



# KPMG Centre for Strategic Relationships and Contract Management

**In today's rapidly changing business environment, it is increasingly important to establish proactive, flexible, and collaborative relationship amongst existing and potential partners to achieve sustainable performance on major programs and projects, both simple and complex.**

## Strategic Relationships Solutions Inc. and KPMG

It is no secret that many complex multi-party business arrangements fall short of meeting stakeholder's expectations over the long term. Often this is due to rigid contractual agreements and oversight mechanisms which are designed to reinforce the transactional orientation of these business arrangements. These business arrangements fail to recognize that complex programs and projects require business arrangements that can respond to evolving needs and not be stuck as a static, isolated rule-book.

By recognizing that the relationship between all parties involved is at the heart of successful program and project delivery, business arrangements can be structured and managed within a collaborative and adaptive framework which drives change and improves outcomes, while lowering overall risk.

KPMG and Strategic Relationships Solutions Inc. have joined forces to establish the KPMG Centre for Strategic Relationships and Contract Management. The Centre is dedicated to providing training, advisory services, and thought leadership in the areas of relationships management, relational contracting and collaborative working.

We are pleased to offer you our flagship, best practice training program on complex business relationship management, relational contracting, and collaborative working that enable partners to advance programs and projects effectively and efficiently. This three-day training program provides attendees with a systematic approach to establishing and managing collaborative and adaptive relationships and the tools to shift organizational mindsets to create a culture of collaboration and trust.

***Strategic Relationships and Relational Contract Management Training***



# Strategic Relationships and Relational Contracting Management Training Program

## Training Program Particulars

### The Relational Model – An ISO Standard

The underpinning of the training program is a relational model which supports the development and administration of an adaptive and collaborative business relationship between partners to achieve common objectives. The model and its implementation methodology operationalize ISO 44001, recently approved in December 2016 and published in March 2017. It describes the organizational requirements to enable relationship management and guidance for establishing relationship management plans with strategic partners.

### Certification

Participants who complete and submit the case work book within 60 days of completing the in-class course and achieve a minimum score of 80%, will receive their certification in relationship management, collaborative working, and relational contracting.

### Who Should Attend

This training program is recommended for public and private sector executives, relationship managers, business development executives, procurement officers, outsourcing advisors, and managers responsible for planning, sourcing, negotiating or managing complex business arrangements.

### Delivery Format

This course is delivered over three days, combining short lectures (30-45 minutes) with case work in small teams, and large group discussions. The course features real, current complex relationships in the public and private sector.

## Learning Objectives

- Gain insight into the issues and challenges with managing complex business relationships;
- Understand the difference between managing individual one-to-one relationships and relationship management as a system and a framework for improving outcomes;
- Learn about the definitive framework for relationship management best practices - the ISO 44001 international standard;
- Learn about relationship charters, joint governance, relationship performance management and collaborative competency development systems;
- Learn about the processes and tools needed to establish and operationalize relationship management frameworks in diverse stakeholder environments;
- Learn how to assess relationship fit and partner capability, related to desired project/program outcomes, from a relational contracting perspective;
- Learn how to apply relational contracting principles – how to plan, source and manage adaptive relationships that will provide ongoing opportunities to improve project and program outcomes;
- Learn about the internal governance and management systems to enable and support external collaborative relationships;
- Learn how to form and launch high performing teams in an environment of trust and collaboration;
- Gain the ability to lead and facilitate collaborative engagements to operationalize ISO 44001 relationship management plans;
- Develop the capability to manage the culture change and the transition phase of complex business arrangements.



# Strategic Relationships and Relational Contracting Management Training Program

## Course Outline

- Review the underlying causes of underperforming complex business relationships, including the challenges typically associated with long-term business arrangements (public-private and inter-public sector) that all too often fail. Identify how to either avoid or reverse these challenges;
- Introduce relationship management, including a thorough review of the ISO 44001 Standard for Collaborative Business Relationships, and its potential impact on your organization;
- Discuss in detail the key elements of a leading practice relationship management model, including the corresponding operational framework, both of which are based on proven collaborative methods and international standards;
- Provide a maturity model for assessing the effectiveness of a relationship and business arrangement management practice;
- Provide a framework for establishing and operationalizing relationship management frameworks (public-private and public-public) including arm’s length relationships;
- Provide a systematic model for relational contracting management – that will allow you to incorporate best practices into your new and existing business arrangements;
- Provide a framework for implementing relationship performance and interrelationship risk management.

## Agenda

DAY 1	Day 1	Day 2	Day 3
8:00 – 8:30 a.m.	Breakfast	Breakfast	Breakfast
8:30 – 12:00 p.m.	<b>Relationship management overview</b> <ul style="list-style-type: none"> <li>• A macro level overview of Relationship Management and ISO 44001</li> <li>• Complex arrangements overview, challenges, and opportunities</li> </ul>	<b>Implementation – Relationship management plans</b> <ul style="list-style-type: none"> <li>• ISO 44001 – Overview and guidance;</li> <li>• Developing and operationalizing the Relationship Charter and Corporate Relationship Management Plan</li> </ul>	<b>Relational contracting management</b> <ul style="list-style-type: none"> <li>• Procurement of strategic relationships in the public and private sectors</li> <li>• Strategic analysis and partner selection tools</li> </ul>
12:00 – 1:00 p.m.	Lunch	Lunch	Lunch
1:00 – 4:00 p.m.	<b>Relationship management framework reference model</b> <ul style="list-style-type: none"> <li>• Introduction to collaborative, relationship-based management frameworks</li> <li>• Relationship Charter - Foundations of a collaborative business relationship</li> </ul>	<b>Implementation - Managing relationships</b> <ul style="list-style-type: none"> <li>• Performance management; Integrated risk and enablement management, information sharing; and relationship administration</li> </ul>	<b>Collaborative competencies &amp; change management</b> <ul style="list-style-type: none"> <li>• Interest-based problem-solving approach; creating a culture of collaboration and trust; managing the change.</li> </ul>
3:30 – 4:00 p.m.			Guest speaker
4:00 – 4:30 p.m.	Guest speaker	Guest speaker	Closing remarks and takeaways



# Your Instructors

## Instructors & Facilitators

### Andy Akrouche, MBA, RCM Lead Instructor

Andy Akrouche is the industry leader in developing and managing adaptive, dynamic public-private and public-public relationships. Andy helps organizations develop and implement high performing relationships by moving their business arrangements from static transactions to adaptive relationships that are flexible, agile, and collaborative.

Andy delivers executive seminars and training programs on relationships management, relational contracting management, outsourcing, ASD, commissioning and PPP management. He is the author of the book, [\*Relationships First: The New Relationship Paradigm in Contracting\*](#). Andy is also the Managing Director of the Institute for Collaborative Working (ICW) Canada, a member of the Canadian ISO 44001 collaborative working management committee and a member of the Canadian ISO mirror committee on IT governance, ITSM, Business Process Outsourcing and Architecture and Performance Management. Andy holds a Master's Degree in Business Administration from the University of Ottawa.

### Jean-Francois Seguin, MBA

Jean-François has over 18 years of experience, including many years of his career with the Royal Canadian Navy, and now working in the private sector with KPMG. He has acted as project and deputy project manager in a variety of maritime and government projects including projects dealing with warship maintenance, maintenance planning and execution, equipment lifecycle management and the installation of SAP functionality on warships and submarines.

Jean-François was a requirements manager representing the Royal Canadian Navy in the implementation of the National Shipbuilding Procurement Strategy, a national level \$32B program. He has also been heavily involved in providing procurement advice to the Canadian Surface Combatant project under the National Shipbuilding Strategy.

### Monty Mukerji, MBA, PMP, RCM

Mr. Mukerji is a senior executive with 30 years of experience. While at Public Works and Government Services Canada (PWGSC), Mr. Mukerji was the Senior Director of the Acquisitions Branch. During his Federal Government career, Monty enabled multi-billion dollar defence and information technology system major Crown projects. Monty promotes a collaborative approach to structuring and managing complex relationships, particularly for inter-departmental team building, alignment, and a collegial decision-making process.

Since Joining the SRS team, Monty has worked with leading public and private organizations to help them establish and operationalize collaborative relationships. Monty is a certified Project Management Professional, Relational Contracting Management Instructor and holds an MBA from St. Mary's University in Halifax.

### Jon Hansen, RCM

As the Editor and lead writer for the PI Social Media Network's Procurement Insights Blog, Jon Hansen has written nearly 3,000 articles and papers; as well as five books on subjects such as supply chain practice, public sector policy, emerging business trends and social media.

Jon received an American Flag that was flown over the Virginia State Capital in Richmond in recognition of his contribution to the 2014 Public Procurement Forum. His presentation on "Bridging the Disconnect between Finance and Purchasing" wrote Virginia's CPO, "was extremely helpful to an extraordinary number of the Commonwealth's procurement staff," and that the insights from these sessions will enable "many to re-examine their current activities with an eye on improvements."