

## Getting Project Results Through Contract Resources

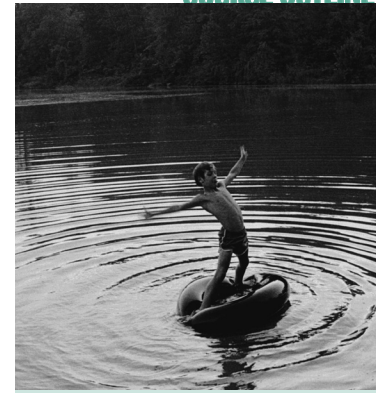
The Systemation approach hinges on the philosophy that project management processes and tools are only as effective as the people that use them. Unfortunately, the right resources are not always available within the company, and sooner or later most team leaders will find themselves having to look outside the organization for project support. This workshop walks participants through all phases of the procurement process, giving them the skills needed to effectively contract outside resources while avoiding potential traps and pitfalls. It also covers information concerning organizational planning and staff acquisition that is critical to obtaining the right people.

### FEATURES

- Our facilitators bring real-world experience to every workshop.
- Participants will be led, not lectured, through a combination of presentations and hands-on exercises.
- Our workshops provide an experiential environment where participants can take risks and make adjustments based on their results before approaching large projects.
- Our workshop is consistent with the Project Management Institute's *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*.  
PMBOK is a registered mark of the Project Management Institute, Inc.

### DISCOVER HOW TO

- Effectively staff the project.
- Use the procurement process as a method for accomplishing project objectives.
- Write an effective statement of work avoiding traps that doom many procurement efforts.
- Select the best contractor for the work that needs to be done.
- Analyze and assess a proposed contract to identify potential problem areas.
- Ensure the right elements are in place to effectively control a vendor's work.



**DURATION:**  
Traditional - 2 days.  
Virtual - 16 hours.

**CAPACITY:** 20 people.

**WHO SHOULD ATTEND:** those working on a project who will be going outside their company for support during the project life cycle.

**PREREQUISITES:** none.

**PDUs:** 16 credits.

## COMPETENCIES

Organizational planning  
Staff Acquisition  
Procurement Planning  
Solicitation Planning  
Solicitation  
Source Selection  
Contract Administration  
Contract Closeout

## PM KNOWLEDGE AREAS

Cost Management  
Quality Management  
Human Resource Management  
Procurement Management

## OUTLINE SUMMARY

### Organizational Planning

- Determining interfaces.
- Stakeholder analysis.
- Types of organizational strategies.
- Responsibility assignment matrix.
- Project organizational chart.
- Organizational planning exercise.

### Staff Acquisition

- Inputs to the process.
- Different approaches.
- Team directory.
- Staffing exercise.

### Procurement Management

- The project procurement process.
- The six elements of the process.
- How these elements integrate with the five project processes.
- Key definitions and terms.
- Buyer/seller concept.
- Six essential elements of a contract.
- Roles of stakeholders.

### Procurement Planning

- Key questions for procurement.
- Make-or-buy analysis.
- Defining the role of the seller.
- Getting the right people involved.
- When to start.
- Outputs of procurement planning.
- Procurement planning exercise.
- Make-or-buy exercise.

### Contract Pricing Approach

- Fixed price.
- Unit price.
- Cost sharing.
- Cost reimbursement.
- Time and materials.
- Type of contract pricing exercise.

### Statement of Work Preparation

- What is the statement of work (SOW)?
- Why do I need an SOW?
- What is the format for an SOW?
- How does the work breakdown structure (WBS) help in constructing the SOW?
- Editing statements of work exercise.

### Solicitation Planning

- Defining solicitation planning.
- Relating to a request for information, request for bids, request for proposal, and request for quotation?
- Key sections of an RFP.
- Determining sellers or bidders.
- Finalizing contract pricing.
- Preparing the solicitation plan
- Determining the evaluation criteria.
- Weighting the criteria.
- Developing evaluation statements.
- Evaluation criteria exercise.

### Solicitation

- What are the solicitation steps?
- Pre-solicitation meeting.
- Pre-proposal meeting.
- Timing requirements for proposal preparation.
- How many bidders are needed?
- Handling changes during solicitation.

### Source Selection

- Key activities.
- Sealed bid.
- Proposal evaluation.
- Key actions for source selection.
- Tips for a successful evaluation.
- Fundamentals of negotiation.
- Best practices for a negotiation.
- How to avoid upsetting the losers.
- Key output of source selection.
- Evaluating terms and conditions.

### Contract Administration

- Performance monitoring.
- Compliance with terms and conditions.
- Change management.
- Invoicing and payment.
- What to do in case of noncompliance.
- Termination of a contract.
- Contract administration exercise.
- Contract closeout.
- What is involved.
- Key activities.

**Sys·tem·a·tion®**

Get to the Heart of the Matter.®