

# FUNDAMENTALS IN WRITING SCOPES & KPIs

**Live Online Training Course: The Guide to Designing Best Practice Scopes & Key Performance Indicators**

This intensive course takes you through the high-level issues and solutions down to the detailed ones, with practical application, so that quotations are accurate, differing interpretations are few, management can be efficient, and performance is driven to the right result.

<b>April 2021</b>	Course Parts will commence at <b>10:00</b> and end at <b>14:00 (AEST)</b> . There will be short breaks during each course Part.
Part 1: <b>20<sup>th</sup> April</b>	Part 2: <b>21<sup>st</sup> April</b> Part 3: <b>27<sup>th</sup> April</b> Part 4: <b>28<sup>th</sup> April</b>
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**Our Expert Course Instructor**



**Dr Sara Cullen**

With over 30 years of experience, Dr Cullen is a contracts expert having negotiated over \$18 billion of contracts in various industries in Australia and globally. Sara has trained over 6300 professionals worldwide and published 19 books and 126 papers.

## Key Learning Objectives

- ▶ Appreciate why the scope is the most important part of the contract
- ▶ Gain practical experience writing each part of a scope through worked examples – paying close attention to appropriate structure, clear responsibilities and the right language
- ▶ Learn how to write up KPIs that will work in practice
- ▶ Explore the financial and non-financial means to drive KPIs
- ▶ Identify how to critique any scope and KPI, and fix it
- ▶ Critique and improve one of your own scopes and KPIs throughout the course
- ▶ Have your scope and KPIs reviewed for good practice and obtain feedback

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## ABOUT THE COURSE

The scope is one of, if not, the most important documents to form and manage contracts. If it is vague, difficult to use, or overly complex (or overly simplistic), its value is severely compromised – for both parties to a contract.

This course takes you through the high-level issues and solutions down to the detailed ones. First, we examine a dispute to assess the role of the scope and KPIs in allowing two parties to form two completely different views.

We then dedicate a significant portion the course to writing a scope, and related KPIs, that are clear and dispute-proof. We pay close attention to ensuring appropriate structure, clear responsibilities, and the right language. The financial and non-financial means to drive good performance are explored in detail.

Throughout the two days, there are numerous examples of good and bad practice that we compare. By the end of the course, you'll be able to pass or fail scopes and KPIs in seconds.

**Note:** You must bring in a scope and KPI that you have written, need to review, or need to manage. We exchange these in the class and analyse them so that you have a much-improved one for the future.

## WHO WILL BENEFIT

An elective in our contract management CMP series, this practical course is designed to benefit professionals who are responsible for developing or reviewing scopes, SoWs, specifications, and SLAs along with the related performance measures.

Subject matter experts, such as Engineers and technical people, and category managers/specialists will particularly benefit from this program. It has also been popular with members of the legal fraternity who are expanding their contribution beyond the contract terms and conditions.

## EXPERT COURSE INSTRUCTOR



### Dr Sara Cullen

Sara is the Founder and Managing Director of The Cullen Group, a specialist organisation offering consulting, training, and publications regarding commercial agreements. She is also a Fellow at the University of Melbourne and an Associate at the London School of Economics. Previously she was a National Partner at Deloitte in Australia.

Dr. Cullen specialises in the design, negotiation, and management of commercial agreements. She has consulted to 149 commercial and government sector organisations, spanning 51 countries, in comprising \$18 billion in contract value. She has facilitated contracts in a large variety of organisational areas including call centres, claims mgmt, construction, facilities mgmt, finance, food services, HR, logistics, IT, maintenance, recreational services, sales, and security. She has designed partnering arrangements, franchise-type agreements, shared risk/reward structures and incentive programs as well as traditional arrangements.

Dr. Cullen is a widely published author. She has written 19 books and 126 best practice and research publications. She has been featured in such publications as the Australian Financial Review, BRW, the Bulletin, Directions in Government, European Journal of Information Systems, Information Economics Journal, Insurance Directions, Oxford Handbook, Outlook India, and Strategic Asset Management. Her expertise is globally recognised and she performs peer reviews regarding outsourcing research for the Harvard Business Review, California Management Review, and IEEE Transactions on Engineering Management. Dr. Cullen lectures at many universities including Melbourne, Monash, Swinburne, QUT, RMIT, Seoul and the Australian Defence Force Academy.

Dr. Cullen earned her PhD in the area of contracting from the University of Melbourne, she was awarded a Masters of Management from Melbourne Business School, and obtained a BSc in accounting from St. Cloud State University (US). She is also a Chartered Accountant (US), and a Certified Mediator.

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## Course Outline

### Understanding the importance of the scope

- Statistics from the field
- The specification's role in the contract
- Understanding the lifecycle and bargaining power – shortcuts are playing with fire

#### Exercise:

- You decide this dispute (about a scope and the KPIs)

### Drafting the scope

- The importance of words – why they matter, getting rid of 'weasel words' / ambiguity
- Responsibility Matrix – know who is to do what
- Glossary (reserved words / defined terms)
- Scope writing – avoid misinterpretations and make it easy to use

### Scope exercises

- Warm up – a bit of practice
- Banned words and a word hunt
- Responsibility table – case work
- Glossary definitions – case work
- Detailed work specifications – case work

### Performance specifications (KPIs)

- Brief overview of the Contract Scorecard – a holistic view of performance
- Performance measures – how you will measure success and failure
- Recourse / reward schemes – what you will do about good / bad KPI performance

### KPI exercises

- Assess a KPI – case work
- Prepare good KPIs – case work
- KPI recourse / reward schemes you've seen
- Prepare a KPI scheme that will work – case work

### Apply what you've learnt – assess each other's specifications

#### Exercise:

- Apply what you've learnt – assess each other's scope s and KPIs (note: bring one of yours in). Does it pass good practice?

### Wrap up and evaluation

## WHAT OUR CLIENTS SAY

*"The group discussions were relevant and very interesting. Appreciate the extra reading material -was very valuable. I now have the confidence to ask the relevant questions."*

Principal Procurement Officer, **Public Safety Business Agency**

*"Very interesting insights. Fantastic presentation. Great practical commercially focused course."*

Legal, **Monash University**

*"Trainer was very engaging, informative and friendly. She made us feel comfortable to ask questions."*

Category Analyst, **Work Safe**

*"Excellent understanding of content and very engaging."*

Senior Consultant, **Downer**



## Would You Like To Run This Course On-Site?

### Informa Corporate Learning: On-site & Customised Training

If you have **8+** interested people, an onsite course can be an ideal solution. Speak with **Anton Long** or **Holly Baldwin** on **+61 (02) 9080 4455** to discuss your customised learning solution, or email [training@informa.com.au](mailto:training@informa.com.au)

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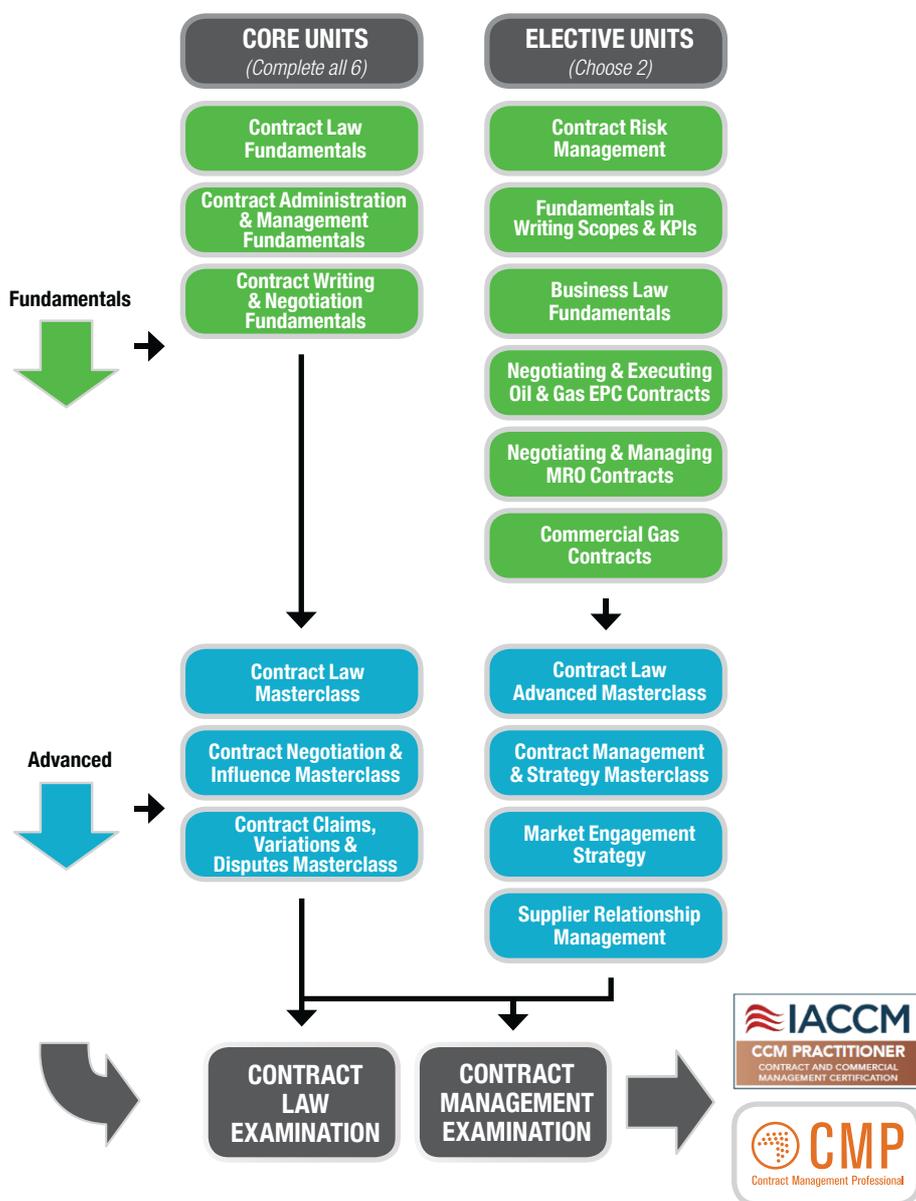
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## THE CMP CERTIFICATION FRAMEWORK

The CMP provides a robust method of up-skilling and recognising an individual's expertise and experience in contract management and procurement. Our combination of in-class teaching, facilitation, knowledge based testing and workplace evidence based examinations has been carefully crafted to not only teach knowledge and skills, but to also demonstrate how individuals can apply their knowledge to work based situations. This Certification is recognised by IIBT and IACCM.

Contact us to see how we can help you:

Visit [www.informa.com.au/training](http://www.informa.com.au/training), email [training@informa.com.au](mailto:training@informa.com.au) or phone **+61 (02) 9080 4395**



Informa Corporate Learning is a Learning Partner of the International Association for Contract and Commercial Management (IACCM), which promotes the international standards and practices for defining and managing trading relationships.

### ABOUT IIBT



The International Institute of Business & Technology Aust (IIBT) is a highly respected,

Government approved, Australian provider of higher education and VET programs. Their suite of programs includes a University level **Diploma of Business Administration**, equivalent to the first year of a business related undergraduate degree at Australian Universities. [www.iibt.wa.edu.au](http://www.iibt.wa.edu.au)

### THE IIBT / INFORMA CORPORATE LEARNING ALLIANCE

IIBT and Informa Corporate Learning joined together to provide a pathway for those who complete Informa's CMP at the Master level. All CMP Masters will receive Recognised Prior Learning (RPL): 2 units of credit in the 12 month, Higher Education, University level Diploma of Business Administration.

- Business Law (BL101)
- Management in Organisations (MGT101)

**\*This is a Higher Education Diploma equivalent to first year university NOT a Vocational Education Diploma.**

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## Easy Ways to Register

**1 Web**  
www.informa.com.au/writingscopes

**2 Telephone**  
+61 (02) 9080 4395

**3 Email**  
training@informa.com.au

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## Fundamentals in Writing Scopes & KPIS

Course Code	Location	Course Parts	Month	Standard Price		4+ Dels Discount
P21GL07SYV	Live Online Training	All 4 Parts	April 21	\$2,076 + \$207.60 GST	<b>\$2,283.60</b>	<b>Great Savings:</b> When you book <b>4 or more</b> participants! <b>Call us</b> today on <b>+61 (2) 9080 4395</b> or email <a href="mailto:training@informa.com.au">training@informa.com.au</a> to take advantage of the discount offer.
P21GL07PEV	Live Online Training	All 4 Parts	July 21	\$2,076 + \$207.60 GST	<b>\$2,283.60</b>	
P21GL07SY02V	Live Online Training	All 4 Parts	August 21	\$2,076 + \$207.60 GST	<b>\$2,283.60</b>	

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## Informa Corporate Learning – On-site & Customised Training

Informa Corporate Learning has a long-standing track record of delivering very successful customised learning solutions achieving real and measurable value for our clients through our senior training consultants.

If you have 8+ interested people, an on-site course can be the ideal solution – giving you the opportunity to customise our course content to your specific training needs, as well as attracting significant savings compared to public course costs.

### Why Choose On-site With Informa Corporate Learning?

- 1. Custom design** – Together, we will identify the best blended learning solution for your culture, your people and your training objectives.
- 2. Quality Assured** – We design market-leading training programs, concepts and methodologies, with a 400+ course portfolio. Our rigorously selected 900+ instructor faculty are recognised experts in their field. Quality of their content and delivery methods is assured through continuous monitoring and evolution.
- 3. On-site training** is a cost effective way to train your people and achieve your defined outcomes.

### Our Long Standing Clients Include:

ActewAGL, Ajilon, Ambulance Victoria,, ANU, Arrow Energy, Australian Super, Barrick, BHP, Chevron Australia, Coffey International, ConocoPhillips, CSIRO, Dalrymple Bay Coal Terminal, Department of Education, Department of Planning, Electricity Generating Authority of Thailand (EGAT), ENI Australia, EY, Fortescue Metals Group, Health Purchasing Victoria, IBM, IP Australia, Jemena, Litmus Group, Metro Trains, Office of the National Rail Safety Regulator, Origin Energy, Pacific National, PT Freeport, Public Transport Authority – WA, QGC – BG Group, Queensland Rail, Rio Tinto, Romgaz, SA, South Australia Health, Telstra, Transport & Infrastructure, UBS, Woodside and more...

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