



# Centre for Strategic Relationships

## Relationships Management and Relational Contracting Training and Certification Program

With an effective approach to implementing ISO 44001

Strategic Relationships Solutions Inc. and KPMG in Canada

[kpmg.ca](http://kpmg.ca)



*In today's rapidly changing business environment, it is increasingly important to establish proactive, flexible, and synergistic relationships with existing and potential partners. This is fundamental to achieving sustainable performance on major programs and projects of any scale.*

Despite industry's best effort to effectively operationalize procurement and commercial contract management, many complex programs and projects requiring significant public-private collaboration fall short of meeting stakeholder expectations. The single leading contributor to this shortfall is that business arrangements are structured and managed as rigid transactions or deals and; therefore, do not adapt well to change and the resulting need for collaboration and ongoing alignment.

There is a better way. 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.

That's why KPMG and Strategic Relationships Solutions (SRS) Inc. have joined forces to create the KPMG Centre for Strategic Relationships – a centre dedicated to providing training, advisory services, and thought leadership for relationships management, relational contracting, and collaborative working.

### **Training for a Relational Approach**

This three-day KPMG-SRS training program has helped many organizations take the complexity out of relationships management, employ insight-based models to reduce uncertainty, and effectively manage to achieve shared outcomes. During the seminar, attendees will learn a systematic model for effectively managing complex relationships. As they progress through the program, they will gain the knowledge and skills to effectively plan, source, establish and maintain relationships that will deliver exceptional performance. We will also provide them with the methodology and tools to shift organizational mindset and to create a culture of collaboration and trust.

This training program is delivered using a mix of short lectures, group discussions, and case work spotlighting current complex relationships in the public and private sector.

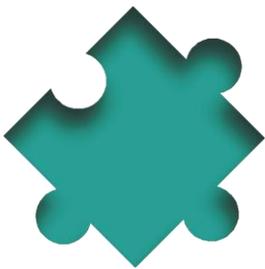
The program is recommended for public and private sector executives, relationship managers, business development executives, procurement officers, and outsourcing advisors; as well as managers responsible for planning, sourcing, negotiating or managing complex business arrangements.

### **ISO Standard**

At the core of this program is a relational business model that supports the development and administration of an adaptive and collaborative business relationship between collaborators to achieve common objectives. The model and its implementation methodology operationalize ISO 44001, a standard published in March 2017 that describes organizational requirements to enable relationship management and guidance for establishing relationship management plans with strategic partners.

### **Certification**

Participants earn a certification in relationship management, collaborative working, and relational contracting by submitting a completed case work book and achieving a minimum score of 80% within 60 days of completing the in-class course.





### Learning Outcomes

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

- Issues and challenges of managing complex business relationships.
- Best practices for assessing relationship fit and partner capability with regards to desired project/program outcomes.
- Differences between managing individual one-to-one relationships and relationship management as a system and a framework for improving outcomes.
- The ISO 44001 international standard - the definitive framework for relationship management best practice.
- Relationship charters, joint governance, relationship performance management, and collaborative competency development systems.
- The processes and tools necessary to establishing and operationalizing relationship management frameworks in diverse stakeholder environments.
- Internal governance and management systems that enable and support external collaborative relationships.
- Apply relational contracting principles (e.g. planning, sourcing, and managing adaptive relationships) to provide ongoing opportunities for enhanced project and program outcomes.
- Lead and facilitate collaborative engagements to operationalize ISO 44001 relationship management plans.
- Form and launch high-performing teams in an environment of trust and collaboration, and manage the culture change and the transition phase of complex business arrangements.



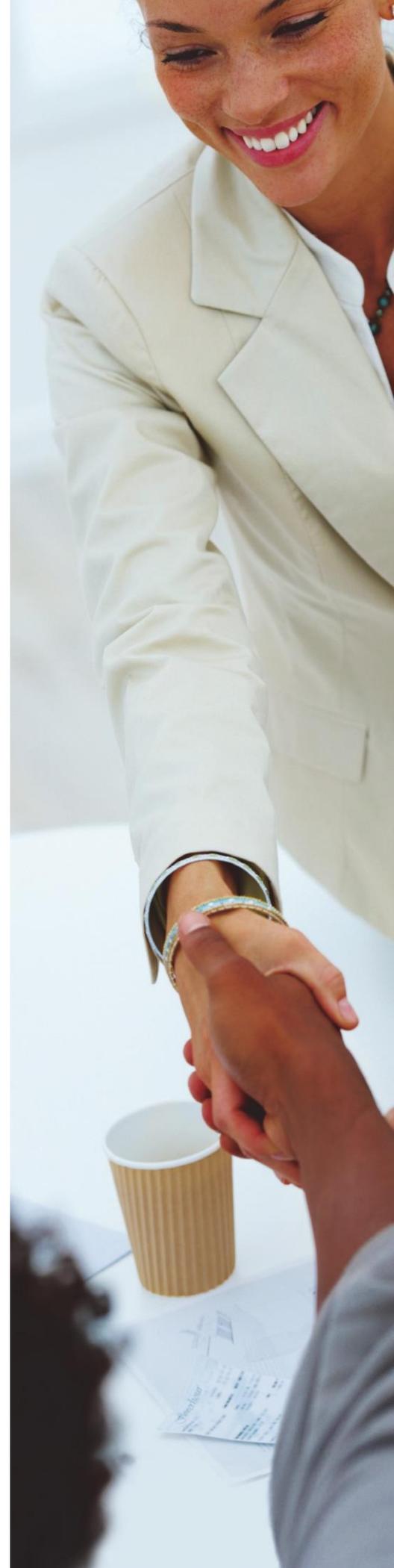
### Course Outline

Over the course of this three-day program, our experienced instructors will:

- Review the underlying causes of under-performing 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 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.
- Detail the key elements of the relationship-based (relational) business 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 relationship and business arrangement management practices.
- Provide a systematic model for evaluating the degree to which relational contracting and relationship management are required in a business arrangement.
- Provide both a collaborative and inclusive 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; and a framework for implementing relationship performance and interrelationship risk management.

# Agenda

DAY 1	
8:00 – 8:30 a.m.	Breakfast
8:30 – 12:00 p.m.	<b>Relationship management overview</b> A macro level overview of Relationship Management and ISO 44001/2 Complex arrangements overview, challenges, and opportunities
12:00 – 1:00 p.m.	Lunch
1:00 – 4:00 p.m.	<b>Relationship management framework reference model</b> Introduction to collaborative, relationship-based management frameworks Relationship Management Charter - Foundations of a collaborative business relationship
4:00 – 4:30 p.m.	Guest speaker
DAY 2	
8:00 – 8:30 a.m.	Breakfast
8:30 – 12:00 p.m.	<b>Implementation – Relationship management plans</b> ISO 44001 – Overview and guidance; Developing and operationalizing the Relationship Charter and Corporate Relationship Management Plan
12:00 – 1:00 p.m.	Lunch
1:00 – 4:00 p.m.	<b>Implementation – Managing relationships</b> Relationship performance management; integrated risk and enablement management, information sharing; and relationship administration
4:00 – 4:30 p.m.	Guest speaker
DAY 3	
8:00 – 8:30 a.m.	Breakfast
8:30 – 12:00 p.m.	<b>Relational contracting management</b> Relational contract assessment and procurement of strategic relationships in the public and private sectors Strategic analysis and partner selection tools
12:00 – 1:00 p.m.	Lunch
1:00 – 4:00 p.m.	<b>Collaborative competencies &amp; change management</b> Interest-based problem-solving approach; creating a culture of collaboration and trust; managing the change.
3:30 – 4:00 p.m.	Guest speaker
4:00 – 4:30 p.m.	Closing remarks and takeaways



# Instructors & Facilitators

## **Andy Akrouche, MBA, RCM Lead Instructor**

Andy is the executive lead for the KPMG-SRS Centre for Strategic Relationships, Managing Director of the Institute for Collaborative Working (ICW) Canada, the vice chair of the Canadian ISO 44001 collaborative relationship management mirror committee, and a member of the Canadian ISO mirror committee on IT governance, ITSM, Business Process Outsourcing and Architecture and Performance Management.

As an industry leader in developing and managing adaptive, dynamic public-private and public-public relationships, Andy delivers executive seminars and training programs on relationships management, relational contracting management, outsourcing, ASD, commissioning and PPP management.

He is also the author of Relationships First: The New Relationship Paradigm in Contracting and holds a Master's Degree in Business Administration from the University of Ottawa.

## **Monty Mukerji, MBA, PMP, RCM**

An SRS senior executive with 30 years of experience, Mr. Mukerji works with leading public and private organizations to establish and operationalize collaborative relationships. Prior to joining SRS, he was Senior Director of the Public Works and Government Services Canada's (PWGSC) Acquisitions Branch, during which time he enabled multi-billion dollar defence and information technology systems for major Crown projects.

Monty is a certified Project Management Professional, Relational Contracting Management Instructor. He promotes a collaborative approach to structuring and managing complex relationships; particularly for inter-departmental team building, alignment, and a collegial decision-making process. He holds an MBA from St. Mary's University in Halifax.

## **Jean-François Séguin, MBA**

Jean-François has over 18 years of experience, including his time with the Royal Canadian Navy and his current private sector role with KPMG in Canada. 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 computerized maintenance management software functionality on warships and submarines.

Jean-François was also 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.

## **Jon Hansen, RCM**

Jon is the editor and lead writer of PI Social Media Network's Procurement Insights Blog. He has written five books and nearly 3,000 articles and papers on subjects such as supply chain practice, public sector policy, emerging business trends and, social media. In 2014, he received an American Flag that was flown over the Virginia State Capital in Richmond in recognition of his contribution to that year's Public Procurement Forum.

# Contact us

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