

# Workshop Outline



*"Your Project Management Knowledge Connection"*

## OVERVIEW

The integration of technology will have a profound effect on how well your business operates in the future. Successful businesses must learn to leverage their technology in order to assist the business in gaining competitive advantage. Capitalize on changing the way they do business at the same time of implementing new systems, by learning to consider how technology will support the business goals, not drive the desired state.

This is a fundamental workshop to develop basic systems selection process knowledge & skills – skills you can begin to apply immediately. These practical and effective tools and techniques will help you step-by-step select the best possible systems and maximize your return-on-investment with technology; which both will help setup conditions for implementation success for the new systems selected.

## AUDIENCE

The workshop is intended for Business Managers, Users, and the Project Manager and Evaluation Team who are involved in, or planning to be involved in IT procurements of any size and type i.e. the selection of hardware, software applications and/or professional services firms, or for people wanting an overview of the systems selection structured approach. The workshop is very hands-on, hence it is recommended to limit to a maximum of 16 participants.

## BENEFITS

- Follow a structured approach to selecting systems
- Build a high-level business model representing your business
- Define requirements that meet your business needs
- Create vendor selection criteria
- Develop a Vendor Evaluation Model (VEM)
- Conduct a vendor / bidder conference
- Build Vendor Demonstration Scripts (VDS)
- Shortlist vendors
- Conduct vendor client site visits

## FORMAT

The hands-on format features interactive discussion, action-learning and team simulated exercises. You will be grouped into teams that will work together in “real-world” project environments. Each team will use the tools and techniques presented in the workshop, enabling you to experience the process of collaborative planning and see its effectiveness firsthand. In addition, hand-outs are provided for reference, dialogue sessions and reviews are conducted for experience and idea sharing, and guided feedback from the Workshop Leader to reinforce learning. This format will enable you to immediately apply procurement management skills 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
- Where Procurement Management Fits in the Project Life Cycle
- Procurement Management Key Stages
- Procurement Management Key Roles and Responsibilities
- Procurement Organizations
- Key Constraints

### Define Your Requirements

- Creating Your Selection / Evaluation Team
- Creating a High-Level Business Model
- Creating Requirements and Selection Criteria
- Creating Selection Criteria Weights & Mandatory Criteria



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Customized Workshop  
Solutions

### Shortlist the Vendors

- Identify Potential Vendors
- Create Legal Tendering Documents – RFI/RFP/RFQ
- Key Procurement Concepts
- Conduct the Bidder's Conference
- Create the Vendor Evaluation Model
- Shortlist the Vendors

### Select the Preferred Vendor

- Prepare for Vendor Demonstrations
- Conduct Vendor Demonstrations
- Prepare and Conduct Client Site Visits
- Conduct Sit & Play Sessions
- Select the Preferred Vendor

### Workshop Conclusion

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





LEARNING CENTRE

### **Inquire About Our Customized Workshop Solutions**

If your business requires confidentiality or a tailored approach to your business, a customized approach is available. Call us at 604-461-0104, or email [learning@ciki.ca](mailto:learning@ciki.ca).

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