**lockton/scio partnership summary report**

**MAY 2018**

 

**table of contents**

**page**

**introduction & KEY TARGETS**

**summary themes**

**ovERALL pERFORMANCE & quICK wINS SUMMARY**

**priority partner success factors**

**numerical rating summary**

**partner success factor recommendations**

**PARTICIPANTS & methodology**

**appendix**

* **OVERALL PERFORMANCE FULL FEEDBACK**
* **PARTNER SUCCESS FACTOR FULL FEEDBACK**
* **PARTNER SUCCESS FACTOR DEFINITIONS**

**INTRODUCTION**

This report provides a summary of the feedback gathered on Lockton/SCIO partnership performance and recommendations for continued partnership advancement going forward. This project was initiated by Lockton and embraced by SCIO as a useful step to help set the stage for developing a shared vision to maximize the future growth and success of both organizations.

There was a striking similarity in the tone of the feedback provided from both companies. All participants were forthright and candid in their written and verbal responses, articulate in describing the difficult early stages of working together, but also consistent in their optimism that the partnership was now moving in the right direction with a significant upside potential for both organizations.

This report includes both the written feedback and supplemental comments from the verbal interviews. Much of the language is direct and critical, reflecting a commitment to transparency in communication to help both companies effectively reflect on the key lessons from the past and create a vision for shared partnership success in the future.

The graphic below illustrates the transition in focus that has been unfolding as early-stage issues continue to be resolved. Leaders from both organizations expressed their commitment to ongoing dialogue and action to continue to advance partnership success.

**STAGE I STAGE II**

Learn from the past, move forward

“One Team” mentality

Commitment to transparency

Strategic Opportunities for Shared Growth

Problems/Finger-Pointing

Platform Performance

Contract Resolution

Staffing Challenges

**KEY TARGETS**

1. Successful “Next Stage” Transition
2. Leadership Impact & Communication
3. Partnership Transparency & Code of Conduct
4. Leveraging the Market Potential

**SUMMARY THEMES**

**LOCKTON & SCIO AGREE ON NEED FOR…**

**Transition to the Next Stage**

Acknowledge the significant hurdles that have been challenging and commit to move forward

**Strategic Focus**

Move discussions at the leadership level from tactical/transactional to strategic priorities and visioning for the future

**Transparency**

Commit to transparency in communication and performance

**Accountability**

Continued improvement on follow-up and pull-through

**Communication & Rules of Engagement**

Establish a regular cadence of communication, with the right people communicating in the right forums on the right issues; communicate with respect and clarity

**Technology & Automation Advancement**

Continue to improve technology and automation

**Visioning Partnership Upside Potential**

Significant opportunity for greater shared success through product, platform, market advancement

**ADDITIONAL LOCKTON THEMES**

* Platform performance top priority
* Establish realistic expectations and timelines
* Clarity in communication and prioritization of issues
* Ensure adequate staffing
* Use data driven approach to achieve stated outcomes
* Greater openness to Lockton’s input on issue resolution

**ADDITIONAL SCIO THEMES**

* SCIO team should be viewed as an extension of the Lockton team
* Tone in communication has greatly improved but partnership still feels one-sided
* More direct interaction and access to key stakeholders
* Need to understand full context of what is needed from Lockton
* Rely on process to solve for key issues and requests

**“OVERALL PERFORMANCE” FEEDBACK HIGHLIGHTS**

* Very problematic implementation; significant issues with oversight, lack of process, data management and mapping shortcuts
* Lockton a very difficult partner until recently
* Lockton owns some of the implementation problems
* Partnership has improved with expanded team and improvement in SCIO performance
* Underestimation of scope on both sides
* Partnership still feels one-sided
* Need on both sides for better follow-up and pull-through
* SCIO has made significant investments and adjustments to improve performance
* Continued improvement needed in transparency, prioritization, expectation setting, communication
* Will the partnership be able to evolve to more strategic level?
* January meeting helped significantly in burying issues and moving forward

**“QUICK WIN” OPPORTUNITIES**

**FEEDBACK FROM LOCKTON**

* Establish clear priorities, deliverable dates, roles & responsibilities for 2018
* Work together to create vision of what’s next and advance solution
* Get people excited about product/partnership
* Agree to start fresh and move forward
* Infrastructure improvements to address sluggish performance
* Continue to demonstrate outstanding results in production data set-up
* Don’t limit number of implementations per month
* Tableau report design
* Work together to create joint process document around tickets

**FEEDBACK FROM SCIO**

* Allow the SCIO team access to broader Lockton team and clients (2 respondents)
* Continue to use new tone that has been introduced
* Lockton leaders stay engaged to truly advance the partnership and ensure pull-through on items they see as strategic priorities.
* Use appropriate forums for advancing the partnership
* Establish appropriate touchpoints at different levels – operational, tactical, strategic, product-focused
* SCIO’s team meeting with Lockton account teams to ensure understanding of issues and working together to help account teams.

**PRIORITY PARTNER SUCCESS FACTORS**

**OVERALL “TOP 3”**

1. Leadership Alignment/Partnership Mindset
2. Trust & Transparency
3. Communication

**LOCKTON “TOP 3”**

1. Leadership Alignment/Partnership Mindset
2. Trust & Transparency
3. Performance & Results

**SCIO “TOP 3”**

1. Trust & Transparency
2. Leadership Alignment/Partnership Mindset
3. Communication

**PRIORITY PARTNER SUCCESS FACTORS**

**NOTE TO DESIGNER: MAKE SURE THE FONT FOR THE 12 FACTORS IN THE BAR CHARTS IS READABLE – MAYBE NOT ALL CAPS?**

**LOCKTON’S “TOP 3” RATINGS**

**SCIO’S “TOP 3” RATINGS**

**NUMERICAL RATING SUMMARY**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **PARTNER SUCCESS FACTOR** | **LOCKTON RATING SCIO** | **SCIO**  **SELF**  **RATING** | **SCIO**  **RATING**  **LOCKTON** | **LOCKTON**  **SELF**  **RATING** |
| Performance & Results | **6.0** | **7.5** | **6.8** | **7.0** |
| Leadership Alignment/Partnership Mindset | **4.7** | **8.8** | **5.8** | **6.0** |
| Technology/Platform Infrastructure | **6.8** | **8.3** | **8.0** | **7.2** |
| Communication | **5.3** | **7.3** | **6.8** | **6.0** |
| Ownership & Accountability | **6.7** | **9.3** | **7.3** | **8.2** |
| Economic Value & Sustainability | **5.2** | **8.3** | **7.3** | **7.8** |
| Trust & Transparency | **6.5** | **8.0** | **6.3** | **7.7** |
| Innovative Problem Solving | **6.5** | **8.3** | **6.3** | **7.5** |
| Talent & Staffing | **6.8** | **7.8** | **7.3** | **7.5** |
| Project Management | **7.2** | **8.0** | **7.0** | **7.8** |
| Project Scoping | **6.2** | **8.0** | **6.3** | **7.8** |
| Quality | **7.3** | **7.8** | **7.8** | **8.2** |
| **AVERAGE RATING** | **6.3** | **8.1** | **6.9** | **7.4** |

\*Red & Green highlights reflect low and high scores relative to ratings in that column, not to overall ratings.

**PARTNER SUCCESS FACTOR RECOMMENDATIONS**

**LEADERSHIP ALIGNMENT/PARTNERSHIP MINDSET**

**Lockton Recommendations**

* Use data driven approach to support desired outcomes
* Establish formal planning process to jointly agree on priorities, roles, responsibilities and realistic timelines
* Define what success looks like by developing KPIs linked to priorities
* Schedule monthly check in meetings and other touchpoints
* Work to understand each other’s perspectives; come to mutual understanding of critical problems
* Greater transparency around performance

**SCIO Recommendations**

* Move from transactional to strategic conversations
* Commit to more follow-up and pull-through
* More work to be done so partnership doesn’t feel one-sided

**TRUST & TRANSPARENCY**

**Lockton Recommendations**

* Change tone of communication so feels less like Lockton on offense, SCIO on defense
* SCIO should view investments made for long-term return rather than expense
* More transparency around performance

**SCIO Recommendations**

* Move away from blame – re-set overall tone of partnership
* Continued commitment to greater transparency
* Open up lines of communication

**COMMUNICATION**

**Lockton Recommendations**

* Clearer understanding and communication of priorities/end goals
* Acknowledge when things go well; keep positive

**SCIO Recommendations**

* Continue to move to more open and respectful communication
* Open more lines of communication
* More strategic dialogue at QBRs
* Establish realistic response time expectations

**PERFORMANCE & RESULTS**

**Lockton Recommendations**

* Set realistic expectations and timelines
* Hold each other accountable in respectful way
* Lockton to own their part of it
* Maintain focus on process efficiencies
* Continue to build trust to attain authenticity and fulfill promises

**Technology/Platform Infrastructure**

**Lockton Recommendations**

* Both companies continue to improve technology & automation
* Platform performance must be outstanding going forward

**INNOVATIVE PROBLEM-SOLVING**

**Lockton Recommendations**

* Improvement in responsiveness/escalation of problems needed at times

**SCIO Recommendations**

* Work together to resolve problem rather than focusing on blame

**Talent & Staffing**

**Lockton Recommendations**

* Now that implementation problems behind us, teams must work together on resolving new issues
* Need to continue to ensure adequate staffing at SCIO

**ECONOMIC VALUE & SUSTAINABILITY**

**SCIO Recommendations**

* Scio can insure product is utilized to its fullest through direct interaction with account teams and access to use cases. Will go a long way to increase economic value.

**Project Scoping**

**Lockton Recommendations**

* Tighten up implementation process and timeline

**PROJECT MANAGEMENT**

**SCIO FEEDBACK**

* Addition of dedicated project manager at Lockton should help considerably for the partnership and setting right expectations

**Participants**

**Lockton**

Courtney Hutton AVP, Project Manager

Laura Keaney Project Manager

Mike Mascolo SVP, COO

Janet Moore VP, Manager of Data Analytics

Tammy Quinn SVP, Director of Data Analytics

Bob Reiff President

**Scio**

Jordan Armstrong Director, Sales

Rose Higgins President, North America

Siva Namasivayam CEO

Arun Rangamani SVP & BU Head Care Optimization & Services

**methodology**

Participants were asked to do the following:

* Complete a self and partner numerical performance rating on twelve Partner Success Factors
* Identify the three factors they believe are most critical to enhancing partner performance
* Provide written responses to open-ended questions on overall partner performance and opportunities for “quick wins”
* Participate in a phone interview to provide deeper feedback and recommendations for future success

**APPENDIX**

**PARTNER SUCCESS factor FULL FEEDBACK**

**Leadership Alignment/Partnership Mindset**

**lockton feedback**

Both parties are committed to more frequent and higher quality communication at an executive level. This feels good. Need to make sure it happens. Both parties own this.

Transparency around performance: there is no simple set of metrics that Lockton can track to truly measure SCIO’s performance. We need transparency from a trusted partner mindset to understand

technology platform performance, and success in this area will go a long way to strengthen the

relationship.

Find a way to resolve issues before they become magnified

I think the recent exercise we went through in redefining the 2018 SLA’s highlights the gaps in the partnership mindset/ alignment around shared goals. From the Lockton perspective, we used a data driven approach to support our desired outcomes whereas SCIO did not support their revisions with data, we were simply told “this is how things are done for other customers.”

Formal planning process and meeting to jointly agree on priorities, roles, responsibilities, and timeline(s). Define what success looks like by developing KPI’s linked to the priorities. Monthly check in meetings and routine senior leadership touchpoints in need of being established.

Try to understand each other’s perspective. Speak candidly about issues. Set similar expectations and priorities. Come to mutual understanding of critical problems.

**SCIO FEEDBACK**

Lockton team is extremely ‘transactional’ in their approach and discussions with SCIO. SCIO on multiple occasions has initiated larger strategic discussions/workshops around aligning their larger strategic priorities with the partnership goals, there is an overall lack of follow-up and pull-through from the Lockton team. Bob and even Michael (of recent) are able to articulate their vision, to which SCIO iterates on possible solution approach, and there is often no follow-up or pull through from the Lockton team. Our team invests a significant amount of time and even resources to support these discussions and activities.

We are making progress on this. More education and leadership showing teams and leading by example will go a long way. Also, both sides should get out of nickeling and diming every issue.

While the tone has changed of late, the partnership feels very one sided – again SCIO expected to leap through hoops to constantly demonstrate partnership but it is never reciprocated. We are often bludgeoned over the head with emails, RFP responses, contract language but if SCIO takes a similar path we aren’t good partners. We do feel that Bob has worked with his team to improve the situation and we are looking forward to working with Mike who also is setting a different and more collegial tone.

Lockton is a marquee client for SCIO, and so any positive, constructive tone, and good ideas to improve from both sides if taken in constructively would help the relationship to get to a good place.

**Trust & Transparency**

**LOCKTON FEEDBACK**

Successfully addressing leadership alignment/partnership mindset will go a long way in building trust.Both sides need to develop a partnering mindset. Changing the tone of our interactions is needed. Often feels like we are on offense and SCIO is on defense. Feels like we need “rules of engagement” to build this area up.

There is a very solid working relationship that has been developed between both teams, however there is a trust issue with leadership. Too much focus on the wrong things impedes our growth in this area. Statements made during the sales process have not come to fruition and have led to significant mistrust and a belief that promises are going unfulfilled. There have been ruffled feathers due to unfulfilled promises. Sometimes it feels as if they are holding back because they underestimated the complexity of our relationship. My desire is for them to see any investment they have had to make for long term return instead of expense. They have continually expressed expense they have had to spend to be able to deliver. Where we disagree is that we understood much of that was already in place.

Transparency around performance: there is no simple set of metrics that Lockton can track to truly measure Scio’s performance. We need transparency from a trusted partner mindset to understand technology platform performance, and success in this area will go a long way to strengthen the relationship. (same comment given by rater for Leadership Alignment)

**SCIO FEEDBACK**

SCIO team has been very transparent with Lockton on all the areas of the partnership, but Lockton has historically not shown this though in recent developments and QBRs we hope to improve on this front.

The Lockton team has historically laid blame vs. work with the SCIO team to effectively resolve. T&T is decidedly one sided – SCIO into Lockton but not vice versa.

Executive level meetings quarterly face-to-face to have an open conversation on what went right and what went wrong and how we can do better.

Open up more lines of communication between Lockton and SCIO.

Overall lack of transparency from the Lockton team, communication and discussions are extremely one-sided and largely revolve around laying blame on the SCIO team for something they believed was historically committed or for a delivery escalation. Unwillingness to move forward and reset the overall tone of the partnership, historical items are continuously used as levers for negotiation and finger-pointing.

**Communication**

**lockton feedback**

Have a clear understanding of priorities/end goals

Communicate with clear objectives in mind. Prioritize issues consistently across both organizations and all internal teams. Acknowledge things that are done well. Keep positive.

**SCIO FEEDBACK**

The tone is improving and we thank Bob & Mike for their assistance and look forward to continuing improvement in this area.

SCIO has been constantly engaging and working with Lockton, on trying to keep the communication lines open enabled by tools like DIT, PTS (major investments from the SCIO side). Lockton has always been one sided on their communication with a more defect and finger pointing mode, which in recent times have reduced largely. We are hopefully embarking on a more open and mutually respectful path with regards to communication.

We’ve been balancing the number of forums, cadence of communications, and overall timeliness of response. We need to continue to engage directly and leverage the tools implemented to support information needs (PTS, DIT). We’d like to have strategic discussions at the QBR and work to enhance the partnership where possible. One area we need to improve is the expectation that the SCIO team is available 24/7 and response timeliness expectations are often unreasonable/unrealistic.

Executive level meetings quarterly face to face to have an open conversation on what went right and what went wrong and how we can do better.

**Performance & Results**

**LOCKTON FEEDBACK**

It took longer than we had anticipated for SCIO to perform at the level we expect. While it has improved significantly, SCIO did not anticipate the complexity of our application even though we communicated in detail why we would be different than their typical client during the sales process. During implementation, there were misses on the Lockton team as well, however due to lack of adequate project management on SCIO’s part, Lockton leadership was not aware of the issues until very late in the implementation plan.

Set realistic expectations and timelines.

There has been improvements in our working relationship for advancing new analytics developments.

Establish clear goals, objectives, priorities, roles, responsibilities and agreements that define success. Hold each other accountable in a respectful way knowing we are both in this together. Own our side of the street. This ties to Priority Leadership Alignment/Partnership Mindset as well.

To improve our relationship, we have to maintain focus on processing efficiencies. To achieve success, our attention must be to continue to build trust with those we work with in order to attain authenticity and fulfill promises. SCIO has to fulfill the promises they made during the sales process, and our teams together must work towards continuous improvements. If we work together, SCIO will continue to grow their revenue with added membership in the application. We have to advance our analytic capabilities and deliver superior results. This will serve both SCIO and Lockton.

**TECHNOLOGY & PLATFORM INFRASTRUCTURE**

**lockton feedback**

I believe there’s an opportunity for both SCIO and Lockton to improve upon technology and automation. On the Lockton end, we use several platforms to track information about groups in InfoLock, several of which are homegrown/access databases. I’ve used Salesforce at previous companies I’ve worked for and I think our division of Lockton (I’m not sure if other departments already have Salesforce) would benefit from a consolidated CRM tool. I can’t speak for the rest of my department, but I know in my role it would benefit me to understand how much revenue each group in InfoLock generates, but I don’t currently have access to that information. Similarly with SCIO, I can tell they’ve invested heavily in their current tools which do allow us to get at the information we need, but you still need to go to multiple platforms to get all the information you need, and there’s definitely an opportunity for some manual processes to be automated.

Technology platform performance: implementation issues are now behind us. SLA’s are limited in what they measure, and SLA targets are less than the performance we consistently need. Platform performance must be outstanding over the next year for Lockton to truly leverage the investment.

**INNOVATIVE PROBLEM-SOLVING**

**lockton feedback**

I think the Operations/Data Management team at SCIO is very responsive and is willing to help us solve customer issues, but I have experienced instances where an issue I consider to be high priority goes a few days without a response, or, when a response is provided, it doesn’t answer my initial question. There are also instances during the data acquisition process where the team does not put appropriately escalate an issue, and they generally don’t implore any new tactics to try to get a response out of a carrier.

**SCIO FEEDBACK**

On multiple occasions it has been more important to Tammy to assign fault versus working together to address the problem. The overall tone of communication when working through conflict resolution has often been extremely negative and unproductive. The SCIO team has gone above and beyond to effectively and efficiently address identified problems, regardless of fault and well beyond contractual obligations.

**ECONOMIC VALUE & SUSTAINABILITY**

**SCIO FEEDBACK**

SCIO to ensure that the product is utilized to the fullest by the Lockton account teams through high-level of training, demos, and question and answer sessions and also showing them how to solve the issues. We know a lot of about the platform and if we can get use cases from account managers – we can show. Getting into practical use of platform will go a long way to increase economic value.

**Project Scoping**

**lockton feedback**

Tighten up the implementation process and timeline

**PROJECT MANAGEMENT**

**SCIO FEEDBACK**

SCIO has heavily invested in the management area to manage the expectations from Lockton, and only recently Lockton has reciprocated the same with a dedicated PM for this project – Laura. Lockton had been reactive due to many of the issues due to not having a PM who can set the right expectations internally. So for the first 12 months of the relationship, SCIO was burdened with managing the project for both parties without T&T for most part of it. In future, due to the recent hire by Lockton for a dedicated PM augurs well for the mutual relationship. Communication, T&T, Ownership, Scoping, Quality – all of these & more are based on reality & perception and a PM in Lockton will hopefully help set the right expectations.

**Talent & Staffing**

**lockton feedback**

Adequate staffing and burnout should be continually assessed. There is a concern that the SCIO team is spread too thin and that burnout could be an issue. The Lockton team is pretty solid however project management skills can be improved on the analyst team. Keeping good people and providing good career progression and compensation improvements is needed. Recruiting talent for the analyst team has always been a problem. Salary improvements must be made to attract talent.

Now that most implementation problems have been resolved, both teams must work together when resolving new issues. Less focus on what is in and out of scope, placing blame or defending poor performance will make us more efficient. Open communication with agile problem resolution with the intent for superior results can only benefit both SCIO and Lockton.

**“OVERALL PERFORMANCE” FULL FEEDBACK**

**LOCKTON’S FEEDBACK ON SCIO PERFORMANCE**

There were many, many issues during implementation. During that time there was also a ton of turnover, both good and bad. Last year at this time it seemed like SCIO was not prioritizing Lockton, acknowledging the depth of issues, or assigning enough resources to resolve the problems. Things started to improve after SCIO created a remediation plan. It took a while for SCIO to resolve their staffing issues, but the team in place now is really great. There are still issues, but overall we are in a much better place now.

Implementation was horrific, unorganized and significant turnover caused major issues. All of this has improved greatly. The data team is strong and we now have a data tracking inventory mechanism in place which is being fine-tuned as needed. We are in a much better place on the data acquisition side.

I think the data management/operations teams are very dedicated and responsive, and I think for the most part they have a good handle on project management. I think their short comings are things that can be addressed going forward. For example, we see a lot of the same types of issues pop up related to carrier mappings, and there’s no way to report when exactly this has happened in the past, and how it was resolved. I’d like to see more investment from SCIO when it comes to identifying and documenting root causes to prevent future issues from happening; they rely too heavily on e-mail communication.

8 months ago I would have given SCIO’s performance a 4 on a 1-10 scale. SCIO has worked their way to a 6-7 following heavy resource deployment, change in resources on our account, process improvement, and implementation of tools to assist with data mapping and workflow. I believe SCIO underestimated the data collection effort which started our relationship off on poor footing. At times it feels like the relationship is “us vs. them” and not a partnership given the initial circumstances we were dealing with on our end. I believe we own a good portion of turning this into more of a partnership. We need a strategic partner in this space given the importance of data analytics.

In my experience the day-to-day relationship with SCIO is now going very well. They are responsive and willing to help, and some issues that arise are out of their control. I enjoy working with them and I think the only areas I’d really like to see improved are related to technology/automation and improved quality controls/documentation of issues.

Implementation was poorly performed. There was little performance oversight for keeping the process on track. Lack of process was not communicated to Lockton leadership. Data management was poor, inventory was not documented, and mapping short cuts were taken. All of this had disastrous impact on our initial launch. Quality Control was poor. Basically, the first six months were somewhat of a “ramp up” period where problems happened and we would have to tell them how to resolve. They overcommitted in the implementation plan and did not provide adequate oversight. Critical staffing on their teams burned out and left at critical times within the project scope.

Tools have been developed to address the inventory problems that have significantly improved SCIO’s data management abilities. The tool developed is also being incorporated with other clients. We helped them build this tool and our suggestions will only help them be more efficient.

Past performance has been less than desired on the part of both parties. That is now behind us. We just need solid blocking and tackling right now to build momentum.

**SCIO’S FEEDBACK ON LOCKTON PERFORMANCE**

Lockton’s performance has been fair and has improved (to be fair due to SCIO’s improved performance). The communication was more focused too much in the weeds initially. But it has improved as SCIO’s performance improved.

Lockton has been very one-sided in their pronouncements around issues – categorized mostly as SCIO problems – and rarely has been a case where Lockton taking ownership on the issues. This specifically applies to data acquisition process & acknowledgement has trickled in now with Lockton stating DIT tool is helping them with their needs. Given the magnitude & breadth of the project, Lockton could have been more collaborative and an understanding partner in the first three quarters of the project. The negative effects of the Lockton commentary has drained SCIO’s operational leadership directly. For the last month or two, there are visible positive changes to this status and Lockton is increasingly appreciative of the SCIO work products.

SLA behavior was pretty typical example of the disconnect between SCIO’s view v. Lockton – SCIO held to “intention” not the actual language of the SLA. SCIO overpaid the first round of SLAs, the second round we got the same treatment in the assessment of SLAs – intention over facts. Revised SLAs for 2017 and go forward.

Lockton team appears to delegating ownership and tasks more appropriately across their team. Introduction of new PM has addressed some of the historical communication breakdowns. Still an overall lack of follow-up and pull-through on several items that are articulated as key initiatives.

**LOCKTON’S FEEDBACK ON ITS OWN PERFORMANCE**

Lockton could have done a better job of tracking files transferred to SCIO during implementation. We also had slight turnover in order to achieve strength in the correct job function. Our PC team is strong and the right people are in the right roles. We have processes in place and have improved significantly.

I think our team at Lockton is highly accountable and committed to delivering high quality work. The structure of our team allows people to really dive into their “lane” and I think everyone has the autonomy to get their job done the way that suits them best, as long as they adhere to deadlines and are effective communicators. The only areas of opportunity I see for our improvement is the documentation of existing processes, roles and responsibilities, and onboarding.

Lockton shares responsibility for some of the implementation issues. There are definitely things we could have done better. I also feel like we have not been able to move past some of the implementation issues.

Started out very patient and understanding which quickly deteriorated once the data collection process experienced issues. I initially thought we were being unreasonable then quickly realized the predicament we were in with the client teams and clients. I commend the team for pulling together to work our way back to a favorable position with the Series. I do feel it says a lot that we were able to collectively work our way through a challenging situation and still have, for the most part, a healthy working relationship. That said, many upgrades are needed including transparency, prioritization, clear roles, responsibilities expectation setting, and communication. This all needs to be done in the spirit of collaboration and partnership without tone and baggage being brought into the picture.

Various shortfalls occurred without adequate communication with the full project management team. The impact of lack of communication contributed to the implementation problems that were revealed after we launched. A full-time position was created to work more closely with SCIO’s data management team to keep closer attention on client onboarding, escalation issues, and implementation mapping processes. This has dramatically improved our ability to keep things moving.

**SCIO’S FEEDBACK ON ITS OWN PERFORMANCE**

SCIO has agreed to look at the long term partnership value and has agreed to address all outstanding issues (SLAs, Custom development requests) with a 300K investment. SCIO had started the conversation on SLA revisions last summer and Lockton has finally agreed to come to the same page on the SLAs.

It took much longer than anticipated for SCIO’s performance to improve. There was initial stumble due to underestimation of Scope on both sides. And over time, SCIO’s performance has improved to now a positive one. Also, meeting between stakeholders in January really helped to bury old issues and move forward.

SCIO has made significant investments and adjustments to ensure we are appropriately supporting the overall partnership needs and governance. While the overall ‘noise’ has calmed down, there is concern around whether the Lockton team will ever allow the partnership to evolve to a more strategic level. There are continuous one-sided partnership investments requests from Lockton.

We struck a separate agreement to resolve outstanding partnership issues (SLAs, dev requests, membership counts – 300K investment). We started the conversation on SLA revisions last summer and it took Bob pushing to get Tammy to respond. Always turfed back as a SCIO issue. Exasperating.

**Partnership Success Factor DEFINITIONS**

1. **Performance & Results:** Partners are committed to achieve optimal outcomes, continually strive to reach next level of performance and have clear accountability lines and tracking in place.
2. **Leadership Alignment/Partnership Mindset:** The philosophy, strategy and resource discipline of the leadership of the partner organizations are closely aligned and there is a mutual belief and commitment to the potential for shared success.
3. **Technology/Platform Infrastructure**: Partner technology solutions allow for the delivery of superior product and services and are able to integrate effectively between partner organizations.
4. **Communication**: Partners are effective communicators and understand the potential impact of both positive and negative communication on the partner relationship.
5. **Ownership & Accountability**: Partners take responsibility for their actions, hold themselves accountable to resolve issues as needed, and believe self-accountability is a cornerstone of trust in the partnership.
6. **Economic Value & Sustainability**: Partners perceive a high level of “contract integrity”, believe their relationship produces outcomes that have high economic value, and are confident in each other’s business model and potential for a long-term prosperous relationship.
7. **Trust & Transparency:** Partners have developed a relationship based on mutual trust and are open and transparent in their interactions with one another.
8. **Innovative Problem Solving**: Partners are committed and able to intervene to solve problems quickly and effectively and have appropriate encounters when problems occur and as they are being resolved.
9. **Talent & Staffing**: Partners place high value on human capital, excel in putting the right people in the right roles, and have strategies in place to address talent gaps should they occur.
10. **Project Management:** Partners use a systematic approach to planning and guiding a project from start to successful completion.
11. **Project Scoping:** From the outset, partners are able to articulate a clear blueprint for stated project goals.
12. **Quality**: Partners have high standards for product and process quality and continually work to meet or exceed standards.