



Alliance Potential

Becoming the target of choice in big pharma's portfolio

Being chosen as a partner by big pharma is an accomplishment. Yet it doesn't ensure alliance success, nor does simply having great science. In this paper, Oaklin's Nick Palmer describes **the key behaviours needed to ensure your partnership goes the distance.**

NICK PALMER · OAKLIN

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CONSULTANTS 2026

Chemicals & Pharmaceuticals

INTRODUCTION

For decades, alliances have been a wellspring of innovation in the pharmaceutical and healthcare industries. Patients and their families benefit from new lifesaving treatments. Large pharmaceutical companies drive profitability and growth. Entrepreneurs and investors in biotech “do well by doing good”.

The essence of a successful alliance is “I have something you need and cannot replicate, and you have something I need and cannot replicate.” These may include assets, market access, brand, intellectual property and tacit knowledge.

Money, at least only money, is rarely the unique ‘something’ a firm brings to an alliance. Money is available through loans, equity and other means without the costs and complexity of an alliance. While a larger firm may bring resources or ‘deep pockets’ along with its other capabilities, it is those other capabilities that turn the relationship from a transaction into an alliance.

Small and mid-sized biotech firms frequently rely on larger pharmaceutical companies for critical capabilities necessary for drug development, approval, marketing and distribution. In most cases the smaller firm brings something very specific, unique and of extremely high ‘quality’, while the pharmaceutical company brings its full suite of capabilities and assets.

Our four-year **Target of Choice** research focuses on what happens after a deal is done: the two companies are now in an alliance. Success depends both on the quality of the science and on how well the partners coordinate their efforts. Each needs the other. Contributions are difficult to measure or monitor. Effort is difficult to track. Enthusiasm is even tougher.

Finding themselves in an alliance, what can the leaders and managers of the *smaller* firm do to increase the likelihood that their particular collaboration will succeed? Obviously, the behaviour of the larger firm will have a significant impact. But that is out of their direct control.

So, what should a small or mid-sized biotech do to increase the likelihood of success in its alliances with large pharmaceutical companies?

This paper presents our advice to leaders of those firms on how, in a crowded, dynamic field, to remain a high priority to their larger partners. First, the attitudes that differentiate the consistent winners. These are less rules than leanings that underpin success. Second, a few actions that can work if used selectively. Yet these actions have downsides, both short and long term. You must carefully consider risk–reward trade-offs. Finally, a basic homework assignment that too many smaller firms fail to keep up to date and detailed. This deprives them of important context for decision-making and action.

We use the cutting-edge I-SAMM™ framework to organise and explain our advice. The panel below provides a very brief overview of I-SAMM™ to give readers a sufficient understanding. For further information, contact the author at Oaklin.¹

FRAMEWORK

What is I-SAMM™?

I-SAMM™ – the Integrated System of Alliance Management Models – systematises alliance management as one operational system, not a set of disparate tools. Its five models track how a decision moves from the boardroom to the field. Senior management sets the destination (Purpose-Destination-Plan, or PDP). General management takes that direction and identifies risks that could threaten getting there (the Three-Risk Model, or TRM). The alliance manager translates those risks into the specific moments where they could occur – and owns what happens next.

Because each step traces back to the one before it, senior management can trust that day-to-day trade-offs still serve corporate priorities, not just local ones. This paper draws mainly on the next two: Value Inflection Points (VIP) and the Obelisk and Shadow Model (OSM).

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THE FOUNDATION

Reality: it's a discipline

Alliance management is not glorified project management

Collaborative ideals – trust, alignment, win-win, 1+1=3 – are all nice. They're true, in part. They also gloss over real difficulties: high-stakes endeavours between multiple parties with differing, changing interests and priorities. Human endeavours subject to human foibles.

Alliance management is a discipline in its own right. It complements project management: project management deals with the 'engineering' side, while alliance management addresses the human side. It is distinctly not just the soft stuff. Its essence lies in business success.

Unlike projects, alliances often continue for long periods encompassing many smaller phases. An early-phase pharma/biotech alliance may pass through Discovery, Pre-Clinical, Clinical Trials, Commercialisation, Scale-Up and eventual Wind-Down phases. This could last decades. Simply, a project is an 'event', while an alliance is an 'ongoing process'. Partners must have an eye both to the shorter term and to the long-term relationship. At many points partners must explicitly and implicitly recommit to the alliance.

The research reveals four attitudes or biases to guide interactions with your big-company partner. You can use them to test your decisions and to temper your reactions in high-stress situations. They are not rules. These are particularly important when working with a new partner where you do not yet

have well-tested relationships and experiences.

Nor are they feelings or emotions, which are often beyond people's control. A commonly cited example in alliances is 'trust' – supposedly critical to success. Yet real trust is an extremely complex attitude, shaped over time in response to experiences. It is unrealistic, and unwise, to suggest that you should trust your alliance partner prior to any experience working together.

THE OVERARCHING THEME

Humble Pride. Holding these attitudes together is an overarching theme. It is important for smaller-firm executives to remember: if you have an alliance with big pharma, you've already succeeded. Few firms reach that position. Confidence in your firm combined with an eagerness to collaborate with your partner should guide your approach.

A cynic might find the attitudes that follow subservient or Pollyannaish. We disagree. Taken as rules, they might be. But taken as attitudes they are the proven path to successful alliances with large companies. Temper each with good judgement. Learn as the alliance progresses.

The four core attitudes

Proper attitudes, shared across your firm, set a tone for and guide day-to-day alliance choices. The four core attitudes of successful Targets of Choice are:

01

Expect Excellence

You have committed to this partner
– trust your decision.

02

Learn Less

Learning is good; achieving alliance
objectives is better.

03

Do it Their Way

Identify what needs to change;
ignore the unimportant.

04

Stay Upbeat

There will be setbacks and conflicts
– keep the energy positive.

1. Expect Excellence

You have committed to this partner – trust your decision



Each party expects the others to deliver on time, on spec and reliably. In this environment progress can be rapid and clear. Work is efficient.

In most cases, the larger firm's contribution is more broad-based, while the smaller partner brings a few very specific, unique assets and capabilities.

This appears obvious. Of course you expect excellence. But do you behave as if you do?

Frequently, alliance participants – both large and small – second-guess their partners just to be safe. They add extra checks. They duplicate analyses. This seems only prudent. Yet it adds cost and creates delays. It betrays an attitude of wariness antithetical to high-performance collaboration.

The great promise of most alliances is “bringing together the best of two top-notch organisations” to achieve something uniquely better. Each partner brings something to the alliance – its own capabilities, IP and people. At their best, alliances smoothly harness this potential.

At their worst, mistrust and conflicts, duplicated effort and poor coordination sap such collaborations of much of that potential. Most alliance experts cite ‘trust’ as critical to success. But what is trust, and how should it be manifested in an alliance?

In well-running alliances, each partner does what it does best. In an Olympic relay, the receiving runner cannot afford to look back to ‘check’ that a baton pass is clean. They trust that their partner will place the baton precisely in their hand. The handing-off runner does the sole visual check.

Weakened trust between small and large partners is endemic. Minor disagreements escalate as work proceeds. Small partners, once burned, second-guess larger partners, not trusting them to meet commitments. Larger partners concerned about the rigour of a smaller firm's approach become defensive and over-monitor. While the smaller firm's executives worry about cash flow, the larger firm's leaders worry about the impact of a problem on their brand and reputation. The risks each perceives are different, and significant.

Partners do let things slip: deadlines, quality, other commitments. Nevertheless, our Target of Choice research indicated that small companies that manage their work and relationship expecting their larger partner to deliver excellence find alliances more efficient and effective. While this can lead to some setbacks, most believe the overall impact to be positive. Trust and verify.

An important part of Expect Excellence is to develop and track a detailed understanding of the collaborative work. Discuss the questions below openly with your partner as early as possible. Share war stories – both the bad and the good.

Questions to discuss with your partner

- 01 What are the two or three big items you need from your larger partner?
- 02 How do you define quality in these areas? Timeliness? Responsiveness?
- 03 How can you monitor progress without excessive cost or intrusion?
- 04 What are your fallback options if the partner fails to deliver as promised?

The Four Ds

To adopt Expect Excellence, step back a letter and consider the Four Ds:

D1

Draw a picture

Diagram the alliance Operating Model in detail. Do this with your partner. You'll need more than a simple process map. Be creative.

D2

Detail expectations

It's hard to expect excellence if you haven't agreed what you are expecting. Extend your governance to a finer level of detail: who does what, and how you will judge quality, timeliness and adherence to standards.

D3

Discuss concerns early

Raise them before they become problems. Your alliance manager should build communication channels that allow frank discussion of concerns.

D4

Deliver excellence yourself

Live up to your own high standards. If your firm is coming up short, bring the situation to your partner's notice with proposed solutions.

In discussing this finding, some have objected, citing failures on their larger partner's part. We get it. May we suggest some perspective?

First, it's unlikely that your own firm has performed perfectly. It's a challenging programme and things rarely go to plan. Second, be careful not to attribute a larger partner's failure to some Machiavellian motive. Psychologists call this a 'cognitive distortion'. Often a mistake or shortcoming is no more than human error. Once you attribute a problem to a dark motive, your entire alliance relationship sours. Finally, if a partner is consistently slipping, put in place the least disruptive contingency plans to compensate – explicitly and together. You want to succeed. Design your plans to do so efficiently. Longer term, factor in a company's history with you and its reputation with other firms when choosing an alliance partner.

2. Learn Less

Learning is good; achieving alliance objectives is better



Most alliance announcements and launch meetings call out learning as a key objective. Particularly for the smaller firm, learning from the larger partner can be a high priority. Each partner brings unique abilities. Larger firms generally have an excellent command of the entire drug-development-and-marketing business system. Smaller firms looking to grow see great benefits from learning.

Yet the principal objective in most alliances is technical and market success. This requires focus and efficient management. Unnecessary delays threaten this aim. Time is perhaps the most undervalued contribution in an alliance – both key individuals' time and project time.

Real learning requires time, too. Focused time. While all projects create a healthy amount of learning by doing, this learning is not free. Too many executives see learning as something that 'just happens'. This view of learning as magic is naïve.

Smart Targets of Choice drive towards alliance objectives while optimising other benefits, such as learning. They can work with their partners to create a learning plan by discussing questions like the following.

Building a learning plan with your partner

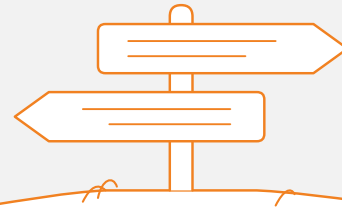
- 01 What, specifically, are we looking to learn?
- 02 How can we structure our approach to make that happen? What can each partner do to streamline learning?
- 03 How will we track or monitor learning? What trade-offs – time, money and so on – might we make to facilitate learning?

Such discussions can unearth creative ideas that both accelerate progress and improve learning. One small biotech with several new employees agreed to assign those people to work as assistants in its larger partner's facilities, breaking a staffing bottleneck there and training them in the process.

Once you have a plan – ideally specified in the alliance agreement, but at a minimum discussed and agreed with your partner – manage people and time to facilitate that learning. What isn't measured won't happen.

3. Do it Their Way

Identify what needs to change; ignore the unimportant



Each partner brings its own approach and expectations to the work. These are rarely the same. Successful companies develop their own approach and even vocabulary. From inside your company, it can be easy to feel that yours is THE way. In fact, much is nuance, and even some larger details vary across successful firms. Simply saying “we’ll just adopt best practice” is a sure recipe for conflict.

Many large/small alliances aim to accelerate the development process by capitalising on the smaller firm’s unique approach or technology. In theory, great. Making it happen takes a good deal of work coordinating and reconciling processes across the companies.

Research suggests that as many developments are actually slowed by partnerships as are accelerated.

Partners ought to discuss and agree on process issues. Up front. While it may feel grating, smaller firms should lean towards using the larger firm’s processes except where it’s critical to alliance success. Delays and conflicts trying to reconcile less critical aspects create needless friction.

Large firms typically have well-established end-to-end processes. Many have invested significant effort creating alliance-management processes and structures. In large-small alliances it often behoves the smaller partner to take advantage of the larger firm’s business and alliance-management processes. At times, the smaller firm bringing a new technology comes equipped with a novel approach to elements of the development process. That’s where the work begins.

The Operating Model

The most useful concept for understanding, evaluating and designing consistent, high-performance alliance processes is the Operating Model. The Operating Model is a framework to describe how the various elements of the alliance will operate. More than just a catalogue of elements, the Model describes how the elements interact to create the capabilities necessary for success.

There is almost never a single correct Operating Model. The US Navy and the British Royal Navy, both world-class organisations, each have a different Operating Model. Likewise, most alliances could use any of several Operating Models. While there is more than one good model, there are far more bad ones.

In most cases, our research suggests taking the larger company’s Operating Model as a starting point. Most large firms have poured years into refining and honing their models over time.

This does not mean simply adopting that model. The smaller firm brings much that is new and valuable to the alliance. Finding ways to integrate those new ideas is usually much simpler when starting from a proven model. **Adapt, don't adopt.**

IN PRACTICE

Adapt, don't adopt

"Adapt, don't adopt" has a precise edge in practice. An Operating Model is made of **Levers** – the directly manipulable mechanics, like reporting cadence and decision protocols – and **Capabilities**, the outcomes those levers produce.

Adopt the partner's Levers freely; that's where standardising costs little and buys credibility. Protect your own Capabilities; they're what made you a Target of Choice. And leave **Culture** alone entirely – it isn't a lever either side can pull, only a condition each side works within.

Approached collaboratively, partners can find creative process hybrids that do, indeed, capitalise on each partner's best. Small firms with good reputations in particular therapeutic areas may receive more attentive review by regulators. Larger firms may be able to use well-tested protocols to speed testing. Such successes are built on clear thinking, frank discussion and deliberate design. They rarely emerge on their own.

Compromise and reconciliation do not mean averaging. Driving down the middle of the road is a poor compromise between the UK left-side and the US right-side conventions. Finding the right approach takes effort, creativity and, above all, goodwill.



PART OF OUR APPROACH, FROM AN M&A AND ALLIANCE PERSPECTIVE, IS FOR ME TO DEVELOP STRONG WORKING RELATIONSHIPS AT SENIOR EXECUTIVE LEVELS. THESE CONNECTIONS CREATE MULTIPLE POINTS OF CONTACT FOR COMMUNICATION AND ISSUE RESOLUTION.

– Rusty Field, President & CEO, Upsher-Smith Laboratories

4. Stay Upbeat

There will be setbacks and conflicts – keep the energy positive



It may be natural to become pushy, even insistent. It can be dangerous, too. Very often partner-side individuals find themselves in a difficult spot – their management has made its concerns clear to them. Even if they don't agree with decisions taken by that management, they face the unpleasant task of presenting those decisions to you.

Show your humble pride. Your alliance is a sign of the strengths of your company and its people. Channel that into positive energy. When partners enjoy working together, success is more likely.

This advice goes beyond simply your attitude. This is a recommendation for action. Larger companies tend to be bureaucratic. While this alliance may be one of only a few for your firm, colleagues at the larger partner probably face multiple, conflicting demands on their time and attention. If you and your team inject energy and enthusiasm, it will inspire reciprocity.

Drug development is a challenging, high-risk endeavour. There will be setbacks. There will be conflicts. Other priorities scream for attention. These create stresses. Because of the size difference, however, the stresses will manifest themselves differently in each partner. At your company, a setback may spur a greater drive to push forward – perhaps to accelerate some activities. That same setback may put pressure on your larger partner's alliance team to refocus its energies on another project or even another alliance.

Adaptable people recognise tensions in themselves and others, and help their partners resolve those stresses. It is not easy. A missed deadline may imperil a milestone payment your firm needs to make payroll. It can be easy, even reasonable, to fixate on the threat to your company. Facing pressures of their own, day-to-day partner personnel may appear unconcerned about your problems, or the threat to your company.

By bringing options and solutions, rather than problems, small biotechs can create better working relationships with their larger partners. Show your humble pride and big pharma partners will enjoy working with you and look to do so constructively. You will see benefits in your current alliances and find yourself in greater demand for future collaborations.

Escalation management

Perhaps the most common area where norms-related differences create problems is escalation. A solid governance model defines how and when to escalate decisions. Take note: escalation decisions carry emotional baggage. In most companies, feelings about escalation are shaped by deeply shared, often unseen cultural norms. Violations of such norms, even accidental ones, can trigger violent reactions and long-term enmity.

Escalation points are Value Inflection Points at their sharpest: moments where the decision carries dramatically more weight than the ones around it, and where Human Risk does the most damage per decision.

Not uncommonly, a senior executive or board member of a smaller firm knows someone very senior in the larger partner's company. As tensions rise, there will be a temptation to 'go around the process', escalating the conflict outside the agreed governance channels. This is a perilous decision, not to be taken lightly. It will create resentment. In some companies it may represent an irreparable break with protocol – a breach of trust. While we would not say 'never', smaller-company executives must understand that such an end run is likely to be a one-shot decision, not easily undone. If you choose to do so, be aware of the repercussions.

Several participants in our research noted that too often a small firm's need to escalate around the agreed structure masks an unwillingness to engage the right person in a difficult conversation. There is clear evidence that difficult conversations, pursued with respect and honesty, actually improve relationships, clearing the way for increasing success.

As a general rule, smaller firms need to be comfortable being aggressive in establishing ground rules up front in the alliance. It's far better to fight battles before the collaborative work begins in earnest. Several companies in our study explicitly keep key executives, including CEOs, out of these early, often contentious working sessions. Then, once the actual work begins, those people are not associated with that process.²

Where's the umbrella?

People have a deep-seated sense of what is fair. Many arguments, from children in the playground to executives in the boardroom, boil down to "You're taking advantage of me."

Coupled with this sense of fairness is the nearly overwhelming urge to get even when treated unfairly. The title of this section comes from the tale of the executive who filed an expense claim after a successful business trip.

A CAUTIONARY TALE

She included \$11 for an umbrella she had needed in an unexpected rainstorm. Accounting rejected the claim, deeming the umbrella a non-reimbursable expense. A day later, she resubmitted the form with no umbrella, but with the overall total unchanged. She handed it to Accounting, saying, "Find the umbrella!"

Likewise, the participants in an alliance each bring a sense of what is fair. When someone feels that they or their firm have been taken advantage of, you can be sure they will be looking for opportunities to get even. This sets up a destructive back-and-forth dynamic that wastes time and energy, diverts focus and undermines trust.

This is Human Risk again. It doesn't add a fixed cost to the alliance. It scales whatever Business Risk and Legal/Regulatory Uncertainty are already in play. Two partners who work well together, whether by proven habit or by design, tamp down those underlying risks. Two partners keeping score do the

opposite: baseline risk grows fast, and every minor annoyance becomes a major dispute.

In an alliance there are myriad opportunities to get even. Most of the underpinnings of success are, as noted earlier, difficult to measure or monitor. Has your partner assigned a top medicinal chemist to support the alliance, or are you getting a second-tier player? Does the commercialisation team put in a few extra hours each evening, or head for the exits at five o'clock?

In getting-even conflicts, even useful tools become weapons. A common example in pharma-biotech alliances is the audit. Sound contracts include audit provisions, and regular audits are often specified. They give partners confirmation every few years that every i is dotted and every t crossed.

When one partner decides to wield the audit as a weapon, however, escalation ensues. An executive may feel the other partner is doing something wrong. Rather than talking, that executive invokes the alliance's audit provision. These vindictive audits invariably backfire – in the short term or the long term. Sometimes the audit, which by design looks at both partners, finds that the initiating partner has actually overcharged or undercompensated the target partner. In almost all cases, the vindictive audit will trigger future audits, erode trust and impair alliance performance.

There will be situations where 'winning' is vital to your company's interests. As a leader, however, you must be sure that the goals of aggressive actions are sufficiently important to warrant the longer-term consequences. These are senior-level choices.

On the other hand, an executive we know tells of an alliance she managed a few years ago. Her company owed a progress payment to the partner. The partner company had a shaky accounting department and had failed to issue an invoice for the payment. Several of her colleagues suggested that it might be best for cash flow to wait for the partner company to realise its slip-up. She insisted that they contact the partner's lead executive and ensure the payment was made on time. Over the course of the alliance, this goodwill paid dividends in the companies' working relationship. The alliance became a great value creator for both companies and the basis for future collaboration.

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MY PRIMARY ROLE IS MAKING SURE THAT MY ALLIANCE MANAGERS FEEL COMFORTABLE MAKING ALL 50-50 CALLS IN FAVOUR OF OUR PARTNERS.

– Nelson Sims, Founder of the Eli Lilly Office of Alliance Management

THE GROUNDWORK

Do your homework

Know where you sit in your partner's universe – and how that is changing

If you have an alliance with a large pharmaceutical company, congratulations! You're in rarefied company. While you may not be that company's most important alliance or programme, your partner sees clear value in the relationship.

Now, be realistic. Typically, a large pharmaceutical company's top ten drugs account for close to half of its revenue. Most large pharmaceutical companies manage over a hundred alliances. Maybe yours will achieve Terrific Ten status. But if it doesn't, it can still be great – for you and for them.

As you work with your larger partner, keep a detailed understanding of how your company, its assets and its capabilities fit into your partner's overall plans. This requires more than knowing, for example, that they have a strong franchise in CNS and that your compound would replace their number-two selling CNS drug.

You must also recognise and monitor how that fit may change over time. David S. Thompson – Global Head of Alliance Management at BeOne Medicines, formerly Chief Alliances Officer at Eli Lilly and Company, and former ASAP Chairman – highlights **strategic drift**. Over time, partners' portfolios, priorities and strategies change.

Strategic drift requires what I-SAMM™ calls Synchronization: the continuous work of tracking a partner's changing interests between the periodic, formal moments of Alignment. Alignment can't happen continuously – nobody has the bandwidth. Synchronization is what keeps the gap from widening while drift does its quiet work.

People change, too. The position of your company at a larger partner will change in response to these and other events. You must monitor such changes and understand their implications for your alliance.

Be prepared: where does your alliance fit into your partner's universe?

01

Which therapeutic area? What other compounds or programmes does that partner have in this area?

02

Does your compound offer your partner new markets, or will it cannibalise existing sales?

03

Does the partner have other alliances that might impinge on or compete with yours?

Be transparent with your partner. They will share things with you. They want to succeed, too. Do not be surprised or offended to find they are working with your competitors to ensure multiple options in vital areas.

Build relationships at multiple levels and places in your partner's organisation. Enlist and engage multiple sponsors for your alliance. As personnel or circumstances change, such relationships provide important continuity. You will ensure that the purpose, value and history of your partnership do not get lost.

This is where the Obelisk and Shadow Model does its work. Knowing who's who in the partner organisation means more than a title and a mention in the contract – it means knowing who has genuine influence and who merely has a role that suggests they should. A full version of this exercise is what I-SAMM™ calls a Power Map, a separate exercise beyond this paper's scope – but "build relationships at multiple levels" is where it starts.

Conclusion

These are the lessons from the master practitioners of pharma–biotech alliances. It's too easy to claim, "It's more art than science." There's plenty you can learn. Alliance management practice has advanced significantly over the past three decades.

Much of that progress sat scattered for years – good ideas in individual firms' playbooks, in conference talks, in the heads of practitioners who'd learned the hard way. I-SAMM™, developed over the past several years, is the field's most significant recent leap forward, for the reasons described earlier in this paper. And practitioners can now apply it in open collaboration with their alliance partners.

Smaller-firm executives should understand these lessons, not follow them slavishly. They must adapt to the behaviours and reactions of larger partners. Yes, there is a basic asymmetry: the larger firms almost always have the greater resources and more options. Yet they, too, have a stake in seeing their smaller partners succeed.

Larger firms can learn from this as well. By remaining open to the challenges your partners face, you can sustain a more creative, outcome-driven collaboration. There is a reason that some large firms are more consistently successful in alliances.

It's not all in the science.
It's in the management.

Unconventional wisdom

Attitudes for becoming a Target of Choice

01

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Held together by **Humble Pride**: if you have an alliance with big pharma, you've already succeeded. Pair confidence in your firm with an eagerness to collaborate, and your partnership is far more likely to go the distance.

Get in touch

Would you like to learn more about building high-performing alliances in the pharmaceutical industry?

Connect with the author:



Nick Palmer
nick.palmer@oaklin.com



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serious about business

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Notes

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[2] See Thompson, Butkus, Colquitt and Boudreau, 'The Right Kind of Conflict Leads to Better Products', *Harvard Business Review*, December 2016.

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