



KLR Consulting

Inspiring Success in Your Leaders and Teams

CorEdge Talent | Success Story

“Kristi is a fantastic facilitator,” says DeLynn Senna, co-founder of CorEdge Talent. “She is understanding and compassionate, while still making sure we are accountable, have the hard conversations, and accomplish our goals.”

And there were definitely tough questions and hard conversations, as DeLynn and her partner, Catrina Simbe, worked to craft a **partnership charter** as a foundation and framework for their new business.

What is a Partnership Charter?

A partnership charter goes beyond the legal partnership agreement to address the working relationship of the partners. It’s a document that clearly outlines the goals, expectations, responsibilities, and relationships of the principals. The process of creating the charter allows partners to talk about difficult, sensitive issues and create guidelines and structures for how to handle them before they turn into crises.

“I had discovered the Partnership Charter book [*The Partnership Charter: How to Start out Right with Your New Business Partnership (or Fix the One You’re In)* by David Gage] while researching the CorEdge partnership, and I asked Catrina to go through it with me.” DeLynn made going through the process mandatory, because she knew that it would set the new business up for success.

“The author had researched partnerships for two decades and determined that they will fail for one of nine reasons. If you can anticipate those nine issues, talk about them in advance and agree on how you’ll deal with them if and when they arise, your probability of success shoots off the charts,” says DeLynn.

Catrina agreed, and the two realized they were going to need a skilled facilitator to ensure they had the hard conversations and did it right.

KLR Consulting Facilitates Partnership Charter Retreats

DeLynn and Catrina had met Kristi when working with another client and were very impressed with her facilitating, so they asked her to facilitate the process.

CorEdge Talent

Industry: Staffing & Recruiting

Challenges:

- Starting a new business as partners.
- Wanted to build a solid foundation for the partnership.
- Need to understand each other’s work styles better.
- Want to get new employees off to a great start.

KLR Solutions:

- Partnership Charter
- Retreat facilitation
- DiSC[®] assessment
- DiSC[®] coaching
- Ongoing DiSC[®] for onboarding new employees.

Benefits of KLR Programs:

- Written partnership charter document.
- Framework for partner decisions & handling issues.
- Greater understanding of communication styles.
- Faster onboarding with greater employee retention.

“She agreed, and we spent three full days on it, turning the book into a workbook and going through every single chapter, every potential issue.”

DeLynn continues, “Kristi was the perfect person to walk through this with us. She had already taken us both through the DiSC[®], so she had a good understanding of both our work styles and our communication styles. Her ability to be compassionate with us, but to also make sure we were having the tough discussions and going through the uncomfortable parts even when we wanted to stop, was exactly what we needed.”

“Kristi is brilliant. Her energy, her compassion and enthusiasm for the leaders and businesses she works with is profound. She is just exceptional.”

~ DeLynn Senna,
Co-founder, CorEdge Talent

Both partners came into it willing, and even excited, to do the hard work, but Kristi made sure they answered the questions. “If one of us wasn't being fully truthful, or fully authentic, or giving a full answer, she would press us, or probe deeper, ‘What else? There seems to be more on your mind, can you elaborate?’ things like that. Sometimes she really did have to pull complete answers out of us, because the questions are hard.”

Intense Work, Great Support

Even after day one, once it was clear just how intense this process could get, they were still committed to it, largely because Kristi made the environment safe, comfortable, and encouraging. So even though the process could get

uncomfortable, Catrina and DeLynn both felt supported and safe.

Over three day-long sessions, the two explored a broad spectrum of issues including what becoming partners would mean to each of them, how their roles would change, and their expectations of each other. Many people are more comfortable negotiating with their clients than their partners.

“Kristi has experience with partnerships; having seen the good and the bad, so she understood the value of this process and could shift our perspective and remind us of how beneficial the work was when necessary.”

Kristi helped to document everything discussed, and helped turn it into a written partnership charter, a confidential document that the two partners have signed and that they can reference when they need to be reminded of how they agreed to handle certain situations, especially when emotions are running high.

“Catrina and I may never actually need to reference our charter, because we've done so much of the hard and emotional work in advance. We may have worked out potential roadblocks and problems before they arise by doing this,” says DeLynn.

Every Partnership Needs to do This Work...with Kristi!

DeLynn says that Kristi's preparation for the meetings was very thorough, she was completely engaged as a facilitator and coach, and "she was so enthusiastic about how critical this work was to our long-term success, for the sake of the company and for our employees!" Kristi understood how important it was that DeLynn and Catrina were making this investment in order to have a solid foundation to build the company on.

"There are so many partnerships out there that need to do this, and they need to do it with Kristi! It is entirely worth the time and the expense."

Partners have a duty to one another, they are going to sink or swim together, and the actions of one partner affect the others.

This is a process that can help partnerships realize their dreams, rather than nightmares. Too many things can go wrong for partners *not* to spend the time and energy to make their existing partnership healthier. The process of crafting a partnership charter enables you to plan and build a stronger, more vital and more resilient partnership.

The right facilitator makes the difference between going through the motions and getting great work done. DeLynn says, "Kristi's facilitation style is fantastic for this. She creates a safe environment where you can be vulnerable and open and honest and transparent, and can also challenge each other. She is very engaging and you trust her immediately, and she is tough when she needs to be, keeping you honest and thorough."

KLR Consulting continues to work with CorEdge Talent, administering the DiSC[®] assessment to all new employees to improve the onboarding experience, and coaching as needed.

"Kristi is brilliant. Her energy, her love and compassion for the leaders and businesses she works with is profound. She is just exceptional."

"There are so many partnerships out there that need to do this, especially in Silicon Valley, and they need to do it with Kristi! It is entirely worth the time and expense."

*~ DeLynn Senna,
Co-founder, CorEdge Talent*

To learn more about KLR Consulting and how we can help you, visit our website at www.klrconsulting.com