

## Partner Health Self-Reflection

This self-reflection is designed to support intentional learning and continuous improvement by helping each organization examine **how it contributes to the health, effectiveness, and sustainability of a partnership.**

Rather than evaluating the partnership as something external, this reflection asks you to assess **your organization's behaviors, decisions, and follow-through** within the partnership—and how those contributions enable or constrain shared success.

### Instructions

1. Review each partnership health indicator by category and/or subcategory (e.g., financial, customer, process, learning and growth).
2. Reflect on **your organization's contribution** to each indicator based on your actions, decisions, and ways of working to date.
3. Rate each indicator using the 3-point Partnership Health Rating Scale below, based on **how well your organization is supporting the partnership's success—not the ideal state.**
4. Provide brief notes or examples that describe:
  - What your organization is doing well
  - Where your organization may be creating friction, gaps, or ambiguity
5. Complete this reflection independently before group discussion to ensure multiple perspectives and honest self-assessment.

### Partnership Health Rating Scale

- ★ – Our organization is contributing strongly and consistently
  - ✓ – Our contribution is generally solid but could be clearer or more effective
  - ? – Our contribution is unclear, inconsistent, or creating challenges
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## Partnership Health Self-Reflection (★ / ✓ / ?)

### Financial

**How effectively is our organization contributing to the partnership's financial health and growth?**

**Indicator Focus:**

- Lead generation activities we own or support
- Conversion effectiveness
- Deal progression and follow-through
- Revenue contribution and forecasting reliability

**Rating:**

**Notes (What we are doing / not doing that matters):**

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### Customer – Satisfaction

**How well does our organization contribute to a positive partner-branded customer experience?**

**Indicator Focus:**

- Responsiveness to LEA needs
- Consistency of messaging and delivery
- Contribution to customer retention and satisfaction

**Rating:**

**Notes:**

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### Customer – Impact

**How effectively does our organization contribute to meaningful outcomes for educators, leaders, and students?**

**Indicator Focus:**

- Quality of professional learning we deliver or enable
- Contribution to instructional quality and educator confidence
- Evidence of student engagement, mindset, or achievement gains

**Rating:**

**Notes:**

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## **Process – Operational Efficiency & Coordination**

**How clearly and reliably does our organization execute its role within joint processes?**

**Indicator Focus:**

- Role clarity and ownership
- Coordination in sales, delivery, and support
- Participation in joint training or enablement activities

**Rating:**

**Notes:**

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## **Process – Communication & Trust**

**How does our organization contribute to trust, clarity, and reliability in the partnership?**

**Indicator Focus:**

- Timeliness and transparency of communication
- Follow-through on commitments
- Internal alignment before external commitments are made

**Rating:**

**Notes:**

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## **Learning & Growth – Alignment & Complementarity**

**How intentionally does our organization align its strategy and offerings to strengthen the partnership?**

**Indicator Focus:**

- Engagement in shared planning and prioritization
- Use of co-branded or aligned materials
- Willingness to adapt offerings to better complement the partner

Rating:

Notes:

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## Learning & Growth – Innovation & Quality

How actively does our organization use feedback and data to improve the partnership's offerings?

Indicator Focus:

- Responsiveness to customer feedback
- Iteration and refinement of joint work
- Commitment to quality under real-world constraints

Rating:

Notes:

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## Learning & Growth – Sustainability

How responsibly does our organization contribute to the long-term viability of the partnership?

Indicator Focus:

- Risk identification and mitigation
- Contingency planning
- Clarity and durability of agreements and commitments

Rating:

Notes:

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## Overall Partner Contribution Assessment

Based on your ratings across indicators, how would you characterize **your organization's current contribution to the partnership?**

- **Strong & Strategic** – We are highly aligned, reliable, and additive; our actions actively advance shared goals.

- **Functional & Productive** – We contribute positively overall, with some areas that need tightening or clarification.
  - **Developing & Inconsistent** – Our contribution shows promise but lacks consistency, clarity, or follow-through.
  - **Misaligned & Fragile** – Our actions or assumptions are limiting partnership value and require recalibration.
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### Reflection Prompt (Critical)

**What are the implications of this assessment for how your organization needs to show up differently in this partnership over the next 3–6 months?**

- What should we **start doing, stop doing, or do more deliberately**?
  - Where do we need clearer ownership, faster decision-making, or stronger internal alignment?
  - What commitments are we prepared to make—and keep?
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