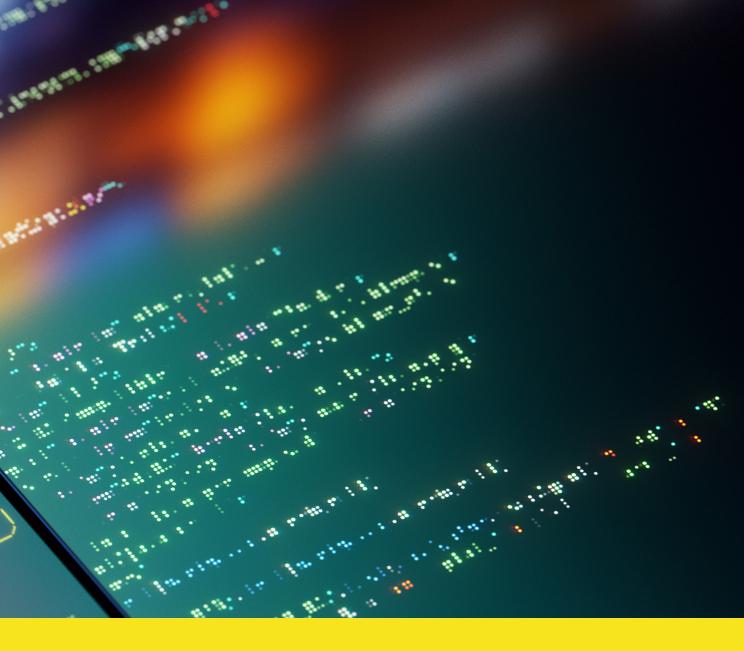# Partnering's Open Spaces

Out in the Great Wide Open, Under the Skies of Blue, There's Many an Industry Where Partnering and Alliances Are in Development, Evolving, or Still Feel Brand-New

And...

- No Nukes: Alliance Escalation Myths Exploded
- GenAI: Is It Real? Is It Here? Did It Write This?
- O Captain! My Captain! How Alliance Professionals Navigate Change

GenAI Did <u>Not</u> Write This Article…or Did It?

No, It Took Human Creativity to Bring This to You. But GenAI Apps and Services Are Rapidly Rewriting the Book on Alliance Management by Automating, Integrating, and Speeding Up Tasks—and Giving Partnering Professionals Time Back in Their Day

By Jon Lavietes

Few technologies have made such a broad impact in such a short amount of time as generative AI (GenAI), the more advanced form of AI that can mimic the human brain by researching and summarizing documents and websites; generating new text, slides, images, audio, and video based on human commands; and answering questions about what's contained in a massive load of structured and unstructured data. Powered by what's known as "large-language models," applications like OpenAI's ChatGPT, Microsoft Copilot, Anthropic's Claude, and Google Gemini are helping people to comb the entire internet and produce full research papers or generate original written, audio, and visual creative content.

GenAI's relatively incipient penetration into the business world over the past year or so has already wrought dramatic change. More specifically, alliance managers around the world are starting to ask how they can apply GenAI to their jobs, and although the applications are still nascent and evolving, some answers are starting to emerge. Broadly speaking, GenAI can be viewed in two categories: 1) "consumer" uses that can be undertaken immediately and incorporated into daily routines independently, and 2) department- or line-of-business–level services that will likely require the involvement of IT and possibly other stakeholders.

What's the Use Case? GenAI Functions Put Time Back on Your Side

Jessica Baker, chief program officer at partner consultancy AchieveUnite, a company focused on helping leaders and organizations thrive through the development of trust and dynamic partnerships, is a self-described "early adopter" of GenAI technologies—and not just one.

Baker uses the app Grammarly to help compose documents around tougher subjects and even correct spellings and offer suggestions as pieces are being composed, now that the app has learned her voice and style. The program Superhuman helps "triage" Baker's inbox and streamline emails into several categories, such as calendar- and schedule-related correspondence, client messages, and newsletters. The app also helps compose full responses based on one or two simple commands. Using Supernormal's AI notetaker product, Baker records conversations, produces transcriptions, and automatically spits out summary bullets along with assigned action items, which can come in handy for alliance managers keeping and recapping JSC meeting minutes, for example—notetakers can expedite the all-important process of facilitating agreement among all parties on the key decisions that were made at the JSC meeting.

There are several other competing options for each of these use cases, plus a bevy of vendors that focus on even more narrow GenAI functionality—for example, software manufacturer guidde's solution automatically turns print how-to manuals into training videos.

Your GenAI **Cheat Sheet**

What It Can Do

- ✓ Compose documents, including emails and social posts
- ✓ Convert text documents into presentation slides
- ✓ "Triage" and categorize email inboxes
- ✓ Record and transcribe conversations and meetings, creating bulleted summaries
- ✓ Transform printed manuals into how-to videos
- ✓ Assemble research findings for use in written documents
- ✓ List pros and cons of specific decisions
- ✓ Help users navigate partner portals and find the information they need via an AI assistant or chatbot
- ✓ Allow partners to create tailored, self-service enablement journeys
- ✓ Generate a business analysis as well as market and partner insights

The Caveats

- ✓ You'll need to fact-check it; did it get its information from legitimate, reputable sites, or from internet conspiracy theories and misinformation?
- ✓ GenAI engines sometimes make incorrect inferences and thus "learn" inaccuracies, called *hallucinations*
- ✓ Be sure you protect your company's and your partners' data and information: Anything entered into public-facing consumer AI applications instantly becomes public domain, thus some companies ban employees from using certain AI apps for this reason

GenAI technologies?
"I love the possibilities."

"I love the possibilities," said Baker.

Many of the tools you're probably already working with now come with built-in GenAI capabilities. Zoom now features an AI assistant button that enables meeting hosts to perform tasks that are similar to an AI notetaker. LinkedIn allows you to generate full social posts with a few prompts. The enterprise version of Google Workspace, the search giant's answer to Microsoft Office, has Gemini integrated into it as an add-on.

Gabriella Laszlo is the founder of KloudGem, a consultancy that specializes in Google Workspace training and effective implementations. She and her clients are getting time back in their days by having Gemini "summarize, bulletize, condense, expand, change the tone" of content within Google Docs, create project trackers from scratch in Google Sheets, generate images using text descriptions within Google Slides, and whip up new backgrounds and adjust lighting in Google Meet.

"Think in Triplicate"

The aforementioned competitors of Gemini also come with these capabilities. Each consumer GenAI engine can convert text documents to presentation slides or other formats. For alliance managers looking for a starting point in getting to know these technologies, **Jay McBain**, chief analyst for channels, partnerships, and ecosystems at Canalys, recommends using three or more of these services—he uses ChatGPT, Gemini, and Claude—to compose a blog post, presentation, or research document, then mix and match the best of each.

"Think in triplicate," he said. "They all have their strengths." For example, with access to Google's search engine, Gemini "knows stuff that happened yesterday," whereas ChatGPT might be better for historic context than incorporating recent developments.

"They all have their strengths." Gemini "knows stuff that happened yesterday," whereas ChatGPT might be better for historic context.

Come On, GenAI, Lighten Up!

Jim Chow spent a decade at Google Cloud and is now at the forefront of GenAI applications as partnerships and business development leader at AI21 Labs. His experience tells him that users first experimenting with lightweight use cases should "treat the GenAI engine almost like you're talking to a person interactively. 'Generate me an email to tell a partner that the partnership is being terminated,'" he said.

Upon examining the first generated draft, Chow said users can then make further revisions using additional commands. "'Tweak this first sentence a little bit to make it sound more

friendly versus going straight into the bad news." Further instructions could be issued with the next draft. "'The tone of this is still too dark and depressing. Let's lighten the tone some more.'"

Laszlo urged beginners getting their feet wet to ask GenAI apps to "help think with you when you're making decisions in certain areas," such as listing the pros and cons of certain outputs. "It's almost like asking a colleague to help you brainstorm. If you're feeling like you're not looking at all the facets of a problem area, it can kind of help you round out."

> **"It's almost like asking a colleague to help you brainstorm. If you're feeling like you're not looking at all the facets of a problem area, it can kind of help you round out."**

Is It a Matter of Fact, or Are We Just Seeing Things?

To do this, GenAI applications usually have to search external sources, and that brings us to our first major risk with these services: data integrity. Obviously, the internet is loaded with conspiracy theories, misinformation, and outright garbage. GenAI isn't necessarily going to know a good source from bad.

"You want to fact-check what it says," Laszlo cautioned. "You definitely need to check on the accuracy piece. It's useful not so much for factual things but in idea generation."

> **"You definitely need to check on the accuracy piece. It's useful not so much for factual things but in idea generation."**

Even more problematic, GenAI engines tend to make inferences as they consume additional pieces of information and "learn" new facts, resulting in false conclusions called "hallucinations." In one high-profile court case, a man who sued an airline based his case on several fictitious court decisions invented by ChatGPT. McBain noted that one of the pluses in applying multiple engines to a single initiative is that "you can also see hallucinations" when they return different sets of facts that don't align.

Keeping Private "Brains" Out of the Public Eye

Once alliance and channel professionals have figured out some basic cheat codes for daily administrative activities, such as content and scheduling, they can start to wade into some of the more dynamic use cases in that second department-level category—many of which are made possible by applying GenAI to their proprietary documents—that are emerging in the industry and affecting all aspects of organizational collaborations.

But first, all stakeholders must understand the next major risk that comes with these services: Anything put into the public, consumer-facing versions of them instantly becomes public domain. Last year, Samsung banned employees from using GenAI engines after one employee uploaded sensitive code into ChatGPT. Fortunately, GenAI applications can be integrated with proprietary company systems and other software vendors' products and services, allowing clients to keep their intellectual property away from the public internet. These private AI "brains" are hosted on secure cloud platforms, such as those of the "Big Three" hyperscalers AWS, Google Cloud, and Microsoft Azure.

"Your documents don't have to leave your infrastructure," said Baker. "The AI engine will come in and read all of those [documents] and translate them and be able to answer the questions, but your documents aren't actually found in AWS or Google."

Google Workspace's Business and Enterprise editions come with a setting that empowers clients to wall off their files from the public Gemini portal and the consumer Google search engine.

"For small businesses and definitely for enterprises, you want to make sure that your data is protected, so that whatever you input doesn't get into the [GenAI] model, and you can protect your information, as well as your clients' and your partners' information," said Laszlo.

> **"You want to make sure that your data is protected, so that whatever you input doesn't get into the [GenAI] model, and you can protect your information, as well as your clients' and your partners' information."**

Death to Manual Portal Searches

GenAI can improve the partner experience in a multitude of ways. Add a GenAI assistant to a partner portal, and this once unwieldy mess of hundreds of thousands of marketing, sales, training, and product files suddenly becomes manageable for the thousands of technology, channel, service, and consulting partners sifting through them.

Users can ask the GenAI assistant questions or issue commands in plain language, such as "Give me technical manuals for fintech APIs," or "Which go-to-market documents pertain to the Asia-Pacific region?" said **Will Yafi**, founder and CEO of ecosystem enablement software platform vendor TIDWIT. GenAI can then summarize those documents, many of which are several dozen pages in length, and/or condense them into a few summary bullets.

It can help mine videos, as well as text. Query, "Where in this video does Active Directory appear?" and the engine might tell you to fast forward to minute five, Yafi explained.

"Portals quickly become the cemeteries of documents because of their sheer volume or because they are not properly indexed. If you apply AI within the knowledge repository, then you don't have to remember where the document was stored," Yafi added.

> **"Portals quickly become the cemeteries of documents because of their sheer volume. If you apply AI within the knowledge repository, then you don't have to remember where the document was stored."**

Journey to a New Journey

Just a couple of years ago, vendors were lauded for saving their partners time and headaches by assembling onboarding "journeys": self-guided, prescriptive, and sequenced packages of classes, videos, how-to documents, and trainings that were tailored for each partner. (See "Self-Guided Tours in Partnerland," *Strategic Alliance Quarterly*, Q3 2021.) But for all of the convenience these journeys have provided, we're now starting to see some of their limitations.

> **"Within six months or one year, [the journey] is completely out-of-date. The product has changed, information has changed. It's better to have an intelligent chatbot up front."**

"Within six months or one year, [the journey] is completely out-of-date. The product has changed, information has changed. That's useful for a very short amount of time, but it's not sustainable," said Chow, who added that the onus is on companies to spend relatively scarce partner management resources to continually update these journeys. "It's better to have an intelligent chatbot up front."

Indeed, AI can now empower partners to put together their own journeys without the vendor or service provider's assistance, and organizations can allow them to customize their journeys in even more granular ways.

I'm Looking Through You: AI Develops X-Ray Specs

Technical professionals from partner companies span a variety of levels and backgrounds. According to Yafi, a simple question like "What's the difference between this year's version of the course and the 2023 version?" can save a more experienced developer several hours of repeated viewing and reading. Three different developers might be at three different levels in terms of familiarity with a partner's software specs—one might know only "a to b," another "a to c," and the last one "b to c" of a partner's training syllabus, said Yafi.

"Are you going to create a curriculum for each one of those different levels? That would be impractical and costly. And so, they typically end up doing one-size-fits-all training, which might waste unnecessary time for the learners. Gen AI can save time and effort by honing the learner in on what they are missing to deliver the ultimate customized skilling that helps them attain their goals," Yafi added.

"Gen AI can save time and effort by honing the learner in on what they are missing to deliver the ultimate customized skilling that helps them attain their goals."

Feel the Power! AI Insights, Analysis, and Integration

Applying AI to both structured and unstructured data is a bit more complex. It could entail integrating GenAI applications with document repositories and CRM and PRM platform data. Yafi has seen instances in which GenAI is analyzing marketing campaign data from both CRM applications and the interactions with enablement and learning content (videos, written content, etc.).

"Combining both environments drives better and smarter [partner] readiness, which aligns with revenue. Think of it as a constant feedback loop between revenue coming in, and the enablement needed to make it happen. Now you're really starting to understand the power of AI, revenue readiness, and enablement," said Yafi.

"Think of it as a constant feedback loop. Now you're really starting to understand the power of AI, revenue readiness, and enablement."

Those who do not have the resources to integrate CRM and PRM platforms can still mine other documents for invaluable go-to-market insights. Baker noted that many territory documents, revenue summaries, and market segment analyses often get converted into text files and spreadsheets that can be fed into GenAI engines. This opens up a world of possibilities.

"How much [business] did CDW do with us last year? What are my best partners in the state of Washington to introduce my new program to?" said Baker, providing examples of some insights that can be retrieved in seconds. "What's going on with deal registration in India? What's going on in the Northeast? What's going to close?"

How to Speak the CEO's Language? Asking for a Friend

AchieveUnite offers clients its Partner Success Hub, which allows them to query its proprietary knowledge bank of alliance, ecosystem, and channel best practices, guides, and how-tos using a ChatGPT-like interface. This, too, lets customers condense what would normally be laborious and time-consuming endeavors into quick prompts and instant answers.

"I'm a new partner, and I'm not sure what training I need to take. I'm a new partner, what's the process for deal registration? Boom, here it is," said Baker, describing how it can be applied in the onboarding phase.

"I'm a new partner, and I'm not sure what training I need to take. And what's the process for deal registration? Boom, here it is."

Clients can ask about a specific aspect of AchieveUnite's domain knowledge, such as how to integrate the partner ecosystems of two large entities after a merger or acquisition.

"People can come and ask [our GenAI assistant] rather than wading through an 80-slide PowerPoint," noted Baker.

Baker illustrated the full range of capabilities of the Hub's GenAI interface with a hypothetical scenario of a partner executive prepping for a meeting with the CEO of a company's largest partner.

"What are CEOs concerned about? What are some of the metrics I need to know? What do I need to know about partner economics so that I can speak in the language of a CEO? Help me understand how to say this in a way that an executive would understand or grasp this. Help me take this five-page document and summarize it in four bullet points that I could put onto a PowerPoint slide," said Baker.

"What are CEOs concerned about? What are some of the metrics I need to know? What do I need to know about partner economics so that I can speak in the language of a CEO?"

Don't Just Take the Internet's Word for It

By using GenAI solutions that can easily wall off the corpus of knowledge so it's limited to just your company's documents, alliance managers can reduce another headache that comes with integrating consumer-grade GenAI apps: the need for extensive "prompt engineering," which refers to the process

of training and filtering these models to distinguish the line between relevant and irrelevant information, an unavoidable exercise when you need to combine proprietary and public information into one repository.

Chow used an example of a pharmaceutical company that specializes in vaccines. If reps and doctors ask about treatment recommendations, it is imperative that results are limited to valid internal research documents and trusted information sources—and that they don't include content from homegrown remedy websites or conspiracy theory purveyors from the internet.

> ## "With general-purpose GenAI engines, a lot of prompting, testing, filtering work needs to be done just to get to the right and correct information."

"With many of the popular general-purpose GenAI engines [being] trained from general information across the internet, a lot of prompting, testing, filtering work needs to be done just to get to the right and correct information," said Chow. However, if a GenAI solution can make it easy to only search proprietary and approved documents, "this makes it much easier for the companies implementing GenAI, and more importantly, minimizes the risk of GenAI generating misinformation."

AI Confidential

This brings us to a larger best practice in applying GenAI to your content: Less is more.

"This is an interesting thing that people don't necessarily realize. They think the more information they give the AI, the smarter it gets. No, not necessarily," said Yafi. "In fact, the less knowledge you give the brain, the more focused it will be; and the more general knowledge you give that brain, the less focused it is going to be, leading to hallucination/generalization issues that miss the mark."

> ## "People think the more information they give the AI, the smarter it gets. Not necessarily."

Above all, the most important best practice in using GenAI, particularly for these department-level uses, is to convene IT, security, privacy, legal, and the partner teams to understand the risks and collectively learn how to implement these engines with proper guardrails, according to Yafi.

"What's the optimal IT model? What is the optimal privacy model? What is the optimal sharing model? What is the optimal security model? All will determine how AI gets used, [and] as important, whether or not and when it can be shared with the alliance partner."

Chow cautioned alliance professionals and other stakeholders not to use these services under the company's radar without the IT department's blessing, especially when involving any company confidential or proprietary information.

"Otherwise, the confidential data in those docs or prompts could be exposed to GenAI models or be leveraged in an unauthorized fashion," he said. "It's always safer to stick with your company's licensed and approved technologies for work-related use cases. For personal use of GenAI services, I always recommend you review the terms of the service and how they will use or not use your data."

> ## "It's always safer to stick with your company's licensed and approved technologies for work-related use cases."

Put Training Wheels On…or the Wheels May Come Off

Laszlo urged companies to learn quickly, so that they can turn around and train their employees on proper usage.

"It's really important that users in an organization understand how this works and organizations set up ground rules," she said. "IT should put in guardrails around access to AI and clarity on which settings they use."

> **"It's really important that users understand how this works and organizations set up ground rules. IT should put in guardrails around access to AI."**

She added, "The company should form policies around AI and train its users on what to expect. They should communicate whether AI functionality is turned on or off at the organization, teach users about how they can and cannot apply AI, and what's an approved AI tool, if any."

Time Waits for No One, and AI Won't Wait for You

Although there will be a lot of learning on the job for all parties, most acknowledge that partnering professionals and the companies that employ them have something very valuable to gain by starting their GenAI journey as quickly as possible: time.

"We often hear, 'I don't have enough time in the day. I'm always doing this, that, and the other things because my partners are asking me to do it.' Why can't partners be allowed to do it safely for themselves?" said Yafi. "If GenAI is used properly and securely, alliance managers can start focusing on things that really make a difference in the relationships with those alliance partners that they deal with."

> **"If GenAI is used properly and securely, alliance managers can start focusing on things that really make a difference in the relationships with those alliance partners that they deal with."**

Baker exhorted everyone to think in terms of *how* they will tackle the data security, training, and user hygiene challenges, rather than *if*. She issued a reminder that the business world held similar discussions in the early days of the cloud, and it lived to tell the tale.

"Everyone was screaming about the same types of things: adoption, security, costs. We're having that same conversation right now, but it's a technology and a way of life that is going to permeate everything that we do, so let's get on the bandwagon," said Baker. ■

Start Me Up: Turning On and Tuning In to GenAI

How should an alliance manager get going with GenAI? To get you started, we broke initial uses into two categories: 1) general office tasks and 2) alliance management–specific use cases.

For General Office Tasks

1. **Have GenAI write or research a business or personal initiative.** Compose a poem, ask for a sales presentation template, generate the first draft of a white paper on a particular topic, list pros and cons of selling a drug in a certain disease area or a particular region. You can even task the GenAI engine with creating an image—picture, head shot, etc.—based on a text description.

2. **Try using at least three public GenAI services to conduct this one task** (e.g., OpenAI's ChatGPT, Anthropic's Claude, Google Gemini, Microsoft Copilot). Mix and match results by selecting the tone and wording from each that best suits the document.

3. **Have a "conversation" with the GenAI engine to further refine the output.** Change a paragraph to be more warm and friendly, tweak a sentence to modify a description or adjective, change a color in the image produced by the GenAI service.

4. **Fact-check results.** Verify that all assertions made by the GenAI assistant are factually correct. Check all links the engine has included as references.

5. **Expand into other GenAI apps.** Once a comfort level has been reached with basic GenAI functionality, try other GenAI-powered services for transcription and notetaking (AI Note Taker), writing (Grammarly), or email inbox management and response (Superhuman), and other bureaucratic/administrative tasks.

Applying GenAI to Alliance Management

Before getting into specific alliance management use cases, companies must keep a few principles in mind:

- **Don't put any proprietary data or intellectual property in the public domain!** Each GenAI service can be integrated with existing company systems or other software applications directly from the cloud. Where applicable, such as when using Google Workspace's Gemini functionality, make sure settings are adjusted to prevent sharing data with the publicly available version of the service.

- **Convene IT, security, privacy, legal, and alliance management to discuss what data to apply GenAI to and how to do so in a safe, user-friendly way.** Since best practices are still taking shape in this arena, the parties should approach the development and continual refinement of appropriate procedures as a collaborative effort. They should adequately train users inside and outside of the alliance management group on the dos and don'ts and similarly adjust training as each department gets a better understanding of how individuals will use GenAI.

- **Focus use cases on a concentrated set of documents.** Less is more when it comes to feeding AI brains information. Users will get more focused output if they use more targeted data sets.

With the proper guardrails in place, a few alliance management–specific applications of GenAI technology are taking root:

- **Portal searches** – Scour the thousands of manuals, trainings, videos, white papers, and other files packed in partner portals by issuing instructions or questions in plain English, such as "Give me technical manuals for fintech APIs," "Which go-to-market documents pertain to the Asia-Pacific region?," or "How does a company integrate the partner ecosystem of an acquired company?"

- **Onboarding** – Empower partners to put together their own enablement "journeys," self-guided, prescriptive, and sequenced packages of classes, videos, how-to documents, and trainings. Those with more experience and proficiency in a certain technology can ask in plain English about updates to curricula and differences between versions of courses. Or enable partners to get up to speed on basic partner processes, such as deal registration.

- **Go-to-market insights** – Mine territory, revenue summary, and market segment analysis documents and spreadsheets for information on total business done or the best-performing partner in a certain region or product area.

Maximize your
A|S|A|P® MEMBERSHIP

FACILITATING THE ADVANCEMENT OF STRATEGIC PARTNERSHIP GROWTH

Helping you become a **partner of choice** and achieve greater **results**.

Knowledge and Resources

- ASAP Content Hub
- *ASAP Strategic Alliance Quarterly*
- *ASAP Strategic Alliance Monthly*
- ASAP Blog
- ASAP Job Board
- ASAP Member Directory

- ASAP Professional Development Guide
- *ASAP Handbook of Alliance Management*
- *The ASAP Guide to Biopharmaceutical Partnering*
- *The ASAP Guide to Information Technology Partnering*
- *Creating Alliance Value*
- *Partners Are the Customer Experience*

Events and Community

- ASAP Global Alliance Summit
- ASAP BioPharma Conference
- ASAP European Alliance Summit
- ASAP Webinars
- ASAP Collaborative Connection Monthly

- ASAP Online Communities
- ASAP Roundtable Series
- ASAP Alliance Excellence Awards
- ASAP Locals

Education and Credentialing

- CA-AM Certification Exam Prep Workshops
- CSAP Certification Exam Prep Workshops
- ASAP Workshops
- ASAP Master Classes
- ASAP TE-AM Alliance Training Workshops

> *As a practitioner of collaboration in a variety of perhaps non-traditional alliance functions myself, I've found so many key elements of partnering and collaboration management for synergistic outcomes were perfectly encapsulated by ASAP's offerings.*
>
> **—Kevin Little, CSAP**
> *Senior Partnership Director*
> ***Novo Nordisk***

A|S|A|P®
The Association of Strategic Alliance Professionals

Contact our team at +1-781-562-1630 or visit **www.strategic-alliances.org** today!

www.strategic-alliances.org   tinyurl.com/LinkedINASAP-Co   facebook.com/ASAPGlobal   @asap_Global