Strategic Partnership Checklist

✓ Brainstorm and Identify Potential Partners
  o Membership Organizations (Associations, Federations, etc.)
    ▪ Human Resources
    ▪ Learning and Development
    ▪ Chamber of Commerce
  o Businesses
    ▪ Offer coaching or expertise to their employees
    ▪ Offer coaching or expertise to their customers/consumers
  o NGOs and Nonprofits
  o Tools and Solutions
    ▪ Insurance
    ▪ Assessments
    ▪ Applications
    ▪ Business tools

✓ Prepare to Approach and Meet with Potential Partner
  o Identify the current condition of the chapter
  o Get into the correct mindset. (How can we help?)
  o Create a list of benefits the chapter can provide to help this organization

✓ Discuss and Collaborate with Partner
  o Ask the partner what benefits they would like to see from the chapter
  o Set mutual goals
  o Set individual expectations
  o Discuss and agree upon timelines
  o Set up partnership agreement
    ▪ ICF Code of Ethics
    ▪ ICF definition of coaching
    ▪ Transparency around who is involved and why (coaches involved, partnering organizations, etc.)
    ▪ Boundaries for key players involved in the partnership
    ▪ Compliance standards (holding each party involved accountable)

✓ Maintain the Partnership
  o Check in with each other
    ▪ What is working
    ▪ What may need to change
  o Discuss other opportunities that may arise
  o Review the return on expectations and investment
  o Review the progress toward mutual goals

✓ Conclude the Partnership
  o Gratitude
  o Review key learnings and outcomes