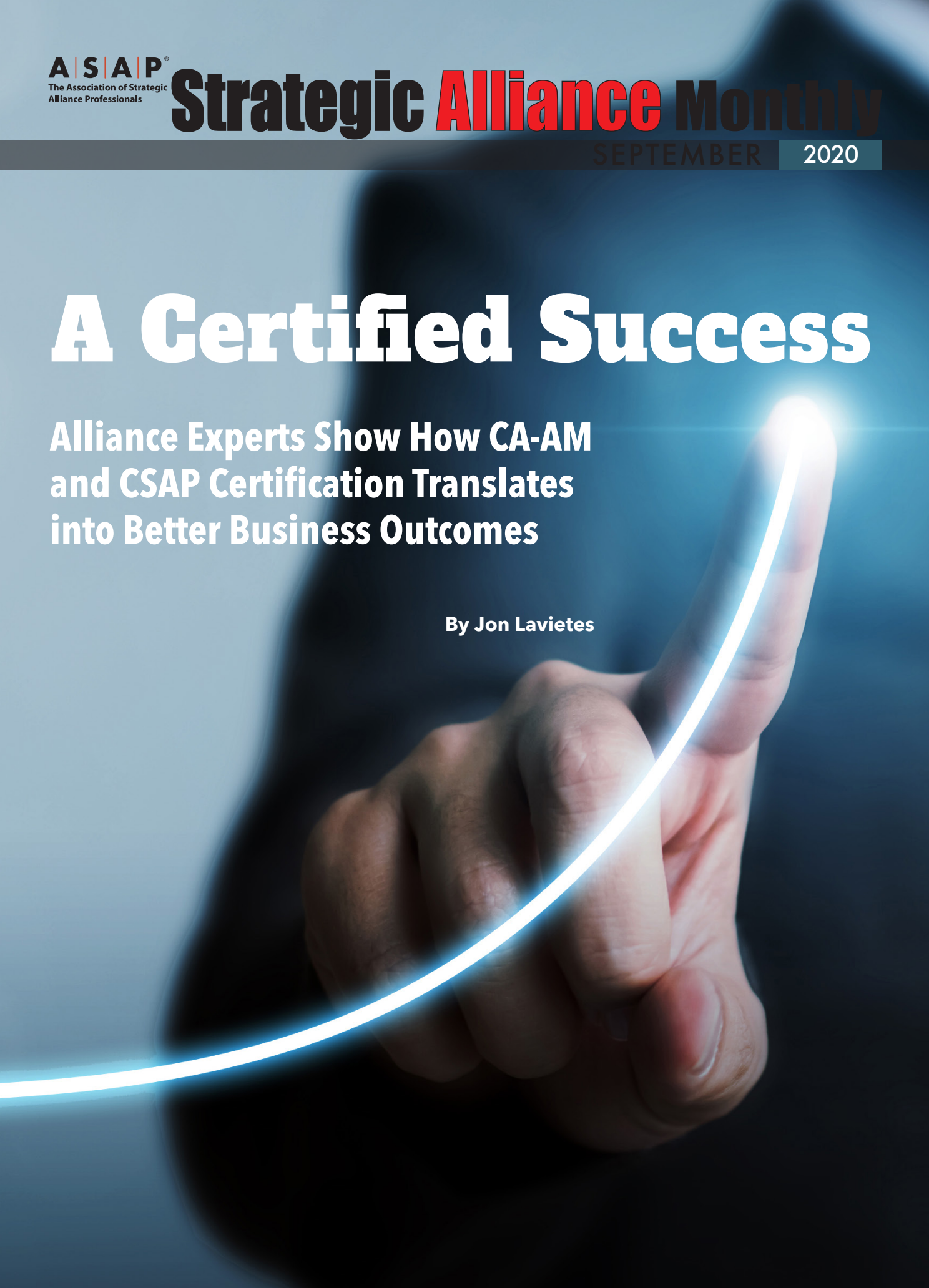


# A Certified Success

Alliance Experts Show How CA-AM  
and CSAP Certification Translates  
into Better Business Outcomes

By Jon Lavietes



At the heart of any person's professional success is usually great training and continuous education. In the alliance management profession, that training and education includes ASAP certification, one of the hallmarks of the association's unique value proposition. A number of expert alliance practitioners I spoke with across industries noted the savings in time and effort that ASAP certification yields, the alliance insights and lessons learned, and the benefits reaped in terms of greater value creation and, overall, improved alliance success rates.



Drew Quinlan, CA-AM

That is certainly the case for **Drew Quinlan**, CA-AM, vice president of strategic alliances at RingCentral, who has served in alliance management capacities at established technology companies since 2013. That was the year Quinlan became a principal partner manager at Salesforce after a decade in IT sales. He has since held vice president titles at Conga and PTC, and he currently oversees software and systems integrator alliances at RingCentral.

In the latter two stops, Quinlan decided to outfit his alliance teams and cross-functional personnel who engaged deeply in PTC's and RingCentral's respective collaborations with a Certificate of Achievement—Alliance Management (CA-AM), the basic certification for an alliance professional. It didn't take long for CA-AM certification to become a revelation to Quinlan. Prior to his engagement with ASAP, Quinlan estimated that 10 to 15 percent of his partnerships were "ultimately somewhat successful." Now he pegs that number at somewhere between 75 and 85 percent, far better than the generally accepted average of 40 percent across all industries.

**Prior to getting his team certified, Quinlan estimated that 10 to 15 percent of his partnerships were "ultimately somewhat successful." Now he pegs that number at somewhere between 75 and 85 percent.**

## Getting 90 Percent of the Way There Without the "Useless Activity"

Similarly, **Philip Sailer**, CSAP, senior director of SimpliVity hyperconverged infrastructure, software-defined, and cloud at Hewlett Packard Enterprise (HPE), also saw his alliance success rate soar after obtaining the profession's advanced credential, the Certified Strategic Alliance Professional (CSAP). He said the process of getting certified led to the elimination of "useless activity."



Philip Sailer, CSAP

"In the beginning, I partnered with anybody or I partnered with whomever the executives told me to partner with," he recalled.

Certification has profoundly impacted bottom lines in other ways, as Quinlan noted.

"[It] trains [my team] without me having to invest any time at all. I can spend a year working in groups and one-on-ones incrementally trying to up-level people to understand that this is the full way that you really do alliances and do them well, or I can just have everybody get certified in the first six weeks and we're all 90 percent of the way there," said Quinlan. "I can take a \$140,000-a-year [person] and make [them] almost as effective as a \$300,000-a-year [person]."

**"I can have everybody get certified and we're 90 percent of the way there. I can take a \$140,000-a-year person and make them almost as effective as a \$300,000-a-year person."**

Sailer, too, estimated that certification "gets me more than 90 percent of the way there" in terms of training. If and when he manages a large team in the future he said he might "borderline require" certification.

"[Training] would be a lot simpler. I wouldn't have to go back and do all that work from scratch," he said.

## A Disciplined Approach to Alliance Gray Areas

Over the years, more than 1,000 people have earned a CA-AM and about 100 people have attained the CSAP. Why and how have these designations resulted in more successful alliance managers, alliances, and portfolios in a business world that has largely resigned itself to the idea that more than half of its partnering initiatives will fail?

First, there are the exams. It's not that the tests themselves instantly make newly certified professionals successful, it's that the process of studying for them and the nature of the questions "align the atoms in your brain in such a way that you have a better likelihood of following a disciplined approach," according to Sailer.

Both of the exams aim to get practitioners used to the innate "gray areas" that come with managing alliances. The CA-AM is a multiple-choice test where students must choose the best option from a set of choices that appear to have more than one right answer. It is designed to validate that people with at least three years of experience are schooled in the basic principles of the alliance management discipline. The CSAP, on the other hand, is a rigorous four-hour proctored exam. It is intended for senior alliance managers with experience executing several phases of the alliance life cycle and/or managing a whole portfolio of alliances.



Dave Luvison, CSAP

The CA-AM is "designed to demonstrate that you've done this with some level of awareness and you can actually show that you are aware of certain practices and how they should work," said **Dave Luvison**, CSAP, executive in residence at Loyola University, Maryland, and one of the original chief architects of the exams. The CSAP is designed to gauge whether you are "able to see the whole picture. What strategically do you need to think about

in alliances? What do you need to think about in terms of building competencies as opposed to just managing situations?"

Today, the CSAP exam process requires a "preworkshop" in which several candidates from a variety of industries and backgrounds gather for a day to engage in deep discussions about case studies that may show up on the exam.

**Katherine Kendrick**, CSAP, head of alliance management at Jazz Pharmaceuticals, discovered that this exercise had positive ramifications that went well beyond preparing for the test itself.

"You get perspective on your own knowledge base that you can't get among a team of research scientists or commercial experts in your company," she said. "You're getting feedback from peers that you don't often have a chance to get. As a result of that, you really get to know these peers." Kendrick added that she still consults with some of the CSAP pre-exam workshop attendees she met that day when she needs another opinion on a complex alliance situation, and she counts them in her network.

"Both the CA-AM and the CSAP aren't just about, 'What is an alliance?' It's not about definitions and facts. It's about situations—what you would do in various situations. It's really the practical application of the knowledge that makes it more valuable," said **Christine Carberry**, CSAP, a veteran pharmaceutical alliance consultant who has held senior alliance management roles at Keryx Pharmaceuticals, FORUM Pharmaceuticals, and Biogen Idec, among other stops in her career.

"You have to assess the situation with limited information. The complexity level of the CSAP certifications makes you pull in more factors and integrate them," added Kendrick.

## Having a Truckload of Specialized Tools Ensures You Can Get the Job Done Right

No discussion of the CA-AM and CSAP tests can exclude *The ASAP Handbook of Alliance Management*. The two are inextricably linked; the former are tests of the principles laid out in the latter. Quinlan likens getting certified to learning how to be a "master carpenter." The *Handbook* is the toolbox and certification helps you become a craftsman.

"You may have a whole truckload or even a building full of specialty tools, but you may only go for a small subset of



Katherine Kendrick, CSAP



Christine Carberry, CSAP

tools on a regular basis. However, you still have that whole set of options, understandings, and ideas available to you at a moment's notice. It's always different—at every company, with every partner, partnership, and program,” he said.

“And I don't have to create all of these guidelines, frameworks, and checklists from scratch. It's all there [in the *Handbook*],” he added. (Over the past year the original *Handbook* has been augmented by special supplements devoted to IT partnering and biopharma alliances as well.)

**“I don't have to create all of these guidelines, frameworks, and checklists from scratch. It's all there [in the *Handbook*].”**

Carberry emphasized that the *Handbook* content alone won't lead you to success since each tool and practice gets applied differently, depending on the context. Certification helps candidates understand how to customize the *Handbook* principles for each situation. She said that the CSAP exam “forces you to say, ‘What would be the best starting point? What would be the most commonly used approach?’ knowing that you may not use that approach in a particular situation because there are other unique factors about that situation.”

Sailer took part in a CSAP study group with two colleagues in which they read the *Handbook* from “cover to cover.” The executives would read each section on their own and group their experiences into three categories for discussion: 1) ideas they never thought of before, 2) content that reinforced what they knew already, and 3) situations they would have handled differently with this newfound knowledge.

“That's the way the exam is, too. You really want to relate it to actual [experiences],” said Sailer.

Luvison, who designed the official CA-AM and CSAP review courses, has observed similar revelations in the prep sessions he has led. He recalled one instance where his students spent the first day of the course examining the role of an alliance charter.

“A lot of them will walk away saying, ‘We never thought to do that,’ or, ‘We did it in an incomplete way,’ or, ‘We did it in a manner where we didn't get the right level of conversation to occur, and I kind of wish we had done that because if we had, I could see how a lot of the misunderstanding we have been dealing with would have gone more smoothly,” he said. “They have the judgment to know how to set that up, so that it's a

meaningful conversation and not simply, ‘We have to bang out this charter so we can get it out of the way.’”

**“A lot of them will walk away [from certification courses] saying, ‘We never thought to do that.’”**

## A Professional Support Group to Maintain Certification—and Your Alliance Success

Just as important, certification is more than just studying and passing the test. Like a lawyer or doctor, alliance professionals benefit from the process of maintaining certification by attending or presenting at ASAP global and chapter events, contributing content to the association's Member Resource Library, writing pieces for ASAP editorial publications, attending or delivering webinars, and taking or teaching approved courses, among other activities.

“It's fair to say that CA-AM is basically your introduction to the community, and maintaining the CA-AM becomes your opportunity to really grow within that context,” said Luvison. “Until you have a support group of like-minded professionals, you basically have to figure everything out yourself, and nobody is that perfect.”

Carberry said that maintaining certification is critical in navigating the aforementioned shades of gray alliance managers will encounter regularly because it keeps you engaged with a community of people who have encountered, and continue to deal with, similar situations. Most important, you can talk to these experts from other organizations and industries in a candid way.

“That's something you can't get out of a handbook or a test,” she said.



## Refreshing a Stale Alliance, Manufacturing Trust

Carberry has garnered powerful results from implementing the *Handbook's* tricks of the trade in real-life contexts that mirror her CSAP training. At Biogen Idec, she and her colleagues relaunched a faltering, critical strategic alliance by putting her spin on several basic *Handbook* tools and processes: restructuring the joint steering committee (JSC) and escalation processes, changing alliance managers to inject new blood, and using a charter and conflict resolution techniques. (For an in-depth recounting of this alliance, see Christine Carberry and Lynda McDermott, “Too Important to Fail: Getting a Troubled Alliance Back on Track,” *Strategic Alliance Magazine*, Q2 2012.)

More recently, Keryx’s 2019 ASAP Alliance Excellence Award-winning alliance with contract development and manufacturing organization (CDMO) Patheon (now Thermo Fisher Scientific) illustrated how to transform a vendor relationship into a true strategic collaboration. Instead of just negotiating individual transactions and invoicing for them later, each side became an extension of the other’s organization, always working with the greater end-patient benefit in mind. When the partners encountered a supply chain disruption, they were able to make important decisions on the fly and have confidence that they could work out fair contract terms later.

“If you don’t take this approach to how you work with your CDMOs, number one, you leave value on the table because you’re not discussing potential opportunities to work more effectively together to get cost out of the process or to reduce cycle times. Those discussions don’t happen because people are treating them as a vendor. It’s an arm’s-length relationship,” Carberry recounted. “To have this strategic relationship meant that we had to have a different kind of conversation—a different kind of trust. Both sides had to go above and beyond.

We had to make decisions in the moment and deal with whatever the financial consequences were afterwards.”

**“If you don’t take this approach, you leave value on the table because you’re not discussing potential opportunities to work more effectively together.”**

Carberry praised the *Handbook's* section on building trust as a resource for constructing this type of alliance, but she also spoke at length about the utility of the frameworks around value creation that appear in both the *Handbook* and its industry-specific supplement *The ASAP Guide to Biopharmaceutical Partnering*, and how they helped initiate effective conversations and set priorities in situations like these.

## Certification Helps Strategy and Execution Tie the Knot

Moreover, certified pros with a command of how to tailor *Handbook* principles to each unique circumstance also know how to marry strategy and day-to-day implementation. They can answer the questions, “Why did we get into this arrangement? What value are we trying to create? What assumptions are we making? How will we manage risk?”—all those strategic aspects of the alliance. But the principles must also have the ability to be translated into execution,” continued Carberry. “You need people who are strong in both. They may be stronger in either the strategic or operational aspects, but you’ve got to be able to tie those two pieces together.”

Quinlan has seen tremendous value in certifying his charges. Upon his arrival at RingCentral, the marketing team was confounded by the lack of adoption of some of its prebuilt



technology integrations. He urged the team “to go back to the beginning” and reevaluate the target personas and use cases, the joint value proposition, and the messaging associated with the product. They found that “the feature set that is part of this integration wasn’t actually aligned with the people who would be using it,” as Quinlan remembered it. “There was a significant ah-ha moment for our product team, especially when they realized that all of that work, a lot of which is outlined in the *Handbook*, needed to occur.”

## Work Smarter: Strategic Alliance Due Diligence

In Quinlan’s view, the “prework” detailed in the *Handbook* has boosted his teams at RingCentral and PTC considerably. How?

“Identifying what is in it for us, what’s in it for this partner, and what’s in it for the end customers,” he said. “If you can’t clearly articulate and define significant value in all three of those areas, you should stop the partnership and never move forward from that point.”

Quinlan added that getting certified and grasping the concept of value creation helps the alliance practice work smarter. Otherwise, an organization that has “no clue” about what an alliance entails usually experiences a “crazy influx of partnership requests from all over the company” from people who don’t realize how time- and resource-intensive true collaborations are.

“It’s a third party that’s walking them through step by step why you need high-level senior resources and how much time it typically takes because of the volume and effort and work that is required. If they go through the training, they get a pretty good grasp of all of that,” he said.

**“[Certification walks] through step by step...how much volume, effort, and work is required [to manage alliances]. If they go through the training, they get a pretty good grasp of all of that.”**

Sailer has seen a similar deluge of partner requests from colleagues within the organizations at which he has worked, but where he once would have reflexively obliged, certification and the *Handbook* have helped him evolve his approach so that he now systematically evaluates each suggestion and explains why it is or isn’t in the company’s best interests to engage with



the prospective partner. He said the executives understand, appreciate, and accept the results of his due diligence.

“Deciding actively to do nothing is a good thing,” he said, before adding that at other times the reverse is true—he has to convince executives that another prospective partner will help generate leads for both companies, something his training also helps with. “That’s a win, too.”

Where Kendrick was once overwhelmed early in her career when a partner approached her organization requesting to add a new product revenue stream to their agreement—sending her to revisit *Handbook* principles around governance, contract renegotiation, internal and external stakeholder management, and change management—it was second nature to her by the time a similar situation arose more recently.

“The certification, plus the experience and time, bakes all of these things into how I approach the situation and I feel my way through the navigation of the tasks that need to happen,” she said.

Kendrick proffered a metaphor to describe how certification, experience, and networking build on each other to shape seasoned alliance management veterans. Your career, she said, starts as a sheet of paper, and as careers progress, alliance professionals add a layer of laminate coating with each year of experience, each situation, the two certification exams, and the ongoing webinars, events, and sharing of war stories with other accomplished alliance managers.

## Risk, Reward, Partner Performance, and Getting to Yes (or No) Faster

One of Sailer's most memorable use cases, which he detailed at the 2019 ASAP European Alliance Summit, involved a software partner of HPE's that showed great promise but simply wouldn't fully engage with Sailer's team. Sailer initiated a high-level conversation with his counterpart about the partner company's main strategic objectives. It turned out that the organization was high on a cloud-management portal that would be of great value to HPE. Sailer learned that HPE could boost its standing in the partner's eyes by completing the latter's certification program for this particular appliance. The once-reluctant partner was suddenly eager to execute a larger go-to-market campaign, so Sailer consulted the *Handbook's* section on balancing a partnership's "risk/reward" profile.

"How can we find something where we're all aligned together in this, where we're all putting in the same amount of effort and investment, which is the risk side, and that we all expect there to be material reward?" said Sailer.

Certification doesn't just impact the credentialed executive's alliances and portfolio; it is also often a bellwether for partner performance. Although uncertified pros might still be effective partners, "having the CSAP increases the likelihood [of success] drastically. I would probably assume that this person, with an 80 percent chance or more, will be able to handle anything that we really have to deal with in an alliance," said Sailer. "If they've got a baseline CSAP certification, then I feel like it doesn't really matter what type of alliance I'm talking about. They have a good, disciplined mindset on what it takes to partner with someone else in a variety of aspects."

**"The CSAP increases the likelihood [of success] drastically. I would probably assume that this person, with an 80 percent chance or more, will be able to handle anything."**

By contrast, Sailer has found that prospective partner executives who aren't steeped in ASAP's principles often just want access to HPE's sales team or to test their products on HPE's technology rather than proposing an alignment strategy and a potential value for joint customers.

"If I have to ask why [they want to get their technology in our hands] more than three times, that's a disaster," he said.

"The difference is speed," said Quinlan. "You get to a yes or no really, really fast, which is great. Even getting to a no is great because you don't waste your time and you can go find the next yes."

He added that if all things were equal between a set of competitors in a particular field, certification would give an alliance candidate a leg up.

"If somebody tells me that they know [ASAP], that they're certified, and they've read the *Handbook*, I'm instantaneously more apt to dive much deeper with them," he said. With non-certified partners, it is not uncommon for his team to "do a ton of heavy lifting. We have to guide everything, we have to run everything, we have to help them with research and understanding. It takes longer."

## Mastering Nuances: Certification Spurs Innovation and New Value Creation

Carberry said that certified alliance professionals master nuances that impact all phases of the alliance life cycle in ways the uncredentialed typically do not. They command the art of the back hallway conversation to understand how changes at the partner company might affect the collaboration. They do more than just execute the letter of the contract—they sit in on negotiations to understand the spirit of the agreement. They also look for opportunities to expand the partnership using the techniques detailed in the *Handbook* and its biopharma supplement. An inexperienced alliance manager, on the other hand, might overdeliver on a contract, not realizing that it could have legal ramifications down the road.



**“If somebody tells me they know [ASAP], they’re certified, and they’ve read the Handbook, I’m instantaneously more apt to dive much deeper with them. [Otherwise, there’s] a ton of heavy lifting. It takes longer.”**

“Are we fostering innovation, or are we swamped in just executing the agreement and potentially missing opportunities to do something really innovative, something that would create a whole new value proposition?” she said.

On a more practical level, certified alliance managers are more likely to make sure that the team can realistically make good on the deliverables spelled out in the contract.

“Can we actually execute against this agreement? Does the governance make sense? Do we have an initial plan so we can hit the ground running?” said Carberry.

### Upward Trajectory: Certification Gives Alliance Managers the Right Stuff

Luvison believes strongly that certification does more than just put professionals on the right career trajectory and validate the individual; it also raises the profession’s profile. He feels certification should play a role in educating senior management on this fact.

Kendrick agrees. While some have lamented that the CA-AM and CSAP designations aren’t widely recognized outside of ASAP circles, Kendrick has found that the latter certification has changed partners’ approach to her and the partnerships she manages for the better.

“If a partner or peer takes a moment to look up what [the CSAP] is, they go, ‘She’s the real deal,’” she said, adding that partners are more likely to look to her for direction and defer to her now-demonstrated knowledge and experience. “I’m not having to scrap and fight at what we used to talk about as ‘getting a seat at the table.’”

She continued, “Even if someone doesn’t know what CSAP stands for, if they look at that they bet that this is a person who has made a commitment to their capability and career. That starts a conversation at a different place.”

**“If a partner or peer takes a moment to look up what [the CSAP] is, they go, ‘She’s the real deal.’ I’m not having to scrap and fight at what we used to talk about as ‘getting a seat at the table.’”**

“How many positions in organizations give you the latitude and almost require you to operate effectively across levels of the organization?” Luvison asked rhetorically. “How many professions give you the opportunity to actually have to interact and influence people outside of your organization? These are the kinds of things that senior people learn how to do.”

He continued, “One of the ways to prove [alliance managers] are special is that they went out of their way to get this certification.”

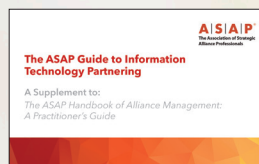
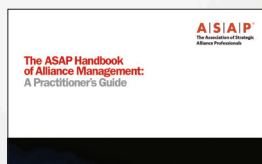
While some C-suite executives may not have heard of the CA-AM and CSAP designations yet, they would likely agree that the results certified professionals are getting out of their alliance portfolios are special indeed. ■

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