



# KPMG-SRS Centre for Strategic Relationships

Relationships Management,  
Relational Contracting and  
Collaborative Working  
Training Program

2019 Edition with an effective approach to implementing ISO 44001



# Achieving sustainable performance in complex programs and projects requires that both existing and potential partners establish proactive, flexible, and collaborative relationships.

Research has shown that many complex programs and projects requiring significant collaboration fall short of meeting stakeholder expectations in the long term. These include complex procurements, EPC and IT project delivery, public-private and public-public partnerships, commissioning, AFD, and outsourcing as well as modernization initiatives. While many factors contribute to this shortfall, the problems almost always originate with a rigid transactional orientation and poor oversight models of management.

There is a better way. 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 change and improves outcomes, while lowering overall risk.

## Training for a Relationship Approach

During the seminar, attendees will learn a systemic 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.

## Delivery Format

This training program is delivered using a mix of short lectures, group discussions, and case work spotlighting current complex programs, projects and outsourcing / shared services relationships in the public and private sector. Our experienced advisors will work side by side with participants sharing their insights and knowledge gained from over 100+ years in multi-disciplinary endeavors at executive and senior executive levels.

## Who should attend

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

Participants earn a certificate 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.

Complex programs, projects, public-private and public-public business arrangements that require significant collaboration often fall short of meeting stakeholder expectations.

## Program Takeaways

*Understanding Relationship Management as a system and taking successful collaboration from a circumstantial occurrence to a systemic and systematic model of management.*

## ISO Standard

At the core of this program is a relationship business model that supports the development and administration of an adaptive and collaborative business arrangement between collaborators to achieve joint 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 purvey guidance for establishing relationship management plans with strategic partners.



## 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 establish and operationalize relationship management frameworks in diverse stakeholder environments.
- Internal governance and management systems that enable and support external collaborative relationships.
- Apply relationship-based collaborative 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 and help create an environment of collaboration and trust.



## Course Outline

Over the course of this two-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.
- Review 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, collaboration and relationship management are required in a business arrangement.
- Review the key elements of a collaborative convergence process for establishing and operationalizing relationship management frameworks in public-private and public-public relationships.
- Present a systematic model for sourcing and managing new business relationships that will allow you to incorporate best practices in planning and procurement, partner selection, strategic fit assessment, financial evaluation and incentivization systems, interest based negotiations, transition and change management, relationship performance and interrelationship risk management.

# Agenda

## DAY 1

8:00 – 8:30 a.m.	Breakfast
8:30 – 9:00 a.m.	Introductions Relationship Kickstart – Conversational and Emotional Intelligence
9:00 – 12:00 p.m.	Relationship management overview <ul style="list-style-type: none"><li>• A macro level overview of trends in Relationship Management and International standards</li><li>• Complex arrangements overview, challenges, and opportunities</li><li>• Introduction to collaborative, relationship-based management frameworks</li></ul>
12:00 – 1:00 p.m.	Lunch
1:00 – 4:00 p.m.	Relationship management as a system <ul style="list-style-type: none"><li>• Relationship and Management Charter - Foundations of a collaborative business relationship</li><li>• Collaborative Working; Relationship performance management; integrated risk and enablement management, information sharing; and relationship administration</li></ul>
4:00 – 4:30 p.m.	Guest speaker

## DAY 2

8:00 – 8:30 a.m.	Breakfast
8:30 – 9:00 a.m.	Relationship Kickstart - Conversational and Emotional Intelligence, continued
9:00 – 12:00 p.m.	Implementation – Relationship Management Frameworks <ul style="list-style-type: none"><li>• Collaborative development and operationalization of Relationship Management Charters; SRS convergence and adaptation methodology</li></ul> Relationship Sourcing – Procurement of Collaborative Strategic Relationships <ul style="list-style-type: none"><li>• Relational contract assessment and procurement of strategic relationships in the public and private sectors</li></ul>
12:00 – 1:00 p.m.	Lunch
1:00 – 3:30 p.m.	<ul style="list-style-type: none"><li>• Strategic analysis and partner selection tools</li><li>• Interest-based problem-solving approach</li><li>• Creating a culture of collaboration and trust; managing the change</li><li>• Change management</li></ul>
3:30 – 4:00 p.m.	Guest speaker
4:00 – 4:30 p.m.	Closing remarks and takeaways

# Instructors & Facilitators

## **Andy Akrouche, MBA**

Andy is the executive lead for the KPMG-SRS Centre for Strategic Relationships, Managing Director of the Institute for Collaborative Working (ICW) Canada, 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, Architecture and Performance Management.

Andy, with over 35 years of experience, is acknowledged as the industry leader in developing and managing adaptive, dynamic public-private and public-public relationships in various industry verticals including Information Technology, Defence, Healthcare, EPC and Government. Andy and his team, helps organizations define and operationalise organization collaboration principles and transition project and program success from a circumstantial occurrence to a systemic and repeatable model. Andy delivers executive seminars and training programs on relationships management, relational or collaborative contracting management, outsourcing, ASD, commissioning and PPP and inter/intra-Government relationships management.

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

## **Tom Ring, MA**

Tom Ring is a strategic advisor with the Centre for Strategic Relationships and Collaborative Contracting. Tom retired from the Federal Public Service in 2015 after a career of nearly 40 years. In his last position before retirement, Tom served as Assistant Deputy Minister (Acquisitions) at Public Works and Government Services Canada (now PSPC). Prior to that he was the Assistant Deputy Minister (Public Affairs) at the Department of National Defence.

Tom holds an M.A. (War Studies) from the Royal Military College of Canada. He is a Senior Fellow at the University of Ottawa's Graduate School of Public and International Affairs, where he teaches Graduate level courses in Communications and Defence issues. He is also a Senior Fellow at the Canadian Global Affairs Institute.

## **Barbara Odenwald, MA**

Barbara is a passionate communications specialist and leadership consultant/coach with over 22 years' experience successfully building organizational capacity and facilitating professional/executive development. Her clients span the corporate, not-for-profit and public sectors. She works collaboratively with clients to identify needs at the leadership or team level, and to customize and deliver tools and content based on sound assessments and clear goal-setting.

With a passion for innovation, change management, effective collaboration and problem-solving, she helps people and organizations excel as life-long learners, innovators, sustainable learning organizations, and leaders in their industry. Barbara holds two degrees and certificates in her field from UBC and MIT, and is a Conversational Intelligence coach.

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

Monty is a senior advisor with the Centre for Strategic Relationships and Collaborative Contracting. Mr. Mukerji works with leading public and private organizations to establish and operationalize collaborative relationships. Monty served as 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 has over 35 years of experience managing complex programs provides coaching and mentoring to workshop participants during the workshop and the follow on certification process. 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.

# Contact us

For registration or more information about our training programs and services please contact us at [Relationships@srscan.com](mailto:Relationships@srscan.com) or call Andrew Bystrzycki at +1 613 700 7578. If you wish to discuss the program in greater detail, please call Andy Akrouche at SRS at +1 613 290 5921 or Clark Savolaine at KPMG at +1 416 777 3203.

