

RMM “How to” Guidance Note Hints and Tips for a Successful RMM Exercise

1 Introduction

This document is intended to supplement the “RMM Facilitators Guide” which describes how to use the RMM and “mechanics” of setting up and using the RMM.

This document is intended to provide higher level guidance, hints and tips for a successful RMM exercise, based on experience gained by the community of RMM Facilitators and Practitioners.

The document covers:

1. Setting up
2. RMM Diagnostics
3. RMM Workshops

2 Setting up the RMM process

2.1 Objectives

All parties involved must be clear on why a RMM exercise is being run and all parties must be bought into the process. RMM activities that are too heavily driven by one side run the risk of failure.

Issues/questions to consider include:

- Are we all clear on why we are doing this? Typical benefits might include:
 - Improved Relationships
 - Aligned Teams
 - Improved Business
 - Reduced Time scales
 - Resources Aligned to Business Objectives
 - Organisational Development
 - Cost Savings
 - Visibility of Innovation in the Value Chain
 - Deep Understanding, and Audit and Audit Trail of the Relationship
 - Reduced Waste

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- What do we/they/all of us want to get out of the process?
 - Are we ready to change? The RMM exercise will probably drive out actions for change. Are we capable of carrying these through?
 - Are we committed and have the time/resource available? Do we have the facilitation skills/independent facilitator available?
 - Are we prepared to make this a way of life rather than just a one-off?
 - Are we ready for the potentially wider change implications that using a relationship perspective might generate e.g. technical, process, commercial, organisation etc.
 - Are we bought in to driving towards a more open, collaborative, trusting way of working?

Beware of RMM just being used as another way of customers trying to drive supplier performance, expecting suppliers to change/improve without acknowledging the need to change themselves.

2.2 Setting up

The RMM Facilitator will need to set-up the RMM process as follows:

- Set up scoping meeting and agree inputs, deliverables, expected measures & milestones;
- Set the plan for diagnostics, RMM Workshop, follow-up etc.
- Executive Briefing – Brief the sponsors/seniors. Use a standard briefing presentation pack;
- Prepare to answer frequently asked questions;
- Agree a budget and timescales and line up funding;
- Agree & get buy-in from key stakeholders to deploy the process;

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2.3 Sponsors

Relationship Sponsors play a key role on both sides. Each party should identify a senior sponsor who will drive the activity for their respective organisation.

A senior sponsor should have the following Ideal characteristics:

- Key player in the relationship/contract;
- Senior, able to secure process participation by influential stakeholders;
- Able to promote and generate high urgency amongst participants;
- Has very high level of vested interest in the relationship/project/contract being successful but can maintain a degree of objectivity and even handedness – not becoming too focussed on own organisation’s objectives;
- Has excellent interpersonal skills and able to arbitrate and lead discussion during relationship workshops;
- Empowered to commit decisions on behalf of all stakeholder groups;
- Lead involvement in relationship expected to continue into the medium to long term.

2.4 Facilitators

The RMM process can be carried out by anyone trained in the use of the RMM, but care must be taken to ensure that facilitators have an appropriate degree of independence and facilitation skills and in some cases seniority.

Running an RMM doesn’t necessarily require 3rd party independent facilitators, so long as both parties agree to the use of an internal independent.

In either case, the facilitator must remain impartial.

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3 RMM Diagnostics and Analysis

3.1 Questionnaires

Questionnaires should be sent out within a month of the scheduled RMM workshop. Respondents should be sent a briefing cover note with the RMM questionnaire which:

- Encourages them to respond in the appropriate timescale (usually 1-2 weeks);
- Not over-analyse. The RMM is a perception survey, not a scientific measure;
- Be honest;
- Add free-form comments to justify/illustrate their scores (very important);
- Give a n/a response if they really don't know.

It is likely that the facilitator will need to chase up slow/non-responders.

3.2 Diagnostics

The facilitator needs to collate the responses and add all responses to the analysis workbook.

Hints and Tips for the analysis of the responses:

- Start with the gap analysis to look at overall trends, level of agreement/disagreement, highlights and lowlights;
- Look at the 0 and 1 analysis to see who thinks it's poor and where;
- Pull out the comments to allow a question by question analysis;
- Go through question by question, customer and supplier looking at scores and comments;
- Write your own summary of each question and section;
 - Be careful to summarise what is said not what you think is being said or what you think personally at this stage.
 - It's OK to paraphrase but use their words where possible, don't add your own words which changes the sentiment;

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- Highlight key issues as you go along;
- Note where scores from individuals are consistently low/high/out of step or comments unclear. These respondents may need a follow-up.
- Select key phrases or comments which can be used as direct quotes to illustrate the general points being made. Any direct quotes should not be attributed.
- Go through 0 and 1 analysis to check that key issues have been highlighted
- Go through person by person to see if there are any “outliers”. Any specifically negative individuals may need a follow-up one to one interview to ensure that their concerns are fully understood.
- Finally create your own summary of the situation – the facilitator’s perceptions. It is sometimes useful to help in gathering your thoughts to answer the question – “what are the 5 key issues or challenges in this relationship?” This facilitator’s analysis can be included in a summary report. The more independent and objective the facilitator, the easier it is, and the more accepted it will be, to add in your views.
- Any clarifications or further in depth understanding of the issues raised should be gained through follow-up one to one interviews of selected delegates.
- The summary of perceptions should be discussed with the senior sponsors prior to the workshop.

3.3 Feedback to Delegates

Your summary of perceptions creates the audit trail for relationship issues. This summary of the perceptions of the relationship (generated during the diagnostics) should be fed back to the workshop delegates:

- In the form of a short report (your summary of the feedback) prior to the workshop; and/or
- At the workshop as a short PowerPoint summary of key issues raised (bullet points)

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A summary report should only be issued with the prior consent of the sponsors. Where there are many issues raised and detailed comments, it may be an advantage to give delegates sight of these prior to the workshop to save time.

Any summary report issued prior to a workshop should be clear and unambiguous – a report which requires clarification or begs questions will not help.

4 RMM Workshops

4.1 Issues and Pitfalls

When setting up or arranging a RMM workshop, be aware of the following typical issues:

- Driven too much by one side – one side wants it more than the other;
- Reluctant sponsors – they might not be bought in;
- Lack of full stakeholder participation and buy-in – they don’t see the need/benefits, don’t believe in the process, “they just need to perform, then we’ll have a better relationship”...
- Personnel changes – people moving in or moving out;
- Symptoms of a lack of buy-in are often manifested in difficulty in logistics, for example:
 - “Diaries are very difficult, can we slip things a bit...”
 - “Joe’s going to be tied up on something important and can’t make it.”
 - “There are some pretty knotty issues at the moment – is this the right time for this relationship stuff?...”

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4.2 Typical RMM Workshop Agendas

RMM workshops are typically run over one or 2 days. Issues associated with choosing a one or 2 day session include:

- **A one-day session**
 - Easier to arrange logistics given availability of people;
 - Useful as follow-up reviews once everyone has become familiar with the process;
 - Limited time for in-depth discussions so need good facilitation to keep on track, focus on priorities and get an output;
 - Preparing delegates ahead of time on the process and key issues can make time together more efficient;
- **2-Day sessions**
 - More time for in-depth discussions;
 - More difficult logistics – diary management, availability of people etc.
 - Opportunity for socialising during evening;
 - Time available to do relationship management planning (develop the basis of an RMP to embed the approach)

1 day Workshop

- Introduction & Objectives
- Overview of the process
- Feedback of RMM Questionnaires
 - Perceptions from each Party
 - Discussion – Is this a fair reflection? Are there any surprises?
- Agreement of “To be” state
- Agreement of key issues to address
 - Syndicate activity
- Prioritisation of key issues – use Impact vs Difficulty to help if needed
- Action Planning

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- Agreement of Next Steps

2 days – to allow for more in depth discussion and planning of a relationship management approach

- Introduction & Objectives
- Overview of the process
- Feedback of RMM Questionnaires
 - Perceptions from each Party
 - Discussion – Is this a fair reflection? Are there any surprises?
- Agreement of “To be” state
- Agreement of key issues arising to address
 - Syndicate activity
- Prioritisation of key issues to be addressed – use Impact vs Difficulty to help if needed
- Action Planning
- Development of Relationship Management Plan (RMP)
 - Charter & Principles
 - Governance
 - Behavioural Code
 - Other Critical Success Factors (CSFs) for the relationship
- Agreement of Next Steps
 - Date for follow-up
 - Action Plan management

RMM workshops must agree actions – what, who, when, and there must be agreement on who will drive the overall action plan – usually the senior sponsors, but they may delegate.

A handful of high quality actions with a chance of being implemented are much better than many actions that will never be addressed.

A follow-up process/event must be planned.

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4.3 Facilitation Tips & Hints

Typical Situations

- Everyone being very nice
- Confrontations
- Dis-engagement
- Dominant seniors

What can work to overcome them?

- Stirring it up! Ask a few provocative questions to get the debate going;
- Getting the senior sponsors on board;
- Getting the issues out in the open
- Joint problem solving;
- Social events;
- Understanding each other – getting behind the perceptions;

Tips & Hints:

- Setting the brief for the syndicates . Write it down simply and clearly – check understanding and give examples of what’s expected.
- Never ask questions of someone who is naturally quiet, cynical or asleep.
 - Use scanning eye contact
 - Ask questions of a group
- Don’t demonstrate your dogma, prejudice; keep your views to yourself unless asked.
- A facilitator catalyses debate by:
 - Asking rhetorical questions
 - Creating expectations
 - Moving the discussion forward
 - Stopping whinging
 - Stopping intellectualisation

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- Be careful to paraphrase people’s views using their language not yours
- A facilitator should:
 - Motivate
 - Encourage
 - Challenge
 - Excite
 - Make interesting

You are not expected to know the answers. The answers come from the group and the encouraging atmosphere that you create.