulling the plug’. Performance measures were often unpredictable or even inappropriate. Often the only measure was revenue which, most agreed, was a trailing indicator.

“There is a gulf in perception between the sides over performance which also extends to the end-customer. We are not sure what costs are so it will be difficult to measure the savings for a partnering agreement. Without a common understanding of how we are doing we cannot move forward.”

“Performance monitoring was sporadic at the working level because staff did not buy into it.”

“As long as you get your money; that's the KPIs met. Isn't it?”

However, in a few instances managers worked jointly with their counterparts to consider their goals and objectives and develop effective performance systems.

“All stakeholders were involved in the project including the end customers who helped design the performance targets. The same people are involved in implementation.”

In others, openness about performance was a sign of growing confidence in the relationship.

"We're making progress with the company. At our last monthly meeting I was surprised to see they were portraying their performance figures honestly and without massaging."

- **Relationship Performance Assessment**

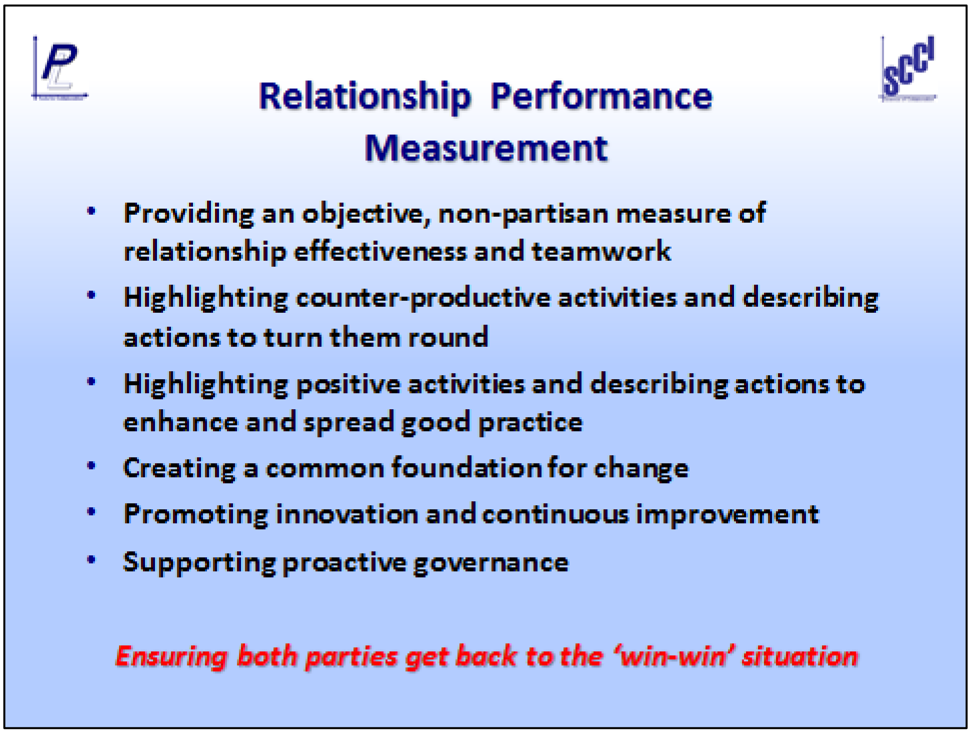
Traditional business KPIs do not provide adequate information for managing a joint enterprise. A formal collaborative management process that generates a comprehensive picture of the drivers of success and failure is required. This enables joint goal setting, progress monitoring, proactive problem solving and continuous improvement. Our assessments gave many their first opportunity to consider their relationship objectively with their partner and their stakeholders. In many instances managers confirmed that the report was a 'wake-up call' and stimulated significant business changes.

"The fact that the company has pointed out in the report a number of reservations has come as a complete surprise to us. We are going to discuss the matter with them in a special meeting."

"The report has been very useful; it has provoked a response. We intend to use it as a springboard to improve team working with the customer."

"It is important that the results of your study are promulgated to the senior levels in the company so that they will allocate more resources to improve the service."

"I hope the consultants will be able to implement some of the changes implied by your report. We don't have the time and resources; we are too busy fighting fires."



- **Adapting to Changes in the External Environment**

We found many examples where alliances were struggling to adapt their relationships to geo-political imperatives, market forces and changes in legislation. For instance, UK Defence was profoundly impacted by the ending of the Cold War. Outsourcing partners were driven by the need to widen their service offerings against an increasing desire by customers for cost reductions. In response to these external pressures some initiated headlong collaborative initiatives without really understanding what they were doing or how it should work. Where large organisations partnered with smaller suppliers in order to gain access to their more dynamic, innovative capabilities this introduced hard-to-manage stresses.

> *"Our client thinks we are a 'cash cow' and wants a part of it. They now realise we cut our 'fat' before the consortium was formed and are frustrated that the 'rich pickings' are not there for the taking. Moreover, any benefits are going to the shareholders."*

Where collaborative capabilities had been developed this enabled them to weather the storms successfully.

> *"The longer you work together the more they understand. They begin to understand your standards and expectations which stop problems developing."*

> *"The 'control tower' concept where complete information is available about transport movements in an area opens the door to further co-opetitive relationships."*

> *"Day-to-day interaction between our teams makes things work. We are stimulating greater interaction to grasp opportunities."*

- **Adapting to Change Internally**

Across the sectors we have found evidence that change was being forced upon organisations. Traditional ways of doing business couldn't cope and the need to change the way they operated became an imperative.

> *"We used to be a traditional business providing a standard offering to our customers but in the face of greater competition we are changing and becoming more innovative."*

> *"Our business is growing rapidly and we are opening new outlets weekly. Our logistics service is not keeping up!"*

Many Boards recognised the advantages of collaborative working but relied on their senior managers to convert their strategic intent into an implementable plan of action. They were expected to proactively manage the process of embedding and continuously improving collaborative working throughout the life of the relationship. However, understanding how to do it and manage it was missing.

> *"The customer's board and many staff do not understand fully the strategic and economic importance of the business or the challenges of modern contracts."*

So often middle managers were expected to make radical changes without a clear plan or additional resources and as a result felt their positions were threatened. At the operational level there was confusion with some staff actively resisting change and others misinterpreting the requirement and working at cross-purposes. Generally, people started out very enthusiastic at the prospect of working more closely with others but over time felt let down when it didn't materialise.

> *"There are lots of dinosaurs still in the weeds of both companies which is why behaviours do not yet match aspirations - many see this as 'just another Management Initiative' rather than a life changing event."*

- **Personal Relationships**

Positive personal relationships at the professional level, for instance between engineers, were an enduring feature that brought about a feeling of solidarity and, a willingness to share risks and solve problems together. Often these were 'islands' of teamwork within an otherwise confusing picture.

> *"Nobody steps up and takes the lead in ensuring that the partnership works. In the absence of that, the partners work together when they have to, but there is not a mutual trust environment in place".*

> *"The personal relationships between the programme office and us are very good and this is helped by having our secondees addressing issues as they occur."*

Relationship managers generally formed strong bonds with their opposite numbers and often supported each other against the pressures from their parent hierarchies and the complexities in their environment. In one sector a company operating retail fashion supply chains had a model for personal interactions that was a watch-word for all participants, customer and suppliers. This ensured that personnel who exhibited behavioural patterns supporting collaboration were employed and thrived.

> *"The people they choose are moulded into their culture of working with their suppliers. Those who don't work like that don't fit in and go."*

In a number of relationships, it was policy to maintain the staffing stability and where this happened there were positive outcomes in terms of development of personal relationships and trust and, knowledge and experience contributed to successful collaboration. On the other hand, high turnover of staff often led to confusion and frustration on all sides.

> *"The almost complete change of the customer's team resulted in a reversion to old behaviours, evidence of a lack of commitment to the partnering principles and a feeling that the level of trust, particularly among the commercial people has been reduced."*

- **Game Playing**

The traditional attitude of 'customers versus suppliers' was still alive and well with business game-playing remaining a part of the relationship culture. Customers either thought they were dominant or pretended to be 'ripped off'. They were concerned that suppliers might try to take advantage and therefore needed to be kept ‘on their toes’. Suppliers pretended to ‘play the expected game’ but in reality, they got on with business pragmatically. Both generally reaped the benefits of collaboration.

“When cancelling a product, you cannot say you have just gone off it. The easy option is to make up a reason. This is all part of the game.”

However, many commercial people saw themselves as the ‘referees’ and their insistence on contract ‘rules’ that were inappropriate to collaborative working cost the partners both time and money. There were also instances of real animosity and suspicion over customer power-plays within relationships that were transitioning from traditional price-based dealings to collaborative working. Suppliers resented the fact that their capabilities were not recognised.

“They continually use the word 'supplier' when talking about us. It is not seen as a Partnership by them and as such it is not the Partnership of equals. Ironically, they are losing out more by this approach to old fashioned 'supplier-bashing’.”

“They do not take a long-term view of the relationship. Instead, we appear to be trying to catch each other out and score points. They are still trying to punish us.”

Conclusion

Rather than summarising the points we have made earlier in this report, we have reproduced the findings from one of our 6 sector reviews below because it gives a good flavour of the overall state of collaborative relationships in our research. Although this sector appears to be mature, growing and increasingly complex, our investigations show that a number of fundamental management issues in both Public and Private organisations still abound. This is borne out by a number of recent high-profile failures. There is the potential to provide high quality, collaborative services however clients treat the industry as a way of driving costs down. This has made it into a low margin business which consequently makes it unattractive to high quality managerial talent.

- Organisations do not realise the importance of formal relationship management to the success of operational arrangements
- Organisations fail to understand that to access the additional benefits of collaboration they need to invest in its management
- Relationship management is often confused with commercial management and thus the opportunities of collaboration are bypassed
- Standard commercial arrangements generally are not modified to suit partnering and therefore the wrong incentives, inflexible governance and inappropriate performance targets are applied
- Clients have unrealistic expectations of the implementation and benefits delivery timescales
- Clients do not understand what they want from their partner
- Clients and suppliers fail to understand their roles as equal partners
- Suppliers over-promise what they can deliver
- Lack of development of a joint operating model within the Decision Phase limits the ability to deliver a successful operation
- Failure to manage cultural change, including staff resentment, can have a serious, detrimental impact on performance
- Failure to understand that collaboration doesn't occur instantaneously and needs to be managed through a graduated implementation programme
- Key supply chain partners must be part of the collaborative operation
- Often little thought is devoted to putting in-place effective communication and problem-solving arrangements between the partners
- Clients demand greater innovation but fail to put in place the structures needed to foster and support it
- Management usually fail to consider the practical implications of collaborative working on business processes and staff
- Where both parties learn from experience and maintain their determination to build a successful relationship then collaborating pays dividends

"They don't think that we are important. Nobody ever asks us what we can do to help."

Reference:

Andrew Humphries & Linda McComie (2022), **Implementing and Managing Collaborative Relationships – A Practical Guide for Managers**
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