



Strategic Relationships Management – ISO 44001 Series

Relationships Management as a System, Relational Contracting and Collaborative Working

Course Summary

Description

This course is provided and delivered by Strategic Relationships Solutions inc. (SRS) in partnership with The Institute for Collaborative Working Canada (ICW Canada) and the Center for Collaborative Stakeholders Relationships (CCSR).

It is not a secret that the majority of complex projects and business arrangements fall short of meeting stakeholder expectations. Research shows that the fundamental issues are rooted in the fact that business arrangements are structured and managed as static “transactions” or “deals” that do not provide the agility and flexibility to respond to change, drive evolution and sustained value creation.

As such, service delivery models, procurement, and vendor management practices are undergoing significant transformations to address the increasing levels of volatility, uncertainty, and complexity of the business environment in which we now operate. **Relationships Management, Relational Contracting and Collaborative Working** have emerged as key pillars for achieving success in complex projects and business arrangements.

Training for a Relational Approach

The relationship between all parties involved, is the heart of their success. By positioning the relationship among stakeholders at the heart of planning, delivery and performance management, business arrangements can be structured and managed within a collaborative and adaptive framework which drives meaningful change and improves outcomes, while lowering overall risk.

This training program has helped many executives and program/project managers achieve greater success by enabling collaboration, integrated delivery, and mutual value creation with their clients, partners, and strategic suppliers. By employing the insight-based relationship management systems and collaborative working models learned in this course, organizations have been able to simplify communication and coordination, create an integrated team approach to delivery, reduce uncertainty, lower risk, and achieve better overall outcomes in complex programs and business arrangements.

This Relationships Management, Relational Contracting and Collaborative Working training provides participants with the essential knowledge needed to establish and manage adaptive and collaborative business relationships able to take advantage of change and to navigate through today’s volatile, uncertain, and increasingly complex business environment. They will learn how to establish effective collaboration frameworks which will facilitate true integrated delivery, create sustained mutual value, effectively manage third party relationship risks and enable joint success. Participants will also be provided with the methodology and tools to shift organizational mindset and to create a culture of collaboration and trust.

The training is delivered using a mix of short lectures, group discussions and group case work spotlighting current complex projects and business arrangements in the public and private sector.

ISO 44001- Collaborative Business Relationship Management

At the core of this program is a collaboration model that supports the development and administration of a dynamic, adaptive and collaborative business relationship between collaborators to achieve their goals and create mutual value. The model and its implementation methodology operationalize ISO 44001 effectively; an international standard published in March 2017, that describes organizational requirements to enable relationship management and provide guidance for establishing relationship management plans with strategic collaborators.

PMCD 3 Equivalency

This course is deemed as an approved equivalency for the National Defence Canada (DND) PMCD 3 qualification requirement.



Strategic Relationships Management – ISO 44001 Series

Relationships Management as a System, Relational Contracting and Collaborative Working

Objectives

Through this training program, participants will gain knowledge and a deeper understanding of:

- The issues and challenges of managing complex projects and business arrangements with partners, clients, and key suppliers
- The processes and tools for establishing and operationalizing relationships management and collaboration frameworks, including joint relationship charters, joint governance systems, relationship performance and risk management, collaborative working and collaborative competency
- Transitioning “relationship management” from an individual one-to-one connection to “relationship management as a system” and a platform for effective collaboration and value creation
- Approaches for evaluating relationship health, risk, strategic fit and capability to deliver project/program outcomes
- Approaches for creating mutual value in existing or new relationships based on alignment of relationship goals, incentivization and reward sharing
- The processes and tools necessary to successfully establish and operationalize relationship management frameworks in diverse stakeholder environments
- The various sourcing and contracting models and how to apply relational contracting and ISO 44001 principles to provide ongoing opportunities for enhanced project and program outcomes – How to move from Transactions to Relationships
- How to develop effective compensation and incentivization models to drive the right behaviour and reduce competing interests
- How to lead and facilitate collaborative engagements to develop and implement ISO 44001 relationship management plans
- How to form and launch high-performing joint stakeholder teams and create an environment of trust and collaboration
- Collaborative Change and Transitions Management of complex programs and business arrangements
- ISO 44001 Corporate Relationship Management Plans, internal governance and management systems needed to enable and support collaborative relationships

Topics

- Relationships Management Overview
- Relationship Management and Collaboration Framework Reference Model
- Implementation – Developing and Operationalizing Relationship Management and Collaboration Frameworks & Creating Mutual Value
- Relationship-Based Contracting Management (Relational Contracting)
- Interest-Based Negotiations and Issue Resolution
- Internal Systems and Oversight – ISO 44001 CRMP
- Managing Transitions
- Optional Certification Workshop

Audience

The program is recommended for public and private sector executives, partner/vendor relations managers, business development executives, senior project managers, procurement officers and outsourcing advisors, as well as managers responsible for planning, sourcing, negotiating or managing complex business arrangements.

Prerequisites

Before taking this course, students should have intermediate level of knowledge/experience in any of the following: Program/Project Management, Procurement, Public-Private Partnerships, Client-Vendor Relationships Management, Outsourcing/Managed Services, Supply Chain Management, and Multi-Stakeholder Relationships Management.

Duration

Two and a half days



Strategic Relationships Management – ISO 44001 Series

Relationships Management as a System, Relational Contracting and Collaborative Working

Course Outline

Day 1

I. Module 1: Relationships Management Overview

- A. Provide a macro level overview of Relationships Management Systems and Industry Trends
- B. Briefly discuss the central common issues in complex programs, projects and business arrangements, as well as challenges and opportunities

II. Module 2: Relationship Management and Collaboration Framework Reference Model

- A. Introduction to Collaborative Relationship Management Frameworks
- B. Relationship Management Charter - Foundations of a Collaborative Business Relationship

III. Module 3: Implementation – Developing and Operationalizing Relationship Management and Collaboration Frameworks & Creating Mutual Value

- A. Collaborative Convergence Process – The key to shifting the mindset and achieving optimum collaboration
- B. Developing and operationalizing the ISO 44001 joint relationship charter and corporate relationship management plans
- C. Working in Teams – Collaborative Behaviors, Conversational and Emotional Intelligence
- D. Relationship Performance Management, Innovation, Integrated Risk Management, Enablement Management, Issues Management and Information Sharing

Day 2

- E. Collaborative Convergence Process – The key to shifting the mindset and achieving optimum collaboration
- F. Developing and operationalizing the ISO 44001 joint relationship charter and corporate relationship management plans

- G. Working in Teams – Collaborative Behaviors, Conversational and Emotional Intelligence

- H. Relationship Performance Management, Innovation, Integrated Risk Management, Enablement Management, Issues Management and Information Sharing

IV. Module 4: Relationship-Based Contracting Management (Relational Contracting)

- A. Overview of common sourcing models
- B. Relational Contracting Management – What makes an arrangement relational? What do we need to do differently? How do we implement Intra-relationship collaborative contracting
- C. Procurement Relational Assessment – To what degree a business arrangement needs to be relational
- D. How do we evaluate industry structures and assess strategic fit with a potential partner?

V. Module 5: Interest-Based Negotiations and Issue Resolution

- A. Introduction to Interest-based negotiation, issue management and resolution

VI. Module 6: Internal Systems and Oversight – ISO 44001 CRMP

- A. ISO 44001 Corporate Relationship Management Plan – Internal Systems and Management Structures to support collaboration

VII. Module 7: Managing Transitions

- A. Introduction to collaborative change and transition Management

Day 3

VIII. Module 8: Optional Certification Workshop

- A. For those that are seeking professional certification in relational contracting management, this 3.5 hour facilitated workshop is designed to assist participants in completing certification requirements.