International Collaboration – Needs, Essentials and Pitfalls
by Marcy Phelps and Udo Hohlfeld

Marcy Phelps Describes Her Problem
As an independent information professional, it’s easy to fall into the Lone Wolf Syndrome. You become so accustomed to working alone that it becomes difficult to let go and trust any part of your work to someone else. The problem is that sometimes clients need something outside my area of expertise. Since it makes little sense to send them elsewhere when these situations arise, I’ve learned to work with several trusted subcontractors that help me provide a wider array of information services.

One of the first projects that I outsourced offers a great example of how easy and productive it can be when you call in an expert. In this case, it helped me uncover information I would not have found otherwise, and it added a much-needed international perspective to the project. This example also highlights the value I continue to receive from my membership in the Association of Independent Information Professionals (AIIP – www.aiip.org). And, since it was my first experience working with another researcher, I learned several lessons.

Project Background
My client, the head of a creative agency specializing in business-to-business product launches, was in the early stages of a rebranding project. The client was working with a company that had recently been acquired by a German firm. My client asked me to help them develop a presentation for their client by finding the following information:

1. What other companies has the parent firm acquired, and what have they done regarding branding for these companies?
2. What is the perception of these companies and their products, both globally and in the United States?
3. What can be found regarding acquisitions and/or product launches for some of their competitors?

4. What can be found regarding branding after business acquisitions in this industry, as well as other business-to-business industries?
   Specifically:
   - How do they use sub-brands?
   - Are there examples of companies keeping their names after acquisition?
   - How did they use the parent company in the logo?

My client had a short timeline. Ideally, they wanted the research within three business days. After some discussion, we agreed that the project would be completed in two phases. Questions 1 and 2 would be sent within three business days. Questions 3 and 4 could be completed two business days after that.

**Project Strategy**

I first checked English-language sources, including Dialog, Dow Jones Factiva and SkyMinder. Dialog File 551 (TFSD Worldwide Mergers & Acquisitions) provided the information I needed about what companies the parent firm had acquired. SkyMinder had a great company profile that helped round out the data.

It wasn’t long before I realized that this project would not be complete without a search of German-language sources. The big problem was the timing, however. Not only was I facing a short turnaround time for the project, it was now Friday afternoon here in Denver, Colorado. Also, I had no idea where to start. How do I find a qualified researcher on such short notice?

I posted a message to AIIIP-L, the AIIIP private email discussion list, asking if anyone could recommend a German researcher. It wasn’t long before I had two responses, and both suggested I contact fellow AIIIP member Udo Hohlfeld. Udo responded quickly, considering it was Friday night in his time zone, and we quickly came to an agreement regarding the following components of the project:
   - My client’s outstanding questions
   - How much time he would spend on the project
   - When and how the information would be delivered to me
   - Cost and payment method.

Over the weekend, I sent Udo the information I had already found and a list of my specific questions. He said that he would start first thing Monday morning his time.

**Project Outcome**

Thanks to the time difference, the results of Udo’s research were waiting for me in my inbox when I started work on Monday. He had confirmed what I discovered about the acquisitions. He also found some great information about the acquiring company’s branding strategies and the public perception of the company and its brands. One article, however, was in German, and for it to be useful to me it needed to be translated.

I was able to compile most of the information we found that answered the first two questions and send a report to my client by close of business Monday, per their required timeline. Udo provided the translation of the branding strategy article by Tuesday morning, and I sent my client the update before they arrived in their office.

Over the next two days, I completed the second phase. Since I knew my client would not have the time (or the inclination) to read all the documents we retrieved in the course of the research, I distilled much of the information into an executive summary. I also created charts that would help them visualize and compare the various approaches to branding sub-brands, using Udo’s helpful translations.

My client let me know that his team was very pleased with the research, and he even sent me their presentation. In it, they included the charts I had provided, and they inserted a number of quotes from Udo’s translated articles. He also said that his client was impressed with the thoroughness of their preparation.

I was happy I took the plunge and trusted someone to work with me on this project. From this experience, I found that it’s well worth the effort involved to incorporate into certain projects the sources and the perspectives of researchers from all over the world.
Essentials for Collaboration

I learned several lessons from that first collaboration and continue to learn something new each time I work with other information professionals on client projects:

**Plan ahead.** I was fortunate that Udo was available on such short notice and his research fit my budget. The time to consider working with subcontractors is when you’re working on the proposal.

**Look to trusted sources for referrals.** I turned to my AIIP network and found two people who had worked with Udo and recommended him. Make sure you develop your referral network before you need it, though.

**Be aware of time differences and how they can affect your deadline.** In this particular case, the time difference worked to my benefit. This might not always be the case, so take time differences into consideration when determining a reasonable project timeframe.

**Be sure to discuss and put in writing all agreements.** Always make sure both parties are familiar with and agree to what information is needed, as well as time, format and budget requirements.

**Discuss how and when payment will be made and in what currency.** Udo and I used a PayPal merchant account for this international transaction, but there are other options. Make sure both parties agree before starting the project.

**Work as a team.** Share goals with and get input from your subcontractors, and communicate clearly to avoid duplication. Be sure to provide feedback and discuss results.

Since this project, I have worked with several colleagues throughout the world. Their telephone, language or subject expertise helps me put together a richer and more robust finished product than I could ever provide as a lone wolf.

Project Insights from the Collaboration Partner

As a German competitive intelligence specialist I have long enjoyed the benefits of an international network of information professionals. On a Friday evening a call for help from my fellow AIIP member Marcy Phelps arrived in my inbox. I learned that she needed regional expertise and local language skills as Marcy worked on a project that involved a German company. As Marcy was in a tight timeframe, we agreed that we should exploit the advantage of being in different time zones and that starting early Monday morning central European Time would be sufficient to deliver valid answers to her open questions before the Monday morning deadline Central Mountain Time. Meanwhile Marcy would send me all of her results to avoid double work. The payment question also was easily solved as we decided to use the PayPal service, a simple and relatively secure way to transfer money between different countries and currencies.

Early Monday morning I started working on the open questions making use of specific German language sources. Within three hours I was able to confirm Marcy’s findings and to add important insight into the acquiring company’s marketing and branding strategy. Of course, I offered to translate some of the German sources into English. As I myself was on a tight deadline for another project that I had postponed half a day to support Marcy, the translation could not be done before the following day, Tuesday.

After all, this project starting out in the United States shows how easily the project scope can become international. In such a case the use of partners with special regional and local expertise and language skills adds importantly to project success and client satisfaction. The benefits of this special project are:

- The customer is satisfied with the outcome of the expert research.
- Marcy Phelps could impress her customer with superior results within a tight timeframe.
- AIIP, once more, proved to be of high value to its members.
- I have a new customer (Marcy Phelps).

But an international collaboration process is not always this easy and smooth. Marcy and I were able to operate the way described due to our professional association, which sets a sound framework for subcontracting and partnering among its members. Without such backing from an established, international association many pitfalls can destroy an international collaboration project.

Remember the goal of such a partnership is to connect skills and resources at affordable costs and to enrich the project with access to a broad range of
expertise and local/regional expertise as well as language skills. Partnering can also add to complexity, and complexity has to be managed as many issues may arise. Of course, one enters into a partnership or subcontract with the hope that there will be no issues. In fact, with careful planning, that can be achieved.

**Pitfalls to Avoid**

_Dealing with different cultures._ Working with partners from other geographic areas means that other cultures and values are involved. Remember to consider this fact in your communication style. Adjust any of your communication so that it will not embarrass your partner.

_**Work ethics.**_ Values and ethics differ from culture to culture for a good reason. Yet, in the end your work is evaluated by your customer’s standards. So make sure that your partner sticks to your ethical standard of business conduct. Have the partner sign an agreement of ethical business conduct – this can also be part of your subcontractor agreement.

_**Language barrier.**_ Your partner most likely will communicate with you in your language; yet, s/he is not a native speaker. Make sure that your partner completely understands the task and what is expected from her/him. Have your partner provide you with a task restatement in her/his own words.

_**Skills.**_ Are you sure your partner has the right skills to support your project? Educational standards, quality standards and general education standards do vary from country to country. Request any appropriate proof of skills to make sure you are talking to the right professional for your task.

_**Intellectual property/copyright.**_ Make sure that all information you obtain from your partner is in compliance with legal rulings. This topic particularly needs a clear, honest and realistic discussion. Be prepared for the possibility that your partner is bound to more strict rulings than you are in your jurisdiction and educate your customer accordingly.

**Working without written agreements.** Do you know the sender-receiver problem: You say “A,” and the person you talk to understands “B.” These misunderstandings can happen to anyone for various reasons. When communicating with non-native speakers of your mother tongue miscommunication is particularly a pitfall. Therefore, even under tight deadlines, you should always set up a written contract containing in easy and unambiguous phrasing:

- a thorough description of the task and expected outcomes
- schedule
- delivery terms
- payment terms
- quality standards
- code of ethical business conduct.

_**Ad hoc partnering.**_ Nowadays, the Internet and Web 2.0 technologies enable many individuals to promote their services and expertise globally. Collaboration across borders is easy from a technological viewpoint; yet, there is no guarantee of a successful collaboration. Avoid ad hoc partnering, unless, as Marcy and I showed, it is among the trusted members of an established association, which requires its members to adhere to standards and professionalism.

This review is as far as the theory goes, but of course in business reality things are not always so clear and easy. You should be prepared for the questions and issues of partnering, no matter whether locally, nationally or internationally.