



The Partnership Triangle Playbook: A Blueprint for Successful Collaboration



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Executive Summary

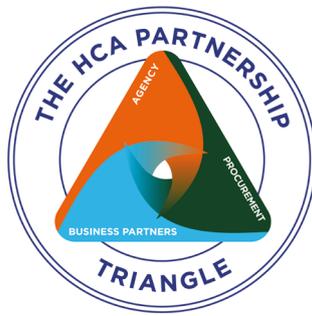
This playbook provides a comprehensive blueprint for establishing and maintaining effective relationships between business partners, procurement partners, and agency partners. Ultimately, such partnership-based relationships support all stakeholder groups to achieve better outcomes for patients, healthcare professionals, and the organisations our industry serves.

In practice, the playbook helps all partners plan more effectively by strengthening three pillars across the triangle:

Transparency (clarity, openness, and shared accountability), **Value** (effectiveness, efficiency, and impact delivered through the partnership), and **Relationship** (trust, behaviours, and collaborative ways of working that sustain partnership).

Based on extensive industry research and stakeholder consultation, conducted in 2024 and 2025, it addresses the critical challenges facing all three partners within the Partnership Triangle. It offers practical strategies, tools, and perspectives on fostering collaboration and trust to achieve mutual success.

The playbook recognises that partnership-building is not a “one and done” process that starts and finishes at the agency partner selection stage, but requires intentional, continuous curation aligned with evolving needs. It is intended for leaders and their teams across all three stakeholder groups, who are committed to genuine strategic partnerships that build healthier, more consistent ways of working across the triangle.



*“Eight chapters. One continuous journey.
From recognising partnership challenges to embedding trust, action,
and sustainable success to achieve partnership health.”*

1. Introduction and Purpose

- **What this chapter does:** Sets the scene for why partnership health matters in today’s healthcare communications landscape
- **What you’ll take away:** An understanding of the purpose of, and the challenges to, partnership health, and the Healthcare Communications Association (HCA) Partnership Triangle model that underpins this playbook

2. Understanding the Partnership Triangle

- **What this chapter does:** Defines the three stakeholder groups and explains how partnerships evolve across a relationship lifecycle
- **What you’ll take away:** Clarity on roles and responsibilities, how partnerships differ by organisation, and the five-part journey to an optimal partnership

3. Overarching Challenges

- **What this chapter does:** Explores the key pressures, both internal and external, that test even the strongest of partnerships
- **What you’ll take away:** An honest view of the shared challenges faced by business, procurement, and agency partners, and how these challenges can impact transparency, value and relationships

4. Guiding Principles for Effective Partnership

- **What this chapter does:** Translates lessons from research into clear behavioural principles
- **What you’ll take away:** Seven foundational habits that anchor effective collaboration

5. Collaboration Strategies and Best Practices

- **What this chapter does:** Shows how to apply behavioural principles in day-to-day working relationships
- **What you’ll take away:** Practical collaboration methods that sustain partnership health

6. Practical Tools

- **What this chapter does:** Provides templates and frameworks to enable measurable and repeatable good partnership practice
- **What you’ll take away:** Ready-to-use tools that embed consistency and trust

7. A Call to Action

- **What this chapter does:** Turns principles into behaviours, and outlines what each partner can do right now and over time
- **What you’ll take away:** Clear, immediate, and sustained actions for business, procurement, and agency partners to strengthen collaboration across the triangle

8. Moving Forward Together

- **What this chapter does:** Brings the journey full circle, reinforcing commitment, shared accountability, and optimism for the future
- **What you’ll take away:** A unifying call for trust, transparency, and partnership excellence, together achieving what no one partner can alone

1

Introduction And Purpose

What this chapter does:

Sets the scene for why partnership health matters in today's healthcare communications landscape

What you'll take away:

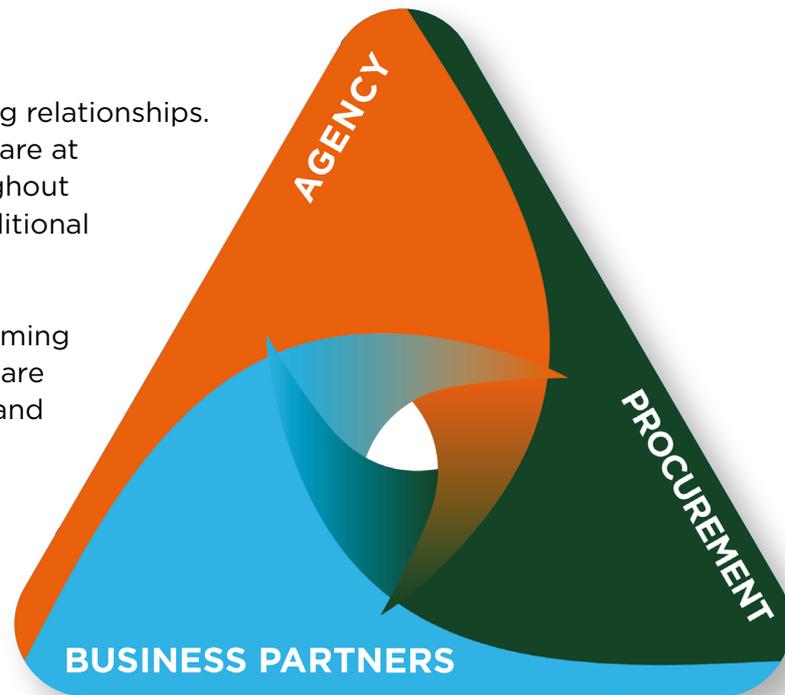
An understanding of the purpose of, and the challenges to, partnership health, and the Healthcare Communications Association (HCA) Partnership Triangle model that underpins this playbook

Chapter 1: Introduction And Purpose

The Current Landscape

Partnerships form the foundation of strong working relationships. In healthcare communications, these partnerships are at a critical juncture, with industry discussions throughout 2025 consistently highlighting issues straining traditional working relationships.

The healthcare communications landscape is becoming more complex for all partners, and external forces are putting increasing strain on how we plan, govern, and deliver work together. Macroeconomic conditions, cost inflation, pricing pressure, political and regulatory change, shifts in the agency market, and the rapid introduction of AI and automation are reshaping expectations and ways of working. In this climate, partnership behaviours can be tested as each party responds to genuine constraints, including budget limits, speed-to-delivery demands, compliance requirements, and operating model change. Cost pressures, for example, can be unavoidable and may need to be shared across the ecosystem, but the way these pressures are communicated, negotiated, and managed matters more than ever, with transparency, clarity, and respect helping to protect trust and delivery quality. For agencies, the same environment can mean tighter margins alongside higher delivery complexity, more variable resourcing needs, and greater commercial risk when scopes shift or decisions slow, which makes disciplined planning, early risk surfacing, and consistent ways of working essential across the triangle.



Despite universal recognition of the value of collaboration, factors such as misaligned expectations, opaque processes, and legacy issues continue to create barriers. When combined with the exacerbating external factors above, these have made partnership building more complex than ever.

Why this Playbook Matters

This blueprint aims to address the urgent need to optimise the Partnership Triangle: the three-way relationship between business, procurement, and agency partners. When these groups work effectively together, the results are powerful: heightened trust, a strong return on investment, streamlined resource deployment, and business outcomes that are exceeded. When partnerships falter, all parties suffer through wasted resources, unmet objectives, and diminished trust.

Partnerships should not be viewed as purely transactional or one-off events, but as evolving relationships that depend on intentionally curating an agency portfolio that matches changing business partner needs, required capabilities, and cultural fit. This playbook offers practical, actionable strategies and tools to help all partners do this well in today's complex and dynamic environment.

Our Approach

This document synthesises insights from many sources, including:

- Direct stakeholder feedback from across the industry
- Healthcare Communications Association (HCA) Partnership Triangle research
- PM Society Members Summit 2025 findings on trust and collaboration
- Incorporated Society of British Advertisers (ISBA)/Institute of Practitioners in Advertising (IPA) best practice frameworks
- World Federation of Advertisers (WFA) Project Spring initiatives

Full definitions can be found in Chapter 2

How to Use the Playbook

Each chapter is written to offer equal relevance and value to each stakeholder group in the Partnership Triangle.

The next chapter introduces the Partnership Triangle itself, defining its three stakeholder groups, termed corners, how they interact, and why understanding these dynamics are the foundation for all effective partnerships.



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2

Understanding The Partnership Triangle

What this chapter does:

Defines the three stakeholder groups and explains how partnerships evolve across a relationship lifecycle

What you'll take away:

Clarity on roles and responsibilities, how partnerships differ by organisation, and the five-part journey to an optimal partnership

Chapter 2: Understanding The Partnership Triangle

Defining the Partnership Triangle

The HCA facilitated the development of the Partnership Triangle model to spotlight the interdependent relationships between three stakeholder groups:

- **Business Partners**

Functions within pharmaceutical, biotechnology, and broader life sciences organisations, which engage external agencies and consulting partners to deliver against their strategic requirements. These functions include, but are not limited to, advocacy and patient relations, clinical development, communications, corporate affairs, corporate citizenship, government affairs, insights and analytics, market access, market research, marketing, medical affairs, operational excellence, and public affairs.

- **Procurement Partners**

Commercial-partnering functions that help manage external partner relationships, processes, and governance, alongside their business partners. Depending on the company's size and maturity, these teams may include category management, sourcing operations, business specialists, or broader enterprise procurement leads. They also collaborate with finance, legal, compliance, and operations teams to ensure fair, transparent, and value-driven engagements that balance cost, capability, and risk management.

- **Agency Partners**

External-partner organisations that support the full range of functions described within the business partners definition, including (but not limited to) advocacy, business consulting, internal and external communications, corporate, digital/technology, marketing, medical, patient engagement, policy and government affairs and scientific. These partners vary widely in size, specialism, ownership model, and geographic footprint, encompassing networked groups, independent agencies, specialist boutiques, and cross-disciplinary consultancies. They provide strategic insight, scientific and creative development, digital and data innovation, and tactical delivery support, working alongside business partners and procurement to drive effective, compliant, and impactful communications.

Throughout this playbook, the terms “business partners,” “procurement partners,” and “agency partners” are used as shorthand for the three stakeholders within the Partnership Triangle.

Not all companies have dedicated procurement partners or sourcing functions. Where they do, collaboration works best when procurement teams are included from the outset of strategic planning rather than only being brought in at the contracting stage. In many cases, independent procurement consultants or agency management advisors work directly with business partners, operations and legal teams to support sourcing, onboarding and ongoing evaluation processes (see Chapter 5).

The Partnership Lifecycle: From Pitch to Performance

Viewing partnership management as an evolving relationship lifecycle rather than isolated events helps ensure collaboration remains intentional and adaptable to changing business needs.

Partnership renewal can occur at different points, either through a new search and selection process or through the realignment or transition of an already well-established relationship. When appointing a new agency, many organisations will run a formal procurement or pitching process to meet internal policy and governance requirements and to support commercial negotiations and contracting. However, approaches vary by organisation size, maturity, and operating model, and may include approved rosters or frameworks, incumbent reviews, phased competitive processes, or consultant-supported sourcing. In all cases, the intent is the same: to assess capability and collaborative fit, establish clear expectations, and formalise ways of working that support best practice across the partnership.

To ensure adaptable collaboration, the partnership lifecycle can be viewed in **five interconnected phases**:

1. Needs Assessment

Internal business foundations built for partnership success

- Procurement partner to be engaged early to ensure commercial governance, process clarity, provide supplier market intelligence and expedite workflow. It may be helpful to form a cross-functional working group with participants from procurement, business partners, and any other internal functional teams
- Business partners need to align internally on the requirement to change or start a new partnership, including business objectives and communication priorities.
- Depending on established internal governance processes, this may include taking steps to repair the current agency partnership or transition to another incumbent agency partner before seeking a new agency partnership

Business partners will usually take the lead to confirm requirements and available budget and define success metrics and decision-making responsibilities. Procurement partners may facilitate this process if multiple internal teams' requirements need to be captured.

2. Selection

Internal alignment translates into an open, transparent selection process.

- Business partner collaborates with procurement partner to determine the most appropriate partnership selection approach, translate the agreed requirements into evaluation criteria, and ensure transparency on scope, expectations, and timeline throughout the process
- Procurement and business partners are thoughtful and realistic about the time and effort required from agency partners during the selection process
- Communication flows may be controlled during key points of the selection process. For example, agency and business partners are typically discouraged from discussing selection decisions or commercial arrangements during an ongoing selection process
- Procurement and business partners are encouraged to communicate clearly and frequently with agency partners. It is good practice to provide as much advance warning of an upcoming selection exercise as possible. During the selection process, it is best to provide regular updates so that agency partners can manage their resources and align with internal stakeholder expectations
- All three parts of the Partnership Triangle are aware of the briefing, transparent assessment criteria, and final decision-making process

3. Activation

Turning shared intent into a working partnership.

- The Partnership Triangle works best when there are shared **Transparency**, mutual **Value**, and collaborative **Relationships** – representing the three pillars of the Partnership Triangle. Under these pillars, business partners, procurement partners, and agency partners align on a shared definition of success, priority outcomes, and how impact will be measured, including agreed decision-making responsibilities and escalation routes
- All partners align on the Partnership Assessment approach (shared approach to developing and tracking mutually agreed KPIs and confidence sentiment; see Chapter 6) and capture a baseline point-in-time view
- Business partners and agency partners translate strategy into a clear scope and delivery plan, including timing, dependencies, and required inputs, with procurement partners supporting commercial governance and ensuring the scope aligns with contracting and policy requirements
- Procurement partners lead or support contract finalisation (SoW, commercials, rate cards where relevant, payment terms) and ensure practical clarity on how work will be commissioned, approved, and tracked

- All partners co-develop a partnership charter that sets expectations for transparency, collaboration behaviours, meeting cadence, documentation standards, and ways of working, including how to handle changes in scope and priorities
- The partnership is mobilised through a structured kick-off, onboarding, and access set-up, so the agency can deliver efficiently from day one.

4. Evolution

Maintaining momentum and alignment as needs and context change.

- All partners run a defined cadence of performance and partnership health reviews, combining delivery metrics with behavioural feedback and risk tracking
- Partners might find it helpful to bring the Partnership Assessment and Index scoring into these reviews. Partners score the agreed pillar KPIs (that align with the Trust, Value and Relationships pillars), plot the radar chart, and add a simple confidence sentiment (“gut feel”) score. The index should guide a constructive conversation, not replace it, focusing attention on a small number of improvement actions. Improvements over time will be visible as the radar graph for each partner becomes a clear triangle and the overall Partnership Index score increases.
- Business partners keep briefs current as strategy evolves, and agency partners proactively surface emerging risks, resourcing constraints, and optimisation opportunities early, rather than late in delivery
- Procurement partners support governance discipline by reinforcing agreed change control and commissioning processes, helping avoid scope drift and protecting shared value across the ecosystem.
- All partners maintain transparency on budget, workload, and pipeline planning, so resourcing and timelines can be managed realistically and sustainably
- Where issues arise, partners use agreed escalation and resolution pathways, with clear ownership and time-bound actions to restore alignment and trust.



5. Renewal or Transition

Closing one chapter well and preparing for what comes next.

- Partners plan for renewal, re-competition, or transition, including timing, responsibilities, data and asset handover requirements, and communications, so continuity is protected
- Business and procurement partners agree on the approach to continuation or re-selection in line with governance and policy, and communicate clearly with agency partners on process, timing, and expectations
- Consider using the latest Partnership Assessment score and index trend, alongside discussion outputs, to guide the closeout review, so learnings are captured and carried into the next cycle
- All partners run a closeout review that captures what worked, what did not, and what should change next time, covering both delivery outcomes and partnership behaviours
- Where a transition occurs, partners implement a transition plan that protects patients, healthcare professionals, and the organisations our industry serves by minimising disruption to critical work
- Learning is documented and shared, so improvements feed into the next partnership cycle and strengthen overall ecosystem performance over time

Each phase requires key tools, behaviours, and collaboration routines, detailed in Chapters 5 and 6.



Variations in the Partnership Model

The Partnership Triangle manifests differently across organisations. These variations shape the partnership dynamic and should be recognised when defining roles, responsibilities, and ways of working.

Business Partner Functions

- In some organisations, the remit of business partners extends to collaboration with legal, strategic operations, business operations, or operational excellence teams
- These adjacent functions often influence contracting, compliance, and performance management and therefore should be considered part of the extended partnership ecosystem

Procurement Partner Functions

- Procurement capabilities can vary widely. In large organisations, dedicated procurement teams with marketing or communications category specialists are common, and will also work in close connection with legal, finance and business operations teams
- Midsize companies may have general procurement covering multiple categories, including marketing, medical affairs, and communications
- Small biotech and early clinical-stage organisations often lack formal procurement structures, with marketing or finance leaders managing agency relationships, sometimes supported by independent procurement or agency management consultants

Agency Partner Functions

- Within agencies and consultancies, business and procurement partners may engage with a range of functions beyond client service - including finance, legal, operations, client partnership, and new business leads - particularly during selection, onboarding, and renewal phases
- Understanding who performs these roles within each partner organisation helps establish clarity, streamline decision-making, and maintain continuity across projects and geographies

The principles of commercial **governance, value management, and fairness** remain essential to sustaining effective collaboration, regardless of organisational structure, and structure alone does not guarantee partnership success. Effectiveness ultimately depends on shared behaviours and communication between all partners, as external pressures (from evolving market dynamics to internal organisational change) will test even the strongest frameworks and reveal where trust and alignment are most vulnerable.

These external and internal forces not only shape how partnerships operate but also expose shared challenges that affect all three partners, challenges explored in the next chapter.

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3

Overarching Challenges

What this chapter does:	Explores the key pressures, both internal and external, that test even the strongest of partnerships
What you'll take away:	An honest view of the shared challenges faced by business, procurement, and agency partners, and how these challenges can impact transparency, value and relationships

Chapter 3: Overarching Challenges

Continually Shape the Partnership

Organisational, technological, political, and societal change mean the healthcare industry continues to face intensifying external pressures that can strain even the best-intentioned partnerships:

- Accelerated or delayed product launch timelines
- Growth in content demands
- Cost containment expectations
- Digital transformation and AI integration imperatives
- Complex and evolving regulatory environments
- Shifting expectations among healthcare professionals and patients
- Organisational change driven by mergers, acquisitions, and cost-driven business transformation

The impact of organisational change can be immediate and severe, frequently disrupting established relationships, shifting decision-making authority, and altering how work is commissioned and evaluated. Changes in these dynamics can unsettle even mature partnerships and often lead to reduced continuity and increased turnover across all partners.

These forces affect every corner of the Partnership Triangle. When external pressure erodes trust, the resulting decline in confidence can show up in consistent ways:

- Legacy issues from past negative experiences
- Lack of transparency in objectives and constraints
- Withheld information and limited access to strategic discussions
- Internal mistrust between departments within organisations
- Increased staff turnover and loss of continuity across teams
- A tendency to focus on transactions rather than partnership value

The human cost of diminished trust extends beyond inefficiency. When collaboration breaks down, teams can spend more time managing friction and rework, reducing the focus and capacity needed to deliver timely, high-quality work that supports patients, healthcare professionals, and the organisations our industry serves.



Key Challenges by Stakeholder Group

The insights that follow are drawn from the HCA 2025 partnership forums and multi-stakeholder listening sessions, which brought together business, procurement, and agency partners across the healthcare communications community. Participants discussed the pressures shaping collaboration today and identified recurring pain points experienced across all corners of the Partnership Triangle. While the specific language may differ, common themes of trust, transparency, and shared accountability emerged consistently across all groups.

Specific Pressures Raised by:

Business Partners:

Balancing Quality and Cost

Business partners described the constant challenge of maintaining scientific and creative excellence within tightening budgets. Cost-containment pressures often necessitate difficult comparisons across agencies of different scales or capabilities, creating tension between budget constraints and quality expectations.

Process and Resource Pressures

A disconnect between internal processes and business priorities can create friction. Limited internal capacity to manage complex pitch processes and due diligence adds further strain, particularly in smaller organisations or at key time points.

Data and Capability Gaps

Limited access to, and sharing of, performance data and insights, both internally and with agency partners, can reduce agencies' ability to learn, optimise, and improve. Many business partners also expressed concern that traditional agency models are not evolving quickly enough to keep pace with changing commercial realities, especially in digital, omnichannel, and responsible AI. When entering new therapy areas, a lack of relevant disease expertise within incumbent agencies can lead to unnecessary re-pitching.

Evolving Skills and Experience

Resource constraints and organisational change often result in high turnover, with team members at varying experience levels managing increasingly sophisticated relationships, creating challenges with continuity and decision-making. With changes in personnel, expectations or agency partners can change in an instant. Without adequate training and mentoring, collaboration risks becoming transactional rather than strategic.

Procurement Partners:

Clarifying Roles and Responsibilities

Procurement partners frequently encounter ambiguity around ownership of agency selection, contracting, and relationship management. When boundaries are unclear, duplication or gaps in accountability can occur, creating frustration for all.

Reframing Value and Perception

Procurement partners continue to work against perceptions that they are primarily cost controllers rather than strategic enablers. Organisational mandates for strict process compliance can reinforce this perception, even when procurement teams are focused on value creation, innovation, and long-term partnership health.

Balancing Competing Priorities

Procurement partners are often assessed against financial and process metrics while also expected to support quality, innovation, supplier diversity, and sustainability goals. Simultaneously, business partners face equivalent pressures to deliver quality under constrained budgets. Balancing these objectives can be difficult when stakeholder expectations and timelines conflict.

Bridging Relationship Distance

Compared with business partners, procurement partners may have fewer day-to-day interactions with agencies. This distance can make it harder to assess partnership health, understand context, or capture opportunities for improvement, particularly if marketing services expertise is limited.

Building Category Expertise

The unique nature of marketing and healthcare communications can make generic sourcing frameworks feel misaligned. There is an opportunity to strengthen specialist knowledge to ensure processes remain proportionate, efficient, and supportive of creativity and compliance.



Agency Partners:

Brief Quality and Context

Agencies consistently identify incomplete or ambiguous briefs as a major barrier to effective work. Limited access to strategic insights and performance data can further constrain their ability to provide proactive, evidence-based recommendations.

Navigating Conflicting Expectations

Agency partners must often navigate the balance between procurement partners' need for process compliance and cost control, and business partners' drive for speed, flexibility, and creative quality. Managing these competing demands can lead to inefficiency and tension, particularly when timelines are compressed. Overservicing can quickly become an issue.

Evaluation and Process Pressures

Despite widespread acknowledgement of the importance of value and strategic partnership, cost continues to dominate evaluation criteria. Resource-intensive pitch and onboarding processes add to the strain, often with limited feedback and little continuity between opportunities.

Evolving Capability Demands

Agencies face constant pressure to expand expertise in digital, data, and AI, while maintaining excellence in core scientific and creative delivery. This needs to evolve, often without corresponding increases in time or resource, and contributes to workload intensity and fatigue.

Bringing the Perspectives Together

Each group faces unique pressures, from internal resource constraints to commercial compliance demands and capability expectations. However, all express a strikingly consistent need for greater transparency, shared objectives, and mutual respect.

The challenges outlined above are not symptoms of opposition, but signals of interdependence: when one corner of the Partnership Triangle is under pressure, the balance across the triangle shifts. Understanding curative principles and the necessary behavioural adjustments can help restore balance and enable partnerships to thrive.

The Partnership Assessment provides a shared diagnostic that helps teams move from opinion to evidence. By plotting KPI scores from each pillar, (**Transparency**, **Value**, and **Relationship**) on a simple radar chart, optimal results will show a clear triangle, and weaker areas can stand out quickly, creating a practical starting point for course-correction and a baseline for tracking change over time.

The next chapter distils the insights shared here into core guiding principles, shared behaviours that strengthen trust, transparency, and collaboration across the Partnership Triangle.

4

Guiding Principles for Effective Partnership

What this chapter does:

Translates lessons from research into clear behavioural principles

What you'll take away:

Seven foundational habits that anchor effective collaboration

Chapter 4: Guiding Principles for Effective Partnership

Partnership success depends on effective behaviours that continually strengthen trust, clarity, and collaboration. The following principles, drawn from the HCA's 2025 partnership forums and listening sessions, form the foundations for working together with purpose and respect. They are relevant to every stakeholder within the Partnership Triangle and designed to keep relationships balanced, transparent, and adaptable.

Defining the Partnership Triangle

Mutual Trust and Transparency

Trust is built through consistent openness, which involves sharing objectives, information, constraints, and feedback honestly. Transparency means honouring commitments, surfacing issues early, and avoiding surprises. When partners see the full context behind decisions, collaboration becomes more confident and constructive.

Shared Vision and Goals

Partnerships perform best when each partner aligns around a unifying purpose and measurable success criteria. In healthcare, that shared vision often centres on improving patient outcomes. Co-creating goals ensures that each party understands how its contribution supports the broader objectives and ensures a transparent discussion around measurement.

Early and Open Communication

Engagement should begin before briefs are finalised, and continue through regular, candid dialogue. Bringing all stakeholders together early prevents rework, accelerates alignment, and ensures that no party is left out of key conversations.

Role Clarity with Shared Accountability

A clear definition of responsibilities and decision rights prevents confusion, and shared accountability promotes joint ownership of outcomes. Processes and ways of working should be inclusive, fit for purpose, proportionate to the task, enable efficiency, and be respectful of the time and effort invested by all partners. Successes should be celebrated collectively, and challenges treated as shared learning.

Value Focus Over Cost Focus

Sustainable partnerships prioritise long-term value creation over short-term cost reduction. In times of financial pressure, shared accountability for improving cost efficiency is essential, but this differs from unilateral cost-cutting. True value includes quality, innovation, compliance, and patient impact - all of which underpin return on investment - but acknowledges that financial discipline remains a shared responsibility.





Continuous Learning and Agility

High-performing partnerships evolve as contexts change. Regular reviews, feedback loops, and openness to new ideas help teams adapt quickly and embed lessons from both successes and setbacks. An effective onboarding process for personnel changes (agency or client-side) is critical to maintaining continuity and partnership health. Agility protects partnership health and relevance.

Make Partnership Health Visible

Make progress visible through a shared Partnership Assessment. Teams can agree on a set of KPIs for each pillar (Transparency, Value, Relationship), revisit them at biannual partnership health checks through a Triangle Assessment, and use the radar chart and confidence sentiment to provide and index score and align on improvement priorities.

Respect and Empathy

Effective collaboration relies on recognising each partner's expertise and constraints. Courtesy, curiosity, and empathy maintain professionalism even under pressure and keep interactions human - the foundation of every strong partnership.

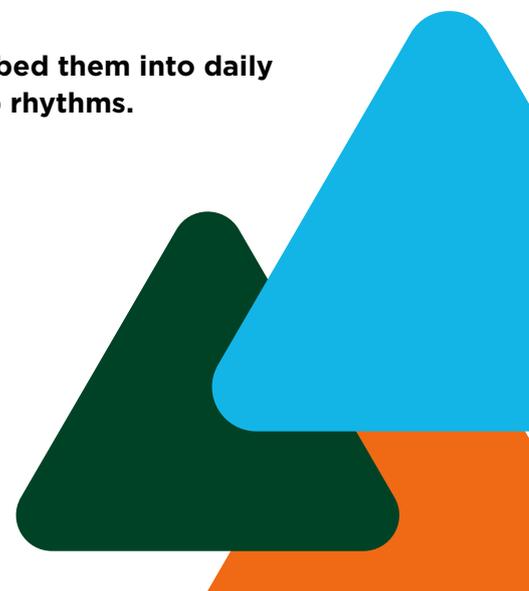
Implementation Considerations

For these principles to move from aspiration to action, they must be visible, reinforced, and applied consistently at all levels of seniority. Leaders should actively endorse and model partnership behaviours, ensuring that principles are embedded within everyday governance.

These principles should be reflected in partnership agreements, referenced in team meetings, and used as evaluation criteria when assessing partnership health. Recognition and reward systems can further reinforce the desired behaviours and signal that collaboration is valued as a driver of both performance and culture.

When trust, transparency, and shared accountability are embedded in day-to-day practice, partnership health becomes measurable and sustainable. Practical tools, strategies, and actions can translate these principles into consistent ways of working, from onboarding and co-creation to performance evaluation and renewal.

With these principles in place, the next chapter explores how to embed them into daily practice through collaborative processes and consistent partnership rhythms.



5

Collaboration Strategies and Best Practices

What this chapter does:

Shows how to apply behavioural principles in day-to-day working relationships

What you'll take away:

Practical collaboration methods that sustain partnership health

Chapter 5: Collaboration Strategies and Best Practices

Partnership success depends on translating shared principles into habits that strengthen trust, transparency, and shared accountability, thereby improving performance.

Partnerships are most effective when a collaborative spirit extends across every stage of the partnership lifecycle, from needs assessment and selection through activation, evolution, and renewal, and how partners engage from the start sets the tone for everything that follows.

The partnership journey often begins through a formal procurement or pitch process. These moments can establish mutual credibility, respect, and working culture long before a contract is signed. Good practice at this stage includes ensuring that processes are transparent, proportionate, and respectful of everyone's time and investment.

Embedding behaviours at the selection stage that align with the partnership values described in Chapter 4 (trust, fairness, clarity, and shared accountability) lays the foundation for effective activation and evolution within long-term collaboration.

Collaborative Selection and Onboarding

These principles support best practice across the five-stage partnership lifecycle described in Chapter 2, with different principles becoming more prominent at different stages.

Transparency and Fairness

All participating agencies should receive the same information, timelines, and evaluation criteria. Confidentiality and data-protection requirements must be clear and consistently upheld.

Respect for Investment

Pitch stages and deliverables should be proportionate to the opportunity. Timelines should allow realistic response times, and feedback should be provided constructively to all participants, regardless of outcome. Agencies should be transparent about the time and resources required to develop an appropriate response and participate meaningfully in the process.

Clear Communication and Governance

Maintain a single point of contact and establish clear communication protocols throughout the process. All three stakeholders of the Partnership Triangle should be represented in evaluation discussions and final decision-making.

Alignment on Values

Use early interactions to explore shared purpose, chemistry, and alignment with partnership principles, rather than focusing solely on technical capabilities or pricing.

Commitment to Onboarding

Ensure onboarding is adequately factored into timelines and provides agency partners with access to business strategy, relevant studies, and past campaign materials, alongside team introductions (including support functions) and ways of working.

Integrated Planning Approaches

Early Procurement Partner Engagement

Procurement partners should be involved in strategic planning, not just at the negotiation stage, to enable innovation and speed, not just adherence to process.

Joint Strategy Sessions

Bring all stakeholders together at the outset of major initiatives. Commercial and medical objectives, as well as key communications, should be shared and considered in the context of compliance requirements. Procurement partners should clarify commercial parameters, and agency partners should contribute strategic ideas and insights based on experience and expertise. This creates shared ownership from project inception.

Cross-functional Core Teams

Establish dedicated teams, including representatives from all three stakeholders within the Partnership Triangle, for significant initiatives or projects. These teams need to meet regularly, make collaborative decisions, and address/escalate issues together when required.



Collaborative Briefing and Scoping

Triangular Briefing Workshops

All partners benefit when briefing sessions bring together representatives from business, procurement and agency, allowing all parties to hear requirements firsthand and ask clarifying questions immediately.

Joint Scope Definition

Define deliverables, timelines, and success metrics during the briefing process. Budget ranges should be shared openly to help agency partners better understand the financial context in which they are developing recommendations.

Agile Scope Management

Embrace flexibility to adjust scope collaboratively as learnings emerge. Where changes affect deliverables, timelines, resourcing, or budget, apply a clear change-control process so impacts are transparent, approvals are aligned, and commercial implications are agreed before work proceeds.

Structured Engagement and Evaluation

Regular Partner Reviews

Schedule monthly or quarterly meetings that include all stakeholders to discuss project progress, partnership health, and emerging opportunities or concerns.

Transparent Key Performance Indicator (KPI) Tracking

Make performance metrics visible to all parties, reviewing them together to maintain shared accountability and enable early course-correction.

The outcomes of the Partnership Assessment can act as a shared scorecard for KPI tracking and review discussions. Partners score pillar KPIs (up to five per pillar), plot the radar chart, and use the combined view to agree on joint actions and owners.

360-Degree Evaluations

Implement formal, constructive performance reviews in which business, procurement and agency partners evaluate each other's performance and process effectiveness. Use findings to create joint improvement plans.

Capability Building and Knowledge Sharing Opportunities

Cross-Training Programmes

Organise sessions in which each partner educates others about its processes, constraints, and perspectives. This demystifies roles and builds mutual understanding.

Immersion Experiences

Arrange short-term secondments, "day in the life" exchanges, or on-site visits where business partners spend time in the agency environment and agency partners spend time in the business environment, to experience each other's working realities firsthand and build mutual understanding.

Joint Learning Initiatives

Attend industry conferences and training together, using shared experiences to spark internal dialogue about improvement opportunities.

Partnership Models and Ecosystem Collaboration

Aim to deepen the Partnership Triangle beyond project-by-project negotiations by establishing longer-term partnership models with agreed capacity, pricing approaches, and performance measures aligned to shared goals. These should involve input from all three stakeholder groups and remain flexible enough to include agencies of different sizes and specialisms wherever they bring unique value, with participation requirements and commercial structures kept proportionate to enable small, diverse, and independent agencies to contribute.

Practical Examples Include:

- **Innovation workshops:** Hold regular cross-partner sessions to surface shared challenges, align on priorities, and generate solutions together. Where relevant, rotate participation across the agency ecosystem to bring in specialist expertise and diverse perspectives.
- **Technology pilots:** Collaboratively test new tools and approaches in a way that builds shared capability and reflects the needs of all partners. Where possible, keep pilots open to cross-agency participation to encourage diversity of ideas and avoid over-reliance on a single agency partner or platform.
- **All-agency days:** If you work with multiple agencies, convene periodic sessions to align on shared goals, ways of working, and interdependencies, and to strengthen collaboration across the ecosystem rather than within single agency relationships.



Partnership Rhythm and Governance

Establishing the right cadence for collaboration is essential. Partnership teams should align early on key routines that maintain trust and allow for course-correcting issues before they escalate. The cadence should apply across all partnership phases, from selection through to renewal or transition, ensuring that governance and communication remain continuous and transparent (Table 1).

Phase	Meeting Type	Frequency	Purpose
Selection	Kick-off and due diligence	Once	Align expectations and evaluation lens
Activation	Alignment workshop	First 30 days	Define success, ways of working. Set Partnership Assessment criteria
Evolution	Joint review meeting	After 90 days	Review KPIs, surface improvements. Include Partnership Assessment review
All Phases	Collaboration health check	Biannually	Reflect on behaviours and partnership. Run a re-score of the Partnership Assessment
Renewal or Transition	Cautioning or escalation meeting	Once, when needed	Give early warning that the relationship is nearing a crossroads and agree on corrective actions or next steps
Renewal or Transition	Wrap-up and learning	Once	Close out well, capture learning, and provide final feedback on continuation or transition decisions

Table 1: Recommended partnership meeting rhythm by partnership phase, including all stakeholders in the Partnership Triangle

Making Rhythm Work in Practice

For governance to add value, meetings should focus as much on behaviours and context as on metrics and milestones: discuss what's working, what's not, and what each party can do to improve collaboration. Rotating facilitation or having different partners lead sections can also reinforce shared ownership.

Shared Documentation Best Practices:

- Use shared scopes of work with commentary space
- Maintain a Partnership Assessment and index score of joint performance tracking both delivery and relationship health
- Archive key meeting notes and decisions to avoid repetition or drift
- Capture and act on agreed behavioural commitments alongside KPI outcomes



Strategic Agency Partnership Management

Beyond the Pitch: Continuous Partnership Curation

Agency selection is not a “one and done” process. Successful business partners recognise that an effective agency ecosystem requires careful, intentional, and continuous curation to deliver optimal results.

Partnership strength depends on ongoing investment and learning, not episodic engagement, and this is a shared responsibility across all Partnership Triangle stakeholders. When done well, the approach is structured yet flexible, maintains alignment between business priorities and quality, and supports a fair, transparent distribution of opportunity across the agency ecosystem. For strategic partnerships, it is also helpful to agree senior sponsorship across both organisations and ensure those relationships are visible at key moments such as selection, activation, joint reviews, and renewal or escalation.

Key Principles of Portfolio Management

Strategic Balance

View agency partners not as individual suppliers but as part of a balanced ecosystem of complementary capabilities. Each agency partner should contribute specific expertise to overall effectiveness, with diversity of thinking and scale strengthening the collective outcome.

Regular Capability Assessment

Conduct annual or biannual reviews of agency partners' capabilities against current and emerging business partner needs, identifying both gaps and overlaps. Include all three stakeholder groups in these discussions to ensure perspectives on strategy, compliance, creativity, and commercial performance are considered equally.

Proactive Relationship Management

Schedule regular health checks, even with well-performing agencies, to maintain alignment and identify opportunities for improvement. Focus discussions not only on delivery metrics but also on behaviours, responsiveness, and innovation.

Thoughtful Evolution

Avoid disruptive overhauls where possible. Instead, make targeted adjustments that add new capabilities while maintaining stability in core relationships. Where significant change is unavoidable, for example due to restructuring or cost pressures, provide as much advance notice as possible, communicate transparently, plan for continuity, and ensure fair treatment for all partners involved.





Portfolio Management Activities

- Document what each agency partner delivers and how they complement other partners
- Compare performance against both market standards and partnership principles
- Regularly explore new agencies bringing fresh or specialist capabilities
- Adjust work allocation collaboratively based on performance, capacity, and strategic priorities
- Create opportunities for cross-agency learning and co-creation, encouraging collaboration rather than competition

The Role of External Advisors in Agency Partnership Management

Independent procurement consultants and agency management specialists can provide valuable support, particularly for business partners that lack dedicated procurement resources or in-depth category expertise. When used effectively, they bring objectivity and structure without replacing internal accountability.

External Advisors can help by:

- Bringing deep knowledge of agency landscapes and commercial models
- Offering neutral assessments of partnership health and performance
- Running reviews and transitions with professional expertise
- Providing benchmarking insights from across the industry
- Building internal capability over time

When Engaging External Advisors or Intermediaries, ensure they:

- Collaborate transparently with business and procurement partner teams and provide a clear rationale for recommendations
- Understand associated therapeutic areas and business context
- Balance procurement discipline with creative and strategic considerations
- Facilitate rather than dictate partnership change decisions
- Transfer knowledge to strengthen business and procurement partner capability over time
- Provide transparency about any existing relationships and actively manage conflicts of interest

The following chapter introduces practical tools and templates that make these collaborative habits repeatable and measurable across the partnership lifecycle.

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6

Practical Tools

What this chapter does:

Provides templates and frameworks to enable measurable and repeatable good partnership practice

What you'll take away:

Ready-to-use tools that embed consistency and trust

Chapter 6: Practical Tools

This chapter turns principles into practice, offering simple, adaptable tools that help partners plan, review, and evolve their partnerships effectively.

The following tools apply the partnership principles in everyday practice. They are flexible prompts that can be scaled up or down depending on the project. Each tool links to a specific phase of the partnership lifecycle, supporting consistent behaviours from first engagement through renewal.

Objective	When to Use	Supporting Tool	Outcome
Define and Align	Needs Assessment > Selection > Activation	Joint partnership charter	Shared purpose, behaviours, roles, and success criteria
Onboard and Enable	Activation > Evolution	Partnership Assessment	Smooth start-up, clarity of responsibilities, and early alignment. Partnership Assessment KPIs and Index set
Monitor and Maintain	Evolution > Renewal	Partnership health check: 360-degree review and self-assessment Partnership Assessment and Index	Continuous learning and improvement are tracked against the Partnership Assessment and Index.
Transition and Renew	Renewal > Transition	Agency transition plan	Continuity of knowledge, retained capability, and smooth handover

Joint Partnership Charter

The partnership charter is co-created by all partners to describe how they will collaborate, share accountability, and measure success.

It should capture the shared mission, the guiding principles and values that underpin the relationship, and the roles and responsibilities of each partner. The charter also outlines how teams will communicate, how decisions will be made, and the cadence of meetings and reviews. It includes mutual commitments, clear success metrics, and an agreed-upon evaluation approach for everyone involved.

Develop the charter collaboratively at project initiation and revisit it regularly as teams or objectives evolve. Refer to it in meetings to keep expectations aligned and use it as part of onboarding for new team members. The charter should serve as the anchor for behaviours of trust, respect, and transparency throughout the partnership.

Agency Onboarding Checklist

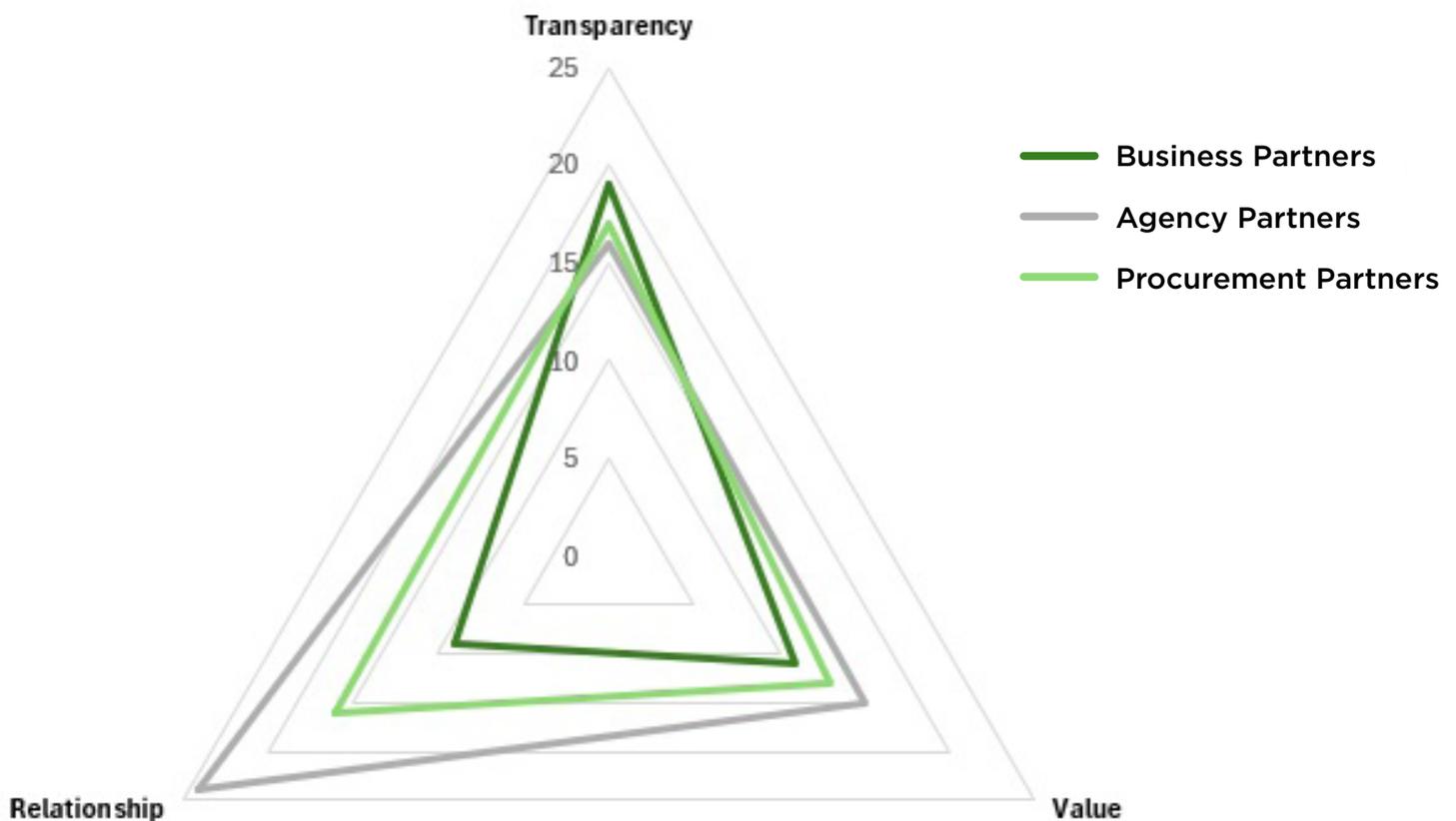
A structured onboarding plan helps new agency partners integrate smoothly and sets the tone for how collaboration will work in practice. Before the start date, confirm all contracts, confidentiality and data-privacy agreements, and third-party risk assessments. Ensure system access, compliance training, and purchase orders are complete so that the partnership can begin working without delay.

The goal is not bureaucracy, but confidence, providing everyone with the context, clarity, and resources they need to perform effectively from Day 1.

Monitoring and Maintaining Partnership Health

Regular health checks help ensure that partnerships stay healthy, balanced, and aligned with evolving business needs. These reviews assess both what has been delivered and how collaboration is working in practice.

A short, structured review at least twice a year (see Table 1) allows partners to evaluate progress against agreed success metrics, quality standards, and compliance requirements while also reflecting on trust, transparency, and responsiveness. Some partnerships also use shorter check-ins between health checks. Each review should encourage open conversation rather than formal reporting.



Partnership Index: Triangle Assessment and Index Scoring

The Partnership Triangle Assessment and Index can provide a consistent format for these reviews. The Triangle Assessment is designed to stay strategic, focusing on how the partnership drives business impact, efficiency, and trust, rather than on day-to-day operational details.

- Under each Pillar **Transparency, Value, and Relationship**, co-create or refresh KPIs (often up to five per pillar) and agree how each will be scored
- Score and total each pillar, then plot **Transparency, Value, and Relationship** on a simple radar chart to make the 'triangle' shape visible
- Add a confidence sentiment ("gut feel") rating from each partner (1-5) and calculate an overall index (commonly 60% KPI scores, 40% confidence sentiment)
- Agree on improvement actions with named owners and check progress at the next governance conversation

The outputs can help partnerships document and track:

- Improvements in efficiency and project delivery
- Enhanced relationship scores and trust levels across stakeholders
- Examples of agency value-add and innovation being adopted
- Evidence that structured governance prevents issues from escalating

The assessment and index are guides for human interaction, not a substitute, and should be used to support constructive dialogue and shared accountability.

One helpful prompt is the **See - Own - Do** approach:

See what is working or where pressure points are emerging, **Own** individual and collective contributions to outcomes, and **Do** what is needed to strengthen alignment.

The aim is always to improve partnership health, not to audit. Keep the discussion focused on a few meaningful actions that strengthen the relationship capability, efficiency, and ways of working. Revisit progress in the next review conversation to maintain momentum.

Recognition is a vital part of partnership health. Celebrate examples of effective collaboration and weave partnership objectives into performance reviews. Partnership senior leaders can reinforce this culture by acknowledging joint achievements, modelling transparency when issues arise, and treating challenges as opportunities to learn together.

When applied consistently, this rhythm of measurement, reflection, and recognition turns partnership governance into a continuous driver of trust, efficiency, and shared success across the lifecycle.

Agency Transition Plan

Transitions between agencies or projects can be sensitive and complex. A clear plan protects continuity and captures learning for future partnerships. It should define timelines and responsibilities for handovers, with an overlap period to ensure knowledge transfer. Documentation of ongoing projects, asset transfer protocols, and lessons learned should be part of this process.

Risk management is also essential for identifying critical dependencies early, agreeing on contingency plans, and establishing escalation paths for any issues that arise. Closure steps, such as final invoices, intellectual property transfer, and contract termination, should be managed transparently.

Handled carefully, transitions demonstrate respect, professionalism, and shared responsibility for maintaining quality and integrity.

Making Tools Work

Tools are most valuable when they create dialogue rather than paperwork. Use them as prompts for discussion in governance meetings, planning workshops, or reviews. Keep the focus on trust, clarity, and continuous learning, which are the qualities that sustain strong, long-term partnerships.

The next chapter summarises how each partnership group can put these ideas into immediate action.





7

A Call to Action

What this chapter does:

Turns principles into behaviours, and outlines what each partner can do right now and over time

What you'll take away:

Clear, immediate, and sustained actions for business, procurement, and agency partners to strengthen collaboration across the triangle

Chapter 7: A Call to Action

The success of the Partnership Triangle depends on everyday actions. The principles, tools, and behaviours outlined in this playbook will only make a difference when they are applied consistently by each group.

The following commitments highlight how business, procurement, and agency partners can bring partnership principles to life, starting now and building for the long term.

Make Partnership Health Visible

Agree on a small set of KPIs per pillar (Transparency, Value, Relationship) and capture a baseline Partnership Index score at a point in time

- Use the Partnership Assessment and Index as a core input to the biannual partnership health check, and refer to it in other review meetings if helpful
- Track trends and capture learnings, so improvement becomes repeatable across the partnership ecosystem

For Business Partners

Immediate Actions

- Share strategic context openly with both procurement and agency partners, so everyone understands objectives and constraints
- Provide clear, comprehensive briefs with defined success criteria, and give timely, consolidated feedback on work
- Celebrate joint successes publicly, acknowledging every partner's contribution to outcomes

Sustained Actions

Involve agency partners early in the planning process and engage procurement partners as strategic enablers, rather than late-stage negotiators. Invest time in understanding partner perspectives through regular reviews and shared learning. Model transparency and accountability in day-to-day collaboration to strengthen trust across the lifecycle.



CALL TO ACTION



For Procurement Partners

Immediate Actions

- Participate in creative and strategic discussions to enable procurement to support quality and innovation
- Share relevant market insights with business teams to inform fair, evidence-based decisions
- Recognise good agency performance directly, reinforcing a culture of respect and partnership

Sustained Actions

Deepen category expertise in marketing and communications so that processes remain proportionate and supportive of creativity. Develop evaluation criteria that balance cost, quality, innovation, and diversity to reflect the full value of partnership. Champion value-based metrics and long-term performance frameworks that reward collaboration and sustained impact.

For Agency Partners

Immediate Actions

- Demonstrate proactive partnership behaviours: offer solutions, surface risks early, and communicate openly
- Be transparent about resource needs and constraints to support realistic planning
- Use data and case studies to evidence the value and impact of your work

Sustained Actions

Continue to evolve capabilities in digital, data, and emerging areas while maintaining excellence in core delivery. Build strong connections across the Partnership Triangle by using tools and health-check rhythms to stay aligned. Act as a true stakeholder in brand and patient outcomes, not just a service provider.

Whether you are a business, procurement, or agency partner, these immediate and sustained actions are the collective foundations that turn principles into practice. They are immediate and enduring steps that, taken consistently, strengthen trust and ensure partnership excellence endures over time.

The next chapter looks ahead to what this shared commitment can achieve for our industry, as we move forward together.

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8

Moving Forward Together

What this chapter does:

Brings the journey full circle, reinforcing commitment, shared accountability, and optimism for the future

What you'll take away:

A unifying call for trust, transparency, and partnership excellence, together achieving what no one partner can alone

Chapter 8: Moving Forward Together

The healthcare landscape will continue to evolve rapidly, presenting new challenges and opportunities. Yet the fundamental need for effective partnerships remains. By implementing the principles, strategies, and tools outlined in this playbook, organisations can transform their Partnership Triangles into engines of innovation and value creation.

Success depends on commitment from all partners to move beyond traditional vendor-client dynamics and embrace genuine collaboration. That means daily investment in trust, consistent transparency, and shared accountability for outcomes, ensuring all partners can deliver maximum value as business needs evolve.

Make partnership measurement part of this commitment. Re-running the Partnership Assessment over time creates shared visibility of progress and provides a constructive prompt to address issues early, before trust or performance erodes.

The inflexion point facing our industry can become a turning point for positive change, but only if we act together and treat every conversation, briefing, and review as an opportunity to demonstrate openness, respect, and shared purpose. When all three corners of the Partnership Triangle consistently apply these behaviours, trust becomes the default, collaboration becomes easier, and success follows naturally.

Start with one small step tomorrow. Build from there. The strength of the Partnership Triangle depends on each of us fulfilling our part while supporting others in theirs.

The rewards justify the effort: more effective communications, stronger business results, and ultimately, improved outcomes for patients and healthcare communities. Together, we can create partnerships that deliver excellence none of us could achieve alone.



About the Partnership Triangle Playbook

This is a living document and represents the collective wisdom of business, procurement and agency partners across the healthcare communications industry.

As our industry continues to develop new ways of working, so will the Partnership Triangle and this playbook, reflecting new insights, innovations, and collective learning.

We welcome feedback and suggestions for future editions.



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