

# Strategic Relationships Management

## Relational Contracting and Collaborations Management Training and Certification Program February 7-9, 2024

### Training for achieving success in complex programs, business arrangements and diverse multi-stakeholder initiatives.

Research has shown that many complex programs, projects, and business arrangements requiring significant collaboration fall short of meeting stakeholder expectations. There is no shortage of evidence relating to unrealized expectations of what were once promising partnerships and business arrangements.

While many factors contribute to this shortfall, the problems almost always originate with rigid transactional orientation, poor value for money analysis, non-collaborative behavior, and inadequate oversight models of management. In short, and despite the industry's best efforts, the traditional planning and implementation management models have not eliminated the risks in complex projects and business arrangements.

The transactional model practiced today was built a century ago on principles of certainty that are no longer valid in today's increasingly volatile, uncertain, complex, and ambiguous business environment.

This training program introduces participants to a fresh new perspective and a proven systematic collaboration management model for achieving better outcomes at lower risk and cost in complex scenarios.

The methodology operationalizes ISO44001 and provides a flexible, highly collaborative, synergistic, and adaptive approach to establishing and managing strategic programs, complex projects, and business relationships.

This training program is delivered virtually by Strategic Relationships Solutions Inc. (SRS) and the Institute for Collaborative Working Canada.

Transforming collaboration from a mere intention to a highly effective, operationally integrated management model.

Contact us at [Relationships@srscan.com](mailto:Relationships@srscan.com)



# Program Summary

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

## Training for a Relational Approach

It is not a secret that most complex projects and business arrangements fail to meet stakeholder expectations. Research shows that the fundamental issues are rooted in many business arrangements being structured and managed as static “transactions” or “deals” that do not provide the agility and flexibility to respond to change, drive evolution, and sustain alignment and mutual value creation.

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 Relational Contracting and Collaborations Management Training Program provides participants with the essential knowledge to source, establish, and manage adaptive and collaborative business relationships that can take advantage of change and navigate through today's volatile, uncertain, and increasingly complex business environment.

This training program is delivered using a mix of short lectures, group discussions, and team-based casework spotlighting current complex relationships and collaborations in the public and private sectors.

## Who Should Attend

The program is recommended for public and private sector executives, partner/vendor relationship managers, business development executives, senior project managers, procurement officers, and anyone involved in significant collaboration activity.

This training program is crucial for capture and proposal managers challenged with developing and proposing “collaboration management plans” as part of the pursuit to win significant opportunities.

## 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 common 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 collaboration management and provide guidance for establishing relationship management plans with strategic partners, clients, and strategic suppliers.

## PMCD 3 Equivalency

In Canada, this course is deemed as an approved equivalency for the Department of National Defence – Canada (DND) PMCD 3 qualification requirement.



## Key Learnings

Through this training program, participants will gain knowledge and a deep 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 relationship 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
- How to create an environment of collaboration and trust
- How to achieve organizational alignment and enriched culture
- A practical approach and methodology for causing diffusion of collaborative behaviors across the stakeholder community
- Approaches for evaluating relationship and collaboration health, risk, strategy, fit, and capability to deliver project/program outcomes
- 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 develop adequate compensation and incentivization models to drive the correct behavior 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
- Collaborative Change and Transitions Management

## Certification

All participants will receive a Certificate of Completion in Strategic Relationships Management, Collaborative Working, and Relational Contracting.

Participants working in teams or as individuals who submit the completed casework report within 90 days and achieve a minimum score of 80% will receive a certificate in Relational Contracting and Collaborations Management (RCCM) at the Professional level. The Course includes an additional optional half-day certification support workshop.

## Key Takeaways

- Gaining a deep understanding of Relational/Collaborative Contracting, Collaborative working, and ISO 44001
- Learning how to develop and operationalize operationally integrated collaboration management frameworks that will facilitate the achievement of optimum outcomes
- Learning how to establish a trust-based relationship and create an enterprise culture of collaboration and alignment.



# Agenda: Three-Day Professional

## DAY 1 9:30 AM – 5:30 PM

- Module 1 Relationships Management Overview**
- Provide a macro-level overview of Relationships Management, Collaboration Systems, and Industry Trends
  - Discuss the central common issues in complex programs, projects, and business arrangements, as well as challenges and opportunities
- Module 2 Relationship Management and Collaboration Framework Reference Model**
- Introduction to Collaborative Relationships Management Frameworks
  - Relationship or Collaboration Management Charter - Foundations of a Collaborative Business Relationship
  - Defined Open Book – Pricing, Compensation, Incentivization, Mutual Value Creation, and Information Sharing

## DAY 2 9:30 AM – 5:30 PM

- Module 3 Implementation – Developing and Operationalizing Relationship Management and Collaboration Frameworks**
- Collaborative Convergence Process – The key to shifting the mindset and achieving optimum collaboration
  - Developing and operationalizing the ISO 44001 joint relationship charters and corporate relationship management plans
- Module 4 Implementation – Managing Relationships and Creating Mutual Value**
- Working in Teams – Collaborative Behaviours, Conversational and Emotional Intelligence
  - Relationship Performance Management, Continuous Improvement, Innovation, Integrated Risk Management, Enablement Management, Issues Management, Information Sharing, and Continuity Management
  - Introduction to interest-based negotiation, issue management and resolution
  - Continuous Value for Money Analysis

## DAY 3 9:30 AM – 5:30 PM

- Module 5 Internal Systems and Oversight – ISO 44001 CRMP**
- ISO 44001 Corporate Relationship Management Plan – Internal policies and systems to support effective collaboration and strategic relationship management
- Module 6 Relationship-Based Contracting Management (Relational Contracting)**
- Overview of standard sourcing models
  - Procurement Relational Assessment – Understanding to what degree structured collaboration is required
  - Relational Contracting Management – Outcome-centric sustainable procurement and partnering model
  - Strategic Fit Assessment with potential or existing partners
  - Enablement-based partner selection
- Module 7 Managing Transitions**
- Introduction to collaborative change and transition management
  - Managing cultures

15-minute breaks are planned for 11:30 AM and 3:30 PM, as well as a 45-minute break at 1:00 PM.  
All times listed above are in Eastern Time Zone.



# Instructors & Facilitators

Our Instructors and Facilitators include industry thought leaders and leading practitioners in collaboration, complex projects delivery and relationships management.



**Andy Akrouche, MBA**  
**Lead Instructor and**  
**Facilitator**

- Founding partner of Strategic Relationships Solutions Inc. (SRS), a knowledge-based strategic alignment, procurement, and relationships management firm in its 20th year, helping clients succeed in complex programs, projects, and modernization initiatives.
- Chair – Canadian ISO 44001 Committee, collaborative business relationship management.
- Managing Director – Institute for Collaborative Working Canada. ICW has been the driving force behind ISO 44001.
- Former VP of Operations Management Services at Digital Equipment Corporation – Identified the need for a new business relationship approach to sourcing, structuring, and managing business arrangements to achieve success.
- Member of the Canadian ISO mirror committee on IT governance, ITSM, Business Process Outsourcing and Architecture and Performance Management.
- Executive Director of the SRS Centre for Collaborative Stakeholder Relationships. The Centre provides thought leadership, advisory, and implementation support services for complex programs, projects, and multi-stakeholder business arrangements.
- Author of “Relationships First: The New Relationship Paradigm in Contracting” Third Edition 2017.
- Andy delivers executive seminars and training programs on ISO 44001, Relationships Management, Collaborative Working, Relationship-sourcing and Collaborative Contracting, Outsourcing, ASD, Commissioning, and PPP Management.
- Andy holds a Master’s degree in Business Administration from the University of Ottawa.



**Mario Lagrange,**  
**MS, PMP**

- Mario is a strategic advisor with Strategic Relationships Solutions Inc. with over 39 years of combined experience at the Department of National Defence in aerospace engineering, defense procurement, commissioning, in-service support delivery, project management, organizational relationships management, material acquisition, and program sustainment.
- In the past few years, Mario has been the co-lead on several engagements where he and the SRS team developed and operationalized significant relationship management and collaboration frameworks.
- Mario holds a Master's degree from Royal Military College and a Master of Applied Science (Aerodynamics) degree from the University of Toronto. He is a Flight Test Engineer graduate of the US Air Force Test Pilot School. A Professional Engineer and a Project Management Professional. Mario sits on the Council of the Canadian Aeronautic and Space Institute.



**Ian Mack, CMM, CD**

- Naval career in the Royal Canadian Navy (RCN) for 38 years, retiring as Rear-Admiral.
- Has experience in uniform in every aspect of the lifecycle management of naval systems based on early employment and senior appointments as Head of Navy Training, Assistant/Deputy to the Commander of the Navy, Defence Attaché to the United States, and Chief of Staff of the Department of Defence Materiel Group.
- As a Director-General and Public Servant for a decade, he guided Project Managers in acquiring complex platforms (ships for the RCN and armored and logistics vehicles for the Canadian Army) and the competence development initiative for Project Managers.
- Was intimately involved in shaping and implementing Canada's National Shipbuilding Strategy, providing him an understanding of the challenges of developing a program of national scope and strategic importance.
- Has developed and employed advanced models of procurement/contracting.
- Focuses on researching best practices and relevant details to inform strategic perspectives when addressing problems.
- Well informed on governance as a critical enabler to successful complex project execution.
- Convinced of the importance of creating and sustaining a collaborative relationship amongst all stakeholders as THE critical enabler to delivering optimal outcomes in complex endeavours.

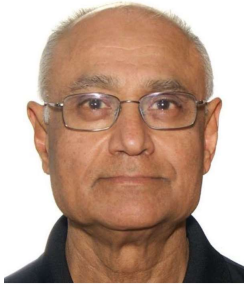
# Instructors & Facilitators

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**Eric Bloom**  
Lead Instructor and  
Facilitator

- Founder and Executive Director of the IT Management and Leadership Institute.
- Founder and president of OfficeInfluence.com.
- Amazon #1 bestselling author of the book “Productivity Driven Success: Hidden Secrets of Organizational Efficiency.”
- Author of the books “Office Influence: Get What You Want from the Mailroom to the Boardroom” and “Manager Mechanics: Tips and Advice for First Time Managers.”
- Former nationally syndicated columnist, CIO.com contributor, ITworld.com contributor.
- Certified Professional Coach.
- Certified Professional Speaker (CSP) and Virtual Certified Speaker (VCS).
- Past President of National Speakers Association (NSA) New England.
- IDC Research Advisor.
- He is also a recognized thought leader in maximizing the value of technical skill and knowledge through enhanced interpersonal communication, emotional intelligence, and influence.



**Monty Mukerji, MBA, PMP**

- Monty works with leading public and private organizations to establish and operationalize collaborative relationships. Monty was Senior Director of the Public Works and Government Services Canada's (PWGSC) Acquisitions Branch. During that time, he enabled multi-billion-dollar defense and information technology systems for major Crown projects.
- Monty has over 35 years of experience managing complex programs. Monty is a certified Project Management Professional and 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.



**Barbara Odenwald, MA**

- Barbara is a passionate leadership coach and communications specialist with over 22 years of experience 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 opportunities at the leadership or team level 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.

## Contact us

For more information about our programs and services, please contact us at [Relationships@srscan.com](mailto:Relationships@srscan.com) or Andy Akrouche directly at +1 613-290-5921 and [andy.akrouche@srscan.com](mailto:andy.akrouche@srscan.com)