

# Workshop Outline



*“Your Project Management Knowledge Connection”*

## OVERVIEW

This workshop develops fundamental procurement process knowledge and skills – skills you can apply immediately in all aspects of effective operational and project procurements. You will learn a step-by-step process for converting business and/or project needs into outsourced goods and services, and for selecting the best possible suppliers. You will also learn to manage internal and external stakeholders involved in the supply chain.

This workshop is aligned to the Project Management Institutes (PMI®) standards.

## AUDIENCE

The workshop is intended for anyone involved in procurement. In particular, it will benefit operational managers, project managers, team leaders, evaluation teams and program managers who want to put the concepts and techniques of effective contracting into practice. The workshop is very hands-on, hence it is recommended to limit to a maximum of 16 participants.

## BENEFITS

- Identify stakeholder expectations & convert their needs into contract requirements
- Assess the strengths & weaknesses of contract types & select the best one for the situation
- Create supplier selection criteria & build a Supplier Evaluation Model (SEM)
- Learn a structured approach to selecting suppliers
- Conduct a bidders' conference
- Shortlist & select preferred suppliers
- Strengthen your negotiating techniques to achieve 'win-win' outcomes
- Monitor and control supplier performance, to ensure requirements standards are met
- Amend contracts & manage changes that occur during the procurement process
- Maintain productive working relationships with suppliers
- Reduce the potential for disputes & legal action, by understanding the legal requirements and implications of contracts

## FORMAT

The action-learning format features interactive group discussion and simulated exercises in “real-world” business and project environments. Working in teams, you will apply the tools and techniques you are learning, and experience the process of collaborative planning and see its effectiveness firsthand. You will have ample opportunities to share ideas with other participants and to receive guided feedback from the Workshop Leader. In addition, hand-outs are provided for reference. This format is specifically designed to enable you to apply procurement management skills immediately back at work.

## TAKE-AWAYS

- Reference Manual
- Hand-Outs and Templates
- Certificate of Completion
- 14 PMI® Professional Development Units (PDUs)
- Website & Book References

## COURSE CONTENT

### Introduction

- Workshop Guidelines
- Introductions
- Workshop Objectives, Format & Agenda

### Procurement Management Framework

- Procurement Life Cycle & the Project Life Cycle
- Procurement Management Key Roles and Responsibilities
- Procurement Organizations
- Contract Types
- Risk Transfer Through Contracting
- Common Constraints & Legal Issues

### Planning Procurements

- Building Your Evaluation Team
- Needs Analysis
- Stakeholder Expectations & Requirements Mapping
- Developing the Procurement Management Plan & Procurement Statement of Works (SOWs)
- Identifying Potential Suppliers
- Drafting Legal Tendering Documents
- Defining Selection Criteria & Weights
- Creating the Supplier Evaluation Model (SEM)

### Conducting Procurements

- Advertising & Conducting the Bidder's Conference
- Short-listing the Suppliers
- Supplier Evaluation Techniques
- Selecting the Preferred Supplier
- Ensuring Due Diligence & An Equitable Process
- Principled vs. Positional Negotiations
- Negotiating Objectives & Principles

### Administering Procurements

- Monitoring & Controlling Supplier Performance
- Managing Supplier Relationships
- Amending Contracts
- Conducting Claims & the Dispute Process

### Closing Procurements

- Procurement Auditing
- Settling Contracts & Early Termination

### Workshop Conclusion

- Avoiding Mistakes of the Past - Tips to Remember
- Individual Opportunities for Improvement



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