



**Free Agent
Ecosystem™**

FreeAgentEcosystem.com

Presented by

Joe Sterling & Karen Dietz

IMC 2003 National Confab

Presentation Overview

How much will we improve our professional and personal lives by mastering collaboration and understanding nature?

Historically we've tried to master nature while not understanding human collaboration. In the Free Agent Ecosystem we're discovering that by emulating nature we are collaborating more effectively. Use the materials and experiences from our presentation to discover how much you can improve your collaborations with other professional services free agents. There's no telling what the side effects will be! You could change your world, one collaboration at a time.

The FAE originated with a small group of business consultants in San Diego, CA who were looking for ways to collaborate more effectively for the purpose of generating more business, learning with like minded professionals, and having more fun doing what they loved.

Free agents are growing in America due to the changing aspects of the economy, raised consciousness, and a new perspective on work-life. It is estimated that approximately 30% of Americans are now working as free agents. It is expected that that trend will continue (source: Free Agent Nation by Daniel H. Pink). As a free agent already, you most likely have discovered that navigating this world of free agency in the new economy can be a challenge.

One of the challenges of being a free agent is not having all of the skills that a client needs, particularly since clients are realizing that they are living in a complex system and need to address many aspects of the system, not just one. Free agents are discovering that they need to collaborate with other free agents to meet the client's needs. Collaboration brings its own set of challenges.

The Free Agent Ecosystem is intended to help individuals embrace a way of thinking and operating that will help them find appropriate collaborators and know how to collaborate in a win-win-win way (win for the free agent, win for their fellow free agent, and win for the client). We are very excited to see the emergence of a new way of connecting and finding ways to collaborate to better serve clients that is different than the classic club or professional organization.

We have several hopes for the Free Agent Ecosystem, such as:

- FAE Users will explore new ways of collaborating that will further the art of collaboration
- FAE Users will expand their capacity for being proactive in creating their life they way they want it vs. waiting for others to do it for them
- FAE Users will find more meaningful work through the connections they make in the Free Agent Ecosystem
- FAE Users will discover more about themselves and move further along their path toward self-actualization as they push through their barriers regarding agreement making and accepting abundance and prosperity in their life
- FAE Users will have a forum for connecting at a deep level by dealing with the real life issues of finding meaningful work and developing healthy relationships through collaboration
- Together we will change the social order of humankind by pioneering a new way of working and collaborating, by taking the work relationship to its highest form yet
- May you all prosper beyond what you thought possible!

Key Points

Key points that will be covered during the presentation are:

- ***Value chain of professional services***
- ***Simple rules for collaboration***
- ***Agreements***
- ***Handling intellectual property***

Learning activities will be a combination of hands-on experiences and discussions.

This workshop is intended for all consultants who desire better peer relationships and greater ease with clients.

Outline

1. Introduction

- How we came to create the Free Agent Ecosystem
- Why focusing on creating successful collaborations is important today.

2. The elements that constitute winning collaborations.

- Experiences with successes and failures.
- What are the few simple rules that guide successful collaborations?
- What's the value chain for professional services?
- What is each section of the value chain worth?
- Articulating roles in collaborations.
- What kinds of agreements do you need, if any, to guide collaborations?
- How do you begin to deal with intellectual property?

3. Going forward – insights and possibilities.

Learning Objectives

1. Recognize the critical and mysterious differences between collaborations that succeed and those that fail through sharing stories.
2. Analyze the five-step chain of selling and delivering services, where you like to play, and the compensation parameters for each section.
3. Decide how to shape your collaborations based on seven simple rules.
4. Select professionals you'd like to collaborate with based on your particular needs and style.
5. Articulate the agreements and documents that work for successful peer-to-peer collaborations.



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Commitment

FAE Users commit themselves to applying a set of ethical guidelines that promote win-win-win outcomes for clients, consultants, and collaborators. Everyone's ease and prosperity is increased.

FAE Users work with agreement templates that structure service delivery, confidentiality and intellectual property transactions clearly and fairly.

Conscience



Contribution

Many FAE Users have multi-year relationships. Collectively they enjoy an increased capacity for making a difference in the world.

An FAE is a new form of organization and an old form of culture. An FAE makes consultants and clients more successful. This builds commitment among FAE Users to growing a robust community.

Continuity

Collaboration

FAE Users collaborate on lead generation, sales and contracting, service delivery, customer follow-up and intellectual property.

FAE Users end up serving more and larger clients without the overhead of big consulting firms. Speed and flexibility is increased. Just the right talent is brought to each project.

Capability

"We can do together what none of us can do individually"

"I've changed the way I think about collaboration. With the FAE tools I can create win-win-win work relationships."



Why the FAE matters to Clients

Collaboration among free agents turns out to be a better value for clients than competing with each other or big consulting firms. Why?

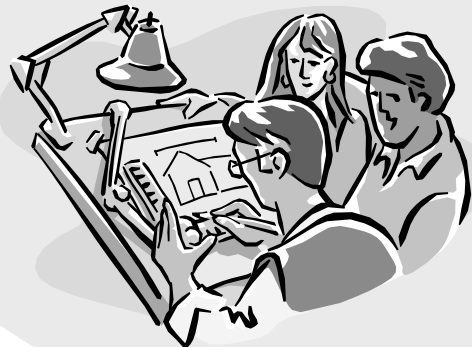


FAE Sub Contractors deliver services in their areas of greatest skill and let others deliver in disciplines where they are weak. Because there is enough to go around they are more likely to share.

COST SAVINGS "Just in time talent" means FAE Prime Contractors don't carry overhead costs that get passed on to the client

SEASONED TALENT FAE Agents have to endure a market of their own making before being selected for client projects which means Clients won't get any fresh graduates learning to be consultants on the client's dime.

COLLABORATION The relationships between FAE consultants are made strong before they get to the client's door. FAE Users will be serving the client not competing for his or her attention.



"It's a waste of money if consultants compete vs. collaborate at my firm."

FAE Prime Contractor's overhead is minimized translating into lower overall engagement costs to the client

Why the FAE matters to Consultants

Some people are great schmoozers! Some like to make deals. Some create knowledge, and others like to deliver it. Some are great at finding out how it all went. Give people a chance to do what they do best and hand off the rest.

GENERATE MORE REVENUE

As an FAE User you've got more ways to generate money: referral fees, being a prime contractor or a subcontractor, doing quality assurance and follow-up, and generating intellectual property. FAE guidelines give you a way to negotiate fees with colleagues faster, easier, and more clearly.

DO WHAT YOU LOVE

As an FAE User you've got ways to refer work and elements of contracting you don't want to others and ways to get help for work you can't do. By collaborating with others who love the parts of the your business you hate, you'll spend more time doing what you love.

COLLABORATE vs. COMPETE

FAE Users report great relief when they discover that they don't need to compete against one another for business. There is an emotional and physical toll from the anxious life of competition. The FAE helps diminish this by building collaborative relationships. Bottom line? It's more fun and more profitable.



"I can do so much more knowing that my colleagues are backing me up."

***Why do some
collaborations give us
energy and others
give us heartburn?***

***"We can
accomplish
anything if we
are willing to
share the
credit"***

A Few Simple Rules for Professional Services Free Agents

Our hypothesis is that a sustainable commercial ecosystem among professional services free agents will emerge if they agree to operate by a few simple rules and self-organize in service to clients. So far, this has proven to be the case. More work is being contracted and delivered faster and easier.

***Do the right thing.
Choose win-win-win outcomes***

Show up and add value

Honor the Prime, the Sub, and the Client

Manage and share your knowledge

Honor your own identity

Reward Sales Behavior

Reveal the network to the client

There is only so much that a written agreement can do. The rest is a matter of ethics. This system of Simple Rules forms a core around which collaborators can dialogue to create their own ground rules. Embedded in this set is the DNA of a self-organizing marketplace.

Reward those who discover opportunities to serve clients. It adds value and increases everyone's prosperity.

"Intangibles are the foundation of the new economy"

Professional Services Value Chain

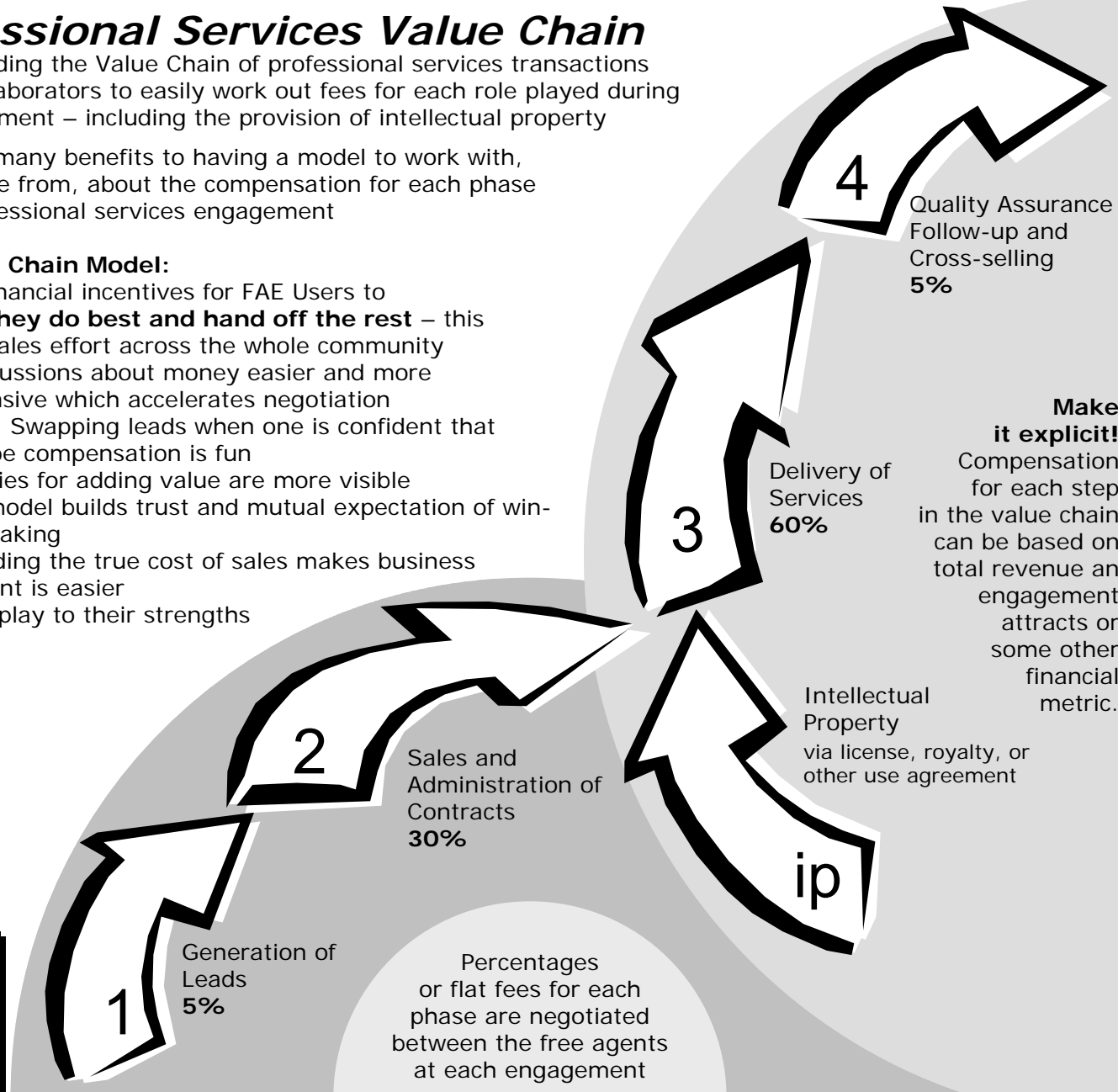
Understanding the Value Chain of professional services transactions allows collaborators to easily work out fees for each role played during an engagement – including the provision of intellectual property

There are many benefits to having a model to work with, and diverge from, about the compensation for each phase of the professional services engagement

The Value Chain Model:

- Provides financial incentives for FAE Users to **do what they do best and hand off the rest** – this amplifies sales effort across the whole community
- Makes discussions about money easier and more comprehensive which accelerates negotiation
- Is exciting! Swapping leads when one is confident that there will be compensation is fun
- Opportunities for adding value are more visible
- A shared model builds trust and mutual expectation of win-win deal making
- Understanding the true cost of sales makes business development is easier
- FAE Users play to their strengths

“Abundance is a function of valuing what we already do and have.”



Take the Free Agent Ecosystem Challenge

Are YOU ready for the FAE?

Do you want to achieve more and or larger client engagements?

Do you want your referral network to recognize your success in collaborations?

Are you looking for a win-win-win work life?

We are looking for consultants who are:

Seasoned professionals

Willing to learn from each other, collaborate, share fees and leads

Committed to creating ethical relationships

Motivated and interested in experimenting with others to build abundance

Open and able to talk about referral fees, fee sharing and contracts

We are looking for clients who:

Are committed to getting better value from consultants

Want to improve collaboration by creating more "wins" in their organization

Are willing to work with a resource that is more flexible and affordable than traditional consulting firms

Want more speed and ease from consulting resources

If you answered yes to any of these questions

ask an FAE User to help you get involved.

Visit FreeAgentEcosystem.com today to read the

FAE Manifesto and bibliography.

Bio – Joe Sterling

Joseph B. Sterling

Joseph B. Sterling is the founder of Sterling Insights, Inc. which deploys a national network of facilitators, designers, and organizational development experts to facilitate vision, insight and transformation for individuals, teams and organizations. Clients like IBM, Toyota, Nissan, Credit Suisse First Boston, and Silicon Graphics all rave about Sterling Insights ability to help them achieve breakthrough results.

Sterling Insights is headquartered in Alpine, CA on a 13 acre site with a 3000 square foot facility designed and outfitted to accelerate group collaboration, creativity, and speed.

Joe's approach to facilitation and strategic planning is a synthesis of many disciplines, including scenario development, accelerated learning, continuous improvement, complexity and collaborative strategic modeling. His formal education includes a B.A. in Humanistic Psychology. He has been a contributor in the IBM Institute for Business Value since 2000 and worked extensively with the E&Y Center for Business Innovation from 1997 through 2000.

In addition to group facilitation, Joe has a special ability to visually synthesize group dialogues, as they happen, into lively and evocative images that amplify participant engagement, understanding, and inquiry. This skill has been utilized by leaders of business, government and military organizations.



Inspired by:

Bill Mollison, Christopher Alexander & Bucky Fuller

Informed by:

Google.com News, client Think Tanks, Wired, HBR

Challenged by:

Pests in my garden and presumption in my thinking

Lives by:

"The universe enriches those who strive every day to be of greatest possible love and utility."



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Bio – Karen Dietz

Karen Dietz, Ph.D.

Karen Dietz, Ph.D. is the owner of Polaris Associates LLC, a San Diego, CA based company where she is an expert in building the power and presence of companies through the process of storytelling. Karen works with select clients who want to propel their leadership, organizational effectiveness and communication to a higher level. Her work allows organizations to maximize the effectiveness of their product or project launches while reducing resistance and cycle times. Through her coaching, workshops and consulting, Karen emphasizes building skills in storytelling as a critical competence in leadership development, culture change, strategic planning, change management and branding.

For the past 17 years, Karen has applied her rich cross training to help people and organizations leverage and improve their internal and external strengths. She is a story expert, folklorist, management consultant, executive coach and professional speaker. The particular process she employs is derived from her expertise in the rigorous and diverse fields of folklore, creativity, strategy, organizational development, high performing teams, storytelling and interpersonal communications. Clients include Walt Disney Imagineering, Chase Manhattan Bank, the New York & American Stock Exchanges, Avery Dennison and Toyota.



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Inspired by:

Christopher Alexander, Robert Plant Armstrong, Michel Foucault, James Deetz, Robert Pirsig

Informed by:

NPR, Gurteen Knowledge-letter, various listserves

Challenged by:

Aging parents, crazy schedules, building a deck and private garden.

Lives by:

"Those who do not have power over the story that dominates their lives, -- the power to retell it, rethink it, deconstruct it, joke about it, and change it as times change, -- truly are powerless, because they cannot think new thoughts." Salman Rushdie



"Reciprocity is the true currency of community."