# Joint business planning

A joint business plan (JBP) is a useful template for managing and delivering joint strategic objectives for the customer (the agency) and its suppliers/providers. The JBP serves a dual purpose; it is a planning and a reporting tool.

**Instructions for finalising a JBP:**

1. Set up a meeting between the project leads from your organisation and the supplier’s organisation. Ideally, this meeting will be face-to-face and roughly 1.5 – 2 hours in length.
2. Let suppliers know they’ve been chosen because you believe they’re open to innovation and improvement, and that this isn’t an exercise for ‘fixing’ service delivery. Instead, it’s intended to improve outcomes for each party. It’s an opportunity for your organisation to show the supplier what your strategic goals are, so that they can see where they can better align themselves and work with you more effectively. Suppliers are, overall, receptive to the idea of joint business planning as they often conduct similar activities with their own clients.
3. Once you’ve explained the meeting purpose, hold a short brainstorming session with post-it notes for ideas and suggestions to be jotted down. Think specifically about which initiatives would improve things like **delivery, value release, risk exposure** and **relationship development,** etc.
4. Draw a rough Value Proposition Matrix (like the example below) on the whiteboard. Ask everyone to place their post-it notes where they think they belong on the matrix.

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| Park | Strategic initiative |
| Just do | **Top priority** |

Ease of implementation

Potential value

1. Work collaboratively to pick the top 3 or 4 (or however many you like) items from the matrix to put into your joint Business Plan. (You can edit the tables below suit your own approach.)
2. Work through the JBP to complete it, and sign-off to finalise.
3. Your business plan should be reviewed and updated at quarterly business meetings between the customer and supplier. Treat it as a live document that evolves as the relationship does.

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| JOINT BUSINESS PLAN | |
| Agency/customer org name |  |
| Supplier/provider org name |  |
| Version |  |
| Date |  |

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| JOINT BUSINESS PLAN REPRESENTATIVES | |  |  | |  | |
| Agency/customer representative name and signature |  | | | **Representative job role** | |  |
| Supplier/provider representative name and signature |  | | | **Representative job role** | |  |

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| JOINT BUSINESS PLAN TEMPLATE | |
| Purpose | [Short description of the purpose of this JBP and its role in creating joint value] |
| Vision | [Joint vision statement] |
| Scope | [Describe the scope of the JBP in terms of business units, geography etc] |
| Governance | [Insert the agreed relationship governance model and activities]  [Insert roles and responsibilities]  [Insert the review cycle for this specific plan] |
| Stakeholder map | [Identify the key stakeholders and resources from both parties supporting the development and delivery of this plan]  e.g.  [Account Executives]  [Strategic Supplier Relationship Managers]  [Workstream Leads]  [Supplier-specific stakeholders]  [Project- or initiative-specific resources] |
| Relationship charter | [Joint commitment to behaviours and ways of working]  e.g.  [Openness and transparency]  [Honest feedback]  [No blame]  [Professionalism]  [Collaboration]  [Action-oriented]  [Outcome and results focus]  [Mutual benefits] |
| Contract/s summary | [Insert a summary of current contracts]  [Service/products]  [Business units]  [Total contract value]  [Contract start/end dates]  [Key contract milestones/reviews etc] |
| Spend summary | [Spend, as a single figure] |
| Performance | [Performance summary – focus on KPIs that support SLAs, using trending indicators]  [Insert commentary of corrective actions and continuous improvement] |
| Risk action plan | [Focus on key risks that are above the customer/agency risk appetite where collaborative working can mitigate and reduce risk] |
| Relationship development | [Insert the latest summary of agreed actions] |
| Value opportunities | [Insert prioritised value creation opportunities, defining how value will be quantified, the metrics to be used by both parties and how value will be shared in each case] |
| Quarterly plan (write a high-level overview and then apply more detail in the tables below) | [Think of a 30, 60, 90-day plan. The plan is generally made up of four parts, but you can adapt this to suit your own needs]  [Part 1 – PARK – Actions which are anticipated to achieve performance improvement, but which aren’t a priority and can be looked at when more imperative initiatives have gained some momentum]  [Part 2 – JUST DO – Actions that are straightforward, non-onerous, and are expected to achieve good and consistent service delivery as standard]  [Part 3 – STRATEGIC INITIATIVE – Actions agreed to work towards strategic objectives which are important for both parties moving forward]  [Part 4 – TOP PRIORITY – Actions which likely require more resources but should be prioritised for the value they release for both parties] |

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| PART 1 - *PARK* | | | | |
| Initiative/  workstream | **Activities** | **Key dates** | **Owner** | **Comment** |
| [Insert initiative/ workstream] | [Insert bullet point descriptions of activities] | [Insert key dates against each action] | [Name] | [Insert commentary on status, anticipated challenges and any help required] |

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| PART 2 – *JUST DO* | | | | |
| Initiative/  workstream | **Activities** | **Key dates** | **Owner** | **Comment** |
| [Insert initiative/ workstream] | [Insert bullet point descriptions of activities] | [Insert key dates against each action] | [Name] | [Insert commentary on status, anticipated challenges and any help required] |

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| PART 3 – *STRATEGIC INITIATIVE* | | | | |
| Initiative/  workstream | **Activities** | **Key dates** | **Owner** | **Comment** |
| [Insert initiative/ workstream] | [Insert bullet point descriptions of activities] | [Insert key dates against each action] | [Name] | [Insert commentary on status, anticipated challenges and any help required] |

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| PART 4 – *TOP PRIORITY* | | | | |
| Initiative/  workstream | **Activities** | **Kay dates** | **Owner** | **Comment** |
| [Insert initiative/ workstream] | [Insert bullet point descriptions of activities] | [Insert key dates against each action] | [Name] | [Insert commentary on status, anticipated challenges and any help required] |