



PARTNER WITH  
**Supply Chain  
Excellence**

National Institute of  
**SUPPLY CHAIN  
LEADERS** 

*(formerly operating as SCMAO or SCMABC)*

**NISCL.CA**



# PARTNER WITH Supply Chain Excellence

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# CSCL<sup>\*</sup> MODULES

Modules emphasize on technical foundation required for supply chain management profession.

Readings are drawn from current literature and are continuously updated to include leading-edge concepts. These self-paced modules with instructor support enable you to study at your own convenience.

\*(in addition to CSCMP Designation with the intent to replace it)

## MODULE 1

# Foundations of Supply Chain Management

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## 13 WEEK ONLINE COURSE

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A supply chain is a system or network of individuals, organizations, resources, and technology, that produce and deliver products and services to end users. The supply chain is the end-to-end process from the delivery of raw materials to all aspects of the production process, including information which ultimately delivers a finished product.

Supply chain management (SCM) is managing the flows of goods or services – starting from the delivery of raw materials to all aspects of the production process, including information which ultimately delivers a finished product. It involves:

- Supporting enterprise strategic objectives
- Maximizing customer value and
- Gaining a competitive advantage in the marketplace

The goal of this module is to have candidates recognize the critical, strategic, and dynamic nature of SCM. This module lays the foundation for the remaining modules and workshops in the CSCL program.

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Analyze and discuss case studies to produce case study reports using the standard case study method.
  - Implement strategic supply chain analysis tools.
  - Apply and produce mapping tools to describe and analyze supply chains.
  - Apply and analyze modules to measure supply chain performance using balanced score cards.
  - Recognize continuous improvement opportunities.
  - Review and compare inter-organizational information systems (IOIS).
  - Identify and describe supply chain risk.
  - Recognize the role of supply chains in terms of social responsibility.
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## MODULE 2

# Procurement Strategy and Supply Management

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## 13 WEEK ONLINE COURSE

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Procurement is the process of obtaining or purchasing goods or services by an organization. The procurement process, when managed well, can help increase the business's profitability.

The goal of this module is for candidates to better understand the strategic role of procurement, as well as tactical approaches that support the strategy. It will cover the steps of the procurement process, defining spend analysis, use of competitive bidding and negotiation, conducting price and cost analysis, conducting supplier selection and building a supplier performance program.

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Distinguish between tactical and strategic procurement strategies.
  - Examine the relationship between procurement and other functional areas in an organization.
  - Design procurement strategies keeping in mind a number of factors like purchase timeline, available budget, total cost of ownership, risks, and more.
  - Develop and apply tactics to support a procurement strategy, including cost analysis, total quality management, supplier selection & performance, and implementation of e-procurement.
  - Understand and explain the importance of purchasing services and examine the critical elements of statement of work.
  - Explore and decide on tactical methods to improve efficiency of the procurement process of your organization.
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## MODULE 3

# Inventory, Logistics Management and Transportation

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## 13 WEEK ONLINE COURSE

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Logistics is the process and coordination of products, raw materials, and services across the supply chain. From manufacturing to production, to warehousing, distribution, inventory management and the final delivery to customers logistics is a critical and essential component of supply chain.

The focus of this module is on identifying and evaluating strategic logistics issues, creating customer service measures as they pertain to logistics, selecting inventory strategies and its management. It also covers the role of transportation and warehousing fundamentals as well as managing logistics risk.

A computer simulation included in this module requires candidates to apply concepts and tools learned throughout this module.

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Analyze strategic logistics issues across stages of product life cycle.
  - Understand and recommend location alternatives after weighing the various global business trends.
  - Design a customer service improvement plan as it relates to logistics.
  - Evaluate categories of inventory and identify costs.
  - Evaluate the importance of order and demand management and potential of Collaborative Planning, Forecasting and Replenishment (CPFR).
  - Evaluate critical elements of logistics.
  - Investigate and leverage the various 3PL providers.
  - Analyze and recommend improvements for reverse logistics.
  - Understand and implement strategies for managing logistics risks.
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## MODULE 4

# Operations and Process Design Management

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## 13 WEEK ONLINE COURSE

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Operations and process management is the administration of business practices to create the highest level of efficiency possible. It is concerned with management of direct resources and value-added activities that transform inputs like, material and labour into outputs (goods and services) efficiently to maximize profits.

The aim of this module is to introduce you to the fundamental concepts of operations management. It will introduce you to capacity, process flow & bottlenecks and how to manage it. The module explains the concept of six sigma and lean. It will also cover the concepts of project planning and important elements of product design.

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Explain how organizational strategy ties back to operations.
  - Identify and describe the relationships between capacity, process flow, bottlenecks, and inventory.
  - Apply technology tools to eliminate bottlenecks and improve performance.
  - Describe the concept of six sigma.
  - Interpret the basic elements of a lean production system (e.g., the Toyota Production System), value-added activity and elimination of waste in the system.
  - Articulate the project planning process, understand the concept of critical path, develop a network diagram, and use this to solve project-related problems.
  - Discuss the elements of product design and how to productively influence design including the management of the prototyping and innovation process.
  - Understand S&OP and Demand planning and its impact on operational activities.
  - Identify and recommend a cost reduction strategy.
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## MODULE 5

# Knowledge Management

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### 7 WEEK ONLINE COURSE

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Knowledge management is the process of identifying, gathering, storing and disseminating knowledge within an organization. Collective knowledge of the organization can lead to competitive advantage and better operational efficiencies.

The goal of this module is to help candidate understand what knowledge management is, where and how it should be applied and the challenges that go along with implementing knowledge management systems.

This module prepares candidate for assessing the knowledge management systems in their own organizations and making recommendations for improvements in those systems.

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### KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Define knowledge management systems and discuss its importance within supply chain operations.
  - Understand knowledge management strategies and the steps in lifecycle of Knowledge Management Systems.
  - Develop a knowledge management strategy for their organization.
  - Define business intelligence and explain the common drivers of data mining.
  - Describe key characteristics required to safeguard against the security risks.
  - Understand organizational change management.
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## MODULE 6

# Global Strategic Sourcing

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### 7 WEEK ONLINE COURSE

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Strategic sourcing is a process by which information is gathered and used by an organization to consolidate its purchasing power to source for best values and align its purchasing strategy to business goals. It places emphasis on total cost of ownership and optimizing the sourcing process by building relationships with suppliers.

The goal of this module is to identify benefits and challenges in global sourcing, understanding the difference between outsourcing versus offshoring, recognizing social issues when it comes to low-cost countries sourcing. It will also cover operational strategies in global sourcing and managing risk exposures.

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### KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Understand issues of the global sourcing environment, such as barriers and facilitators to global sourcing.
  - Identify and discuss critical business and social issues of sourcing from low-cost countries, including child labour and countertrade.
  - Identify financial risks and techniques used to mitigate risks in an international trade deal.
  - Explore the different trade agreements including NAFTA and USMCA.
  - Discuss intellectual property and threats to it, including piracy and counterfeit goods and understand the significance of corruption in supply chains.
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## MODULE 7

# Public Sector Supply Chain Management

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### 7 WEEK ONLINE COURSE

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In the public sector, supply chain management refers to coordination of all parties involved in delivering a combination of inputs, outputs or outcomes that will meet a specified public sector requirement. It is an integral part of financial management, at the same time addressing government's procurement policy objectives.

The goal of this module is to understand the differences between public and private sectors, how each stakeholder can be managed in the public sector, understand the challenges at different levels of public sector and how they can be managed.

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### KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Identify the various stakeholders in the public sector.
  - Understand the different characteristics of supply chain management in public sector vs private sector.
  - Explain the rationale for the use of competitive bidding in the public sector.
  - Identify the conditions for when it is appropriate to use each of the various options for sourcing goods and services.
  - Describe the various components and importance of procurement strategy.
  - Develop an understanding of the components and importance of incorporating social responsibility requirements in procuring goods and services.
  - Describe the use of e-procurement in the public sector.
  - Identify and describe the implications of ethics in the public sector.
  - Describe the unique challenges of procurement in different forms of the public sector.
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## MODULE 8

# Major Projects, Capital Goods, and Services

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## 7 WEEK ONLINE COURSE

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Supply chain's role on the growth of the service and capital goods industry has been rapidly evolving with profound attention worldwide.

The goal of this module is to focus on how the services and goods industries are intertwined into every supply chain model, with the services component outgrowing the goods when it comes to revenue generation and to build a stronger grasp of escalating economic momentum in supply chain project management.

Topics covered include the ability to identify the underlying risks and develop effective strategies for both service sector and large projects supply chain management, the process to manage supply chain management service delivery effectively and build an understanding for any associated hinderances. Additionally, the topic of capital procurement is covered along with its relation to major project management and project management.

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Define services, capital goods, and major projects.
  - Define growth in the services sector and the need for performance optimization.
  - Describe the differences and similarities in the capital equipment acquisition process relative to normal operating goods.
  - Analyze capital goods investment by understanding present value concept and total cost of ownership.
  - Understand the process of project management for large projects, and the impact on the supply chain.
  - Describe issues related to asset disposal and asset recovery.
  - Discover emerging trends in supply chain management of major projects.
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# CSCCL<sup>\*</sup> WORKSHOPS

The instructor-led workshops deliver high-level management and general business skills.

Facilitated by instructors and highly collaborative by nature, workshops involve a combination of individual and group exercises.

\*(in addition to CSCMP Designation with the intent to replace it)

# Effective Leadership

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## 2 DAY WORKSHOP

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While leadership involves the ability to inspire, motivate, and guide others towards a common goal, a professional leader is one who exhibits the ability to lead by example, demonstrate ethical behavior, and create a positive work environment, all while encouraging growth and development.

The goal of this workshop is to provide CSCL candidates with both theoretical concepts and practical techniques that address leadership and professionalism in the workplace. The discussions, case studies, activities, and videos, explored throughout the two-day workshop will demonstrate the interchangeable relationship between the two concepts.

The Leadership and Professionalism workshop draws from the works of highly credible “thought leaders” in the areas of leadership, management, and human relations.

The candidates will be required to prepare a critique of their personal leadership style as the workshop’s final assignment. The final assignment is due one week after the end of the workshop. Candidates must attend the workshop and participate in all workshop activities prior to submitting the final assignment..

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Differentiate between Management and Leadership.
  - Identify Leadership Styles and Theories.
  - Complete DISC Assessment.
  - Explore best practices in vision and mission statement development.
  - Develop ways to build, lead and inspire cohesive teams.
  - Determine the right approach in handling workplace conflicts.
  - Identify critical steps within the change management process.
  - Recognize interrelation of Leadership and Professionalism.
  - Showcase Supply Chain Leader Trailblazers.
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# The Art of Negotiation

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## 2 DAY WORKSHOP

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The goal of this workshop is to provide the CSCL candidates with the theoretical concepts and practical methods and techniques to help them develop their negotiation skills. This workshop focuses on assessing your own and the other party's negotiating skills, differentiating between distributive and integrative negotiation; establishing trust and building relationships; and addressing the concepts of power, persuasion, and ethics in negotiations.

Whether the candidates deal externally with vendors or internally with various corporate stakeholders, negotiating effectively requires the ability to understand the parties' positions, motivations, and purpose, to move away from conflict and toward collaboration.

In this dynamic and interactive workshop, the candidates will acquire proven skills for maximizing the value of your negotiation through custom simulations ranging from pricing, contract terms and conditions, and licensing to international, domestic, public, and private disputes.

The candidates will acquire a set of strategies that can be used to deal with difficult negotiation behaviours and hard-bargaining tactics.

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Describe the importance of trust and persuasion in negotiations.
  - Explain the role of emotional intelligence and conflict resolution in negotiation.
  - Identify and remove obstacles to integrative negotiation in the buyer-supplier context.
  - Develop primary negotiation skills needed to establish negotiation targets, and reservation points, and develop a BATNA.
  - Summarize the six phases of the negotiating process (preparation, opening, testing, moving, conclusion, evaluation) and the role they play in the negotiation process.
  - Recognize and apply sources of power in negotiation.
  - Define the role of the cultural context in negotiations.
  - Identify e-negotiations' advantages and shortcomings.
  - Distinguish between ethical and unethical negotiation practices.
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# The Importance of Communication

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## 2 DAY WORKSHOP

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Supply Chain Management professionals manage change while leading groups of people. However, to successfully perform these duties, professionals must rely on their abilities to communicate effectively and with purpose. The objectives of this workshop are (1) to help candidates develop both oral and written communication skills, and (2) to learn how their relational skills, also known as soft skills, carry equal, if not more relevance in today's professional landscape.

This workshop focuses on how effective communication and relational skills can be used to support strategic issues identified throughout the supply chain. In particular, and essential to supply chain professionals are competencies such as listening skills, spoken and written communication, persuasiveness and lastly, the ability to understand and explain complex issues to their teams, partners, and customers throughout the supply chain.

The workshop will provide candidates with the opportunity to improve their own communication and relational skills in a highly interactive learning environment..

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Define communication skills and relational skills, and how the two relate.
  - Understand the importance of internal and external communication.
  - Learn how to communicate strategically when dealing with vendors.
  - Understand how learning styles affect the way we communicate.
  - Refine key communications methods, tools, objectives, structures, presentation skills.
  - Understand how media influences the way we communicate.
  - Receive and process constructive feedback using key communication skills.
  - Understand key inter-relational dynamics and techniques used in information sharing, persuasion, negotiation, meetings, presentations, and difficult discussions.
  - Understand contemporary factors impacting virtual offices and teams.
  - Develop new relationship-building skills to build professional career.
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# Contract Management and Competitive Bidding

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## 2 DAY WORKSHOP

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The goal of this workshop is to provide supply chain professionals with information and skills required to manage the bidding and contracting processes.

This workshop focuses on practical matters in bidding and contracting, including drafting of competitive bidding documentation, application of competitive bidding law, the basics of contract formation and good practices in contract management.

Candidates will have an opportunity to apply knowledge of good practices in competitive bidding to a “challenge scenario,” with a view to realizing preventative and remedial solutions.

The final project will offer candidates the opportunity to create a quality RFP, test their RFP drafting skills and then benefit from expert feedback from the instructor.

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Understand competitive bidding activities and best practices.
  - Read/write competitive bidding documents (RFQ and RFP).
  - Understand the foundations and implications of Canadian competitive bidding law.
  - Understand the implications of Canadian inter-provincial and international trade agreements for competitive bidding activities in the public sector.
  - Understand the implications of the United Nations Convention on Contracts for the International Sale of Goods (CISG) on contracting activities in Canada.
  - Understand how contracts are formed, and how to form contracts in a manner that avoids introducing uncertainty into their formation and later operation.
  - Understand the component parts of processes for contract administration and management.
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# Risk Management

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## 2 DAY WORKSHOP

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The goal of this workshop is to provide the CSCL candidates with the theoretical concepts and practical methods and techniques to help develop their risk management skills.

Risk management is a corporate strategic initiative. To ensure a resilient supply chain, identifying potential risks and planning risk mitigation is paramount. Risk Management requires the integration of people, technology, information, and resources both internal and external to the organization.

The focus of this workshop is on risk identification, assessment, mitigation, and management. Various tools will be introduced, and candidates will get an opportunity to apply these tools in their own organizations.

For the final assignment, candidates will be asked to prepare a risk management program for their organization. The final assignment is due one week after the end of the workshop. Candidates must attend the workshop and participate in all workshop activities prior to submitting the final project..

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Describe risk and risk management.
  - Define supply chain risk and apply the principles of supply chain risk management.
  - Analyze an organization's preparedness for risk management.
  - Apply the methods for identifying, quantifying, and mitigating risk.
  - Evaluate the strategies of dealing with risk, including acceptance, avoidance, mitigation, and transference and identify when to apply each strategy.
  - Develop a supply chain risk management strategy for an organization.
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# Ethics: Social & Environmental Responsibility

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## 2 DAY WORKSHOP

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The goal of this workshop is to provide the CSCL candidates with the theoretical concepts and practical methods and techniques to help them develop their ethical skills to confront the challenges in business and supply chain social responsibility.

Through videos, discussions, mini-cases and exercises, candidates will learn about ethics from a philosophical and practical perspective. They will learn how to address ethical dilemmas in personal and professional settings. They will study methods and processes to deal with various social responsibility factors and environmental concerns.

The candidates must prepare a critique of their organization's code of ethics as the workshop's final assignment. The final assignment is due one week after the end of the workshop. Candidates must attend the workshop and participate in all workshop activities prior to submitting the final project.

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Identify and contrast the different perspectives on ethics.
  - Define "business ethics" and determine how to solve business ethics dilemmas.
  - Analyze and improve an organizational code of ethics.
  - Identify the benefits of social corporate ethical conduct.
  - Explain the importance of environmental ethics in business.
  - Evaluate how ethics affects the economic, social, and environmental development in their communities.
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# PROFESSIONAL DEVELOPMENT SESSIONS

Excellence in continued supply chain education.

The supply chain landscape has never before been so dynamic. Continuous education has therefore become more important than ever. It is the best way to build new skill sets and gain expertise on subject matter that is pertinent to the industry. At NISCL, we manifest our three operational tenets of currency of content, speed to market and accessibility when we curate the topics for our professional development sessions.

# Supply Chain Analytics for Business Results

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## 10 – 2 HOUR SESSIONS

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Though the discipline of supply chain analytics has existed for many decades, the analytical models, data management, and software applications underpinning these analytics have evolved significantly. The way data is collected and used in SCM mean that enterprises are looking for professionals who can understand, analyze, and use the data for improved business performance. Supply Chain Talent of the Future: Findings from the Third Annual Supply Chain Survey, points out the need for SCM talent with different skill sets than what was needed in the past. A majority of supply chain executives as reported by Forbes consider big data analytics a “disruptive and important technology, setting the foundation for long-term change management in their organizations.”

Research by BCG found that Supply Chain Analytics can predict demand and cut inventory by 30% and increase fill rate by 7% which can increase margins by 1-2%. Deloitte says 79% of organizations with high performing supply chains are enabled by Supply Chain Analytics. An Accenture study revealed that 97% of executives understand Supply Chain Analytics can improve their supply chain.

The Supply Chain Analytics for a Business Results is a 20-hour live, virtual, and practical training delivered by Dr. Prashanth H Southeikal (profile below), Managing Principal of DBP-Institute. This training will equip participants with key data analytics concepts and skills across Supply Chain and Data analytics domains.

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## KEY TAKE-AWAYS

This training is designed for experienced Supply Chain Professionals and builds on one’s technical and managerial competencies. Participants will learn real life examples on how data analytics can be applied to various areas of supply chain from transportation, facilities, inventory, information, and procurement. This training has a strong focus on the application of data and insights for supply chain business performance. *This training has 3 key learning objectives.*

1. Understanding Data Analytics, Business Data and Business Systems.
2. Applying Data Analytics techniques, deriving insights, and communicating the insights derived to the business stakeholders.
3. Make good and quick decisions using the right Decision Science techniques.

*Upon completion of the course, candidates will be positioned on the following core competencies.*

1. Spot business opportunities and use-cases for data and analytics.
2. Improve the adoption of data and analytics solutions in the organization by collaborating with Business, IT, and Data teams based on proven best practices.
3. Improve technical competency and decision-making using data based on trade-off.

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This course is NOT designed for Under-grad Students or Entry level Programmer or aspiring Python Data Science Developer or a Talend ETL Data Engineer.

# Professional Services Procurement

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## 2 HALF-DAY SESSIONS

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This one-day workshop will provide an overview for building the framework, methodologies, strategies and tools required to procure professional services for your organization.

During the workshop, you will be provided an overview of how to procure professional services, a detailed review of contracting best practices for services, an assessment of the supplier transition process, and how to optimize the SRM engagement with service providers.

*The workshop is divided into four distinct units, which are as follows:*

1. Sourcing Professional Services
2. Contracting Professional Services
3. Supplier Transition Management
4. Supplier Relationship Management

The workshop is designed for those just starting their procurement career and for those more experienced professionals that want to learn about new methods and best practices for procuring service providers. Understanding the theory and practical application through real life examples will assist to reduce the risk and improve results in the onboarding of your service suppliers.

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## KEY TAKE-AWAYS

This workshop will teach you how you can implement industry best practices of managing and adopting new methodologies to make your procurement organization more efficient. A review of key technologies that can help to improve the way that you source, contract and manage your service providers will be provided. The potential of Supplier Relationship Management (SRM) technology lies in enabling the strategy, the processes, and the procurement organization.

*The workshop will predominantly focus on the following service categories*

- Facilities Services
- Construction/Engineering Services
- Professional Consulting Services
- General and Administrative Services

The practical understanding of the procurement process and how to onboard new service providers, manage them and transition them out of your organization will allow your organization to optimize its value proposition.

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# Project Management for Supply Chain Professionals

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## 4 HALF-DAY SESSIONS

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Supply chains have become ever more disrupted and organizational goals more flexible. As change accelerates for both the individuals and the organizations, they are a part of. Achieving organizational objective will require a different approach than a fixed set of resources executing upon the same activities year over year. Project management allows for agility in duration, resources, and execution. At its best it transcends the 'silo-ed' approach many organizations still use in solving problems and achieving objectives. If we leverage the best of the Project Management toolset objectives are met more quickly, challenges resolved more effectively, and more value created. This program will explore utilizing a project approach to generate incremental value and provide understanding of the fundamentals of project management.

Project success or failure has traditionally been based on and measured by performance against the triple constraint: on-scope, on-time, and on-budget. This framework has stood the test of time however often results in a failure to maximize value and sustainability. The breadth of stakeholder expectations and the increasing levels of in project change, negatively affect the realization of intended benefits and compromising client, customer or internal user satisfaction. In other words, since projects happen with and through people, leadership and soft skills – beyond the basics of project management – are needed to succeed.

This workshop begins with a section covering the fundamentals of project management, addressing the basic processes, knowledge areas, and criteria relevant to executing tasks on a project basis. It then progresses to cover a more comprehensive view of the factors driving project success and winning approaches to be successful. Typical project management frameworks, tools and templates are laid out with participants getting to practice execution live in a 'virtual break-out' setting. This includes understanding and working to the perspectives of different kinds of stakeholders (especially customers / clients / users), being (and staying) 'on-strategy', as well as working more effectively with the project team itself. It also takes highlights how project management is changing in the digital age and how project managers need to adapt to be successful in the years to come. The instructor will share insights and some practical tips from their own experience in leading small projects to large-scale, cross-functional transformation programs. There are a range of ideas and tools that you will be expected to apply to your organization to highlight key learning points and facilitate application within your own organization.

As a project leader, project team participant, sponsor, or key stakeholder, attend this workshop to learn about project and program management approaches that exceed expectations and the related soft skills required to take your discipline to the next level!

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## KEY TAKE-AWAYS

- Become familiar with the fundamentals of project management, including relevant processes, knowledge areas, terminology, tools, templates, and frameworks.
  - Acquire a comprehensive understanding of project success, key success factors and the stakeholder expectations management.
  - Understand when an objective can best be achieved through project management rather than more generic operations management.
  - Gain insight into the implications of project success factors in relation to effectiveness, benefits realization, project team health and customer satisfaction.
  - Utilizing exercises and selected tools to develop skills geared to working with various kinds of stakeholders and achieving high levels of project success – beyond the triple constraint!
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# Identifying and Managing Procurement Risks

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## 4 HALF-DAY SESSIONS

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Procurement risks are ever increasing considering the high value, increased size, scope and volume of procurements, complexity, stringent policies, rules, regulations and trade agreements. This workshop is developed to identify potential risks and provide practical tools and strategies to mitigate those risks.

This workshop is critical now more than ever as it is designed to address all facets of procurement risk and provides advice to identify, access, avoid, transfer and mitigate the supply chain challenges/risks in crisis times (e.g. Global Pandemic). How an outbreak of deadly disease happening at other part of the world would impact your supply chain and how you can protect your supply chain and address supply shortages and access to critical products and services.

Professionals involved in Supply Chain Activities make decisions and inherit a variety of risks while executing procurement projects involving a large amount of dollars. Are you aware of those risks and should you be taking those risks? And how to provide value added services to your organization by effectively mitigating procurement risks. Procurement professionals that understand risks, consequences and mitigation strategies are the leaders for supply chain. Procurement professionals are tasked to achieve cost-savings and conduct an open, fair and transparent procurement process. Do you realize that systematic identification and risk mitigation strategies significantly increases your chances of achieving those cost savings targets and meeting the fairness obligations?

This workshop will show you how to achieve those targets and provide you with comprehensive understanding of different types of risks at each stage of the procurement process. It will provide you with risk mitigation strategies, case studies, checklists and best practices.

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## KEY TAKE-AWAYS

- Overview of procurement stages: planning, developing specification, selecting appropriate procurement method, managing tendering process, evaluating bids, negotiations, contract management and close-out.
  - Understanding key procurement methods (Request for Proposal, Request for Tenders, Request for Information, Request for Prequalification).
  - Awareness of different type of potential risks (what could go wrong) in the procurement cycle (Policy, Process, Technical, Project Management, People, Legal, Finance, Fairness and Technology).
  - Supply chain risks management in the crisis times (e.g. Pandemic).
  - Standard payment terms, risks of lower credit limits and its impacts on workload, stockout, backorder, ordering cost and profit margin.
  - Process of identifying the unknown and known risks.
  - Accessing the impacts of potential risks.
  - Applying proven strategies/options to mitigate potential risks (Action Plan – when and how to avoid risks, assume risks or take a hybrid approach).
  - Strategies to improve the bottom-line (cost savings, cost overruns) and value-added services to your clients.
  - Case studies to apply the knowledge obtained in this workshop.
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# Information Technology Procurement and Related Contracting

## 4 HALF-DAY SESSIONS

Information Technology (IT) procurement can be complex, covers a broad range of IT acquisitions and is often associated with a relatively high failure rate. Whether you are procuring off-the-shelf software or a customized IT system/software, this interactive 2-day course will provide you with strategies to improve your IT procurement and contracting practices and avoid the most common pitfalls.

### PART 1 – IT PROCUREMENT

- Understand the challenges and key pitfalls in IT procurement
  - By exploring the challenges and key pitfalls in IT procurement you will increase your ability to run a better IT procurement process to maximize the value your organization receives
- Why do so many IT projects fail?
  - Learn from research studies, case studies and other sources why IT projects typically fail and capture the lessons learned to improve your IT procurement process
- Basic Terminology
  - Learn to navigate basic software and licensing terminology that will be used in the course
- Plan effectively to improve your IT procurement
  - Explore the use of an IT needs analysis and other key planning tools to ensure that you are prepared for going to market with your IT needs
- RFx Continuum
  - Find the best procurement fit on the RFx Continuum, look at innovative methodologies (such as Competitive Dialogue and Agile) and zero in on a methodology that fits your IT procurement needs and institutional practices
  - Review how CFTA can significantly impact the pre-RFx procurement process
- Explore strategies for success, such as
  - Review the components of an IT needs analysis and explore its impact on IT procurement
  - Build the right team
  - Examine due diligence as part of the procurement planning process
  - Use and development of a Statement of Work.
  - Deal with global suppliers
  - Explore and make effective use of practices that can be used in IT procurement – technical briefings, data room, proof of concept validation, demonstrations
  - Contain maintenance and other costs
  - Understand how performance measurements can assist
    - o Consider transition strategies upfront
  - Use of cyber liability insurance, certifications and standards
- Change Management
  - Learn how to establish a process that will ease the inevitable stress associated with change
- Moving your procurement process to contract
  - Examine strategies (such as negotiation and best and final offer (BAFO)) that can be embedded in your procurement process to finalize the contract

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## PART 2 – SELECTED IT CONTRACTING BASICS

- Overview of a simplified IT contractual framework
    - A multi-part IT contractual framework will be presented and explored based on Scope, Services, Risk Allocation, Contract Management and Exit Plans
  - Negotiating various contractual clauses
    - The concepts behind specific IT contracting clauses, in each area of the contractual framework presented, will be reviewed individually, for example, scope and grant of license, indemnification and related clauses, maintenance, and software escrow issues
  - Contracting tips
    - Acquire concrete tips for purchasing or licensing IT systems using the contractual framework presented, such as avoiding hedges concerning acceptance testing and warranties, service levels, audits and transitioning to a new supplier
  - Consideration of various matters when contracting for cloud computing services
  - Cloud Computing
  - Review and explore
    - What is cloud computing
    - Cloud computing models
    - Key cloud services – SaaS, PaaS, IaaS
    - Uses, benefits and risks
  - Selected licensing/contractual terms
  - SaaS v. On-Prem Software Agreements
    - Consider a comparison of various key provisions
  - Subscribing and evaluating SaaS
    - Review selected metrics for evaluating SaaS
    - Licensing models
    - Security and data protection
    - Integration requirements
    - Contractual terms and conditions
    - Financial and business considerations
    - Explore additional tips for subscribing for and evaluating for SaaS
  - Migration from On-Prem to cloud considerations
    - Given current technology adoption in cloud and SaaS type models, it is conceivable that during the lifetime of a contract a service provider may decide to move its customer base to from On-Prem to the cloud
    - Review some of the contractual considerations that would need to be addressed before such a move
    - Consideration of various matters when contracting for cloud computing services
  - Using a network agreement as part of the transaction
    - Review the critical importance of a network agreement and examine its individual components
  - Transitions During a Crisis
    - Look at the current environment and its impact on supply chains as a path to change
  - IT Transactions During a Crisis
    - In this current environment gain some insight to IT transactions by addressing some key clauses, risks and strategies
  - Considerations after signing the contract
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# Contract Management Strategies for Success

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## 4 HALF-DAY SESSIONS

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Organizations in both the public and private sectors are facing increasing pressure to reduce costs and improve financial and operational performance. Effective Contract Management, which is often overlooked and presents significant challenges is crucial to improving the financial bottom line, enhancing supplier relationship management, mitigating risk, optimizing operational performance and successful project completion.

While this seminar will look at contract development with a view to enhancing Contract Management, the focus of this course will be on the implementation, management and administration of a contract already in place. This seminar will focus on strategies for contract management programs and policies, performance measures, risk management, subcontractors, effective payment mechanisms and anticipating the unexpected such as contingency planning, escalation procedures and change management. In addition, strategies for dealing with topical IT concerns will be examined such as cybersecurity management and avoiding cybersecurity breaches that can impact a contract or project in place and pose significant contractual and organizational risks. The strategies presented have a wide application and will be useful in managing most types of contracts, including capital equipment, services, IT and goods.

This seminar combines a broad view of contract management and an integrated approach for you and your organization. Whether you are a procurement or project management professional, a contract specialist or administering contracts in your daily activities, this practical program will give you tools and tactics you need to deliver success for your organization.

The format for this seminar is interactive including review of practical take-away strategies, case studies, checklists and exercises that will assist you in dealing with your day to day contract issues. Ideally suited for anyone involved in creating or understanding contracts in both public and private sectors.

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## KEY TAKE-AWAYS

- Managing Supplier Relationships
  - Contract Formation
  - Everyday Management
  - Risk Assessment
  - The Unexpected
  - Effective and Secure Use of IT
  - Legal Framework
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# Drafting a Statement of Work

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## 2 HALF-DAY SESSIONS

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A Statement of Work ("SOW") can play a critical role in planning, procurement and contracting. A well developed SOW is at the heart of strategic procurement and contracting. This course reviews the importance and benefits of a SOW, legal and risk considerations, what makes an effective SOW and how your organization can benefit from an SOW. Participants will be provided with take-away strategies, a pro-forma SOW template that will be worked with during this interactive course and a tip sheet on drafting a SOW.

This course is designed for anyone involved in creating, understanding, implementing or responsible for drafting or using a Statement of Work.

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## KEY TAKE-AWAYS

- Why – Addressing Challenges
    - Addresses various challenges faced and why a SOW is as an effective solution for service delivery and contracting. Each of the following is explored
    - Describing the Work
    - Assumptions
    - Measuring Performance
    - Contract Management
    - Scope Creep
    - Minimizing Risk
  - Importance & Benefits
    - Examine key considerations regarding the importance & benefits of using an effective SOW
  - Inception of the SOW
    - Provides a short historical perspective and discussion of different types of SOWs
  - Understanding & Definitions
    - Look at various definitions of SOW and other related terminology
  - When to Write a SOW
    - At the Planning, RFx and Contract Stage
  - Legal and Risk Considerations
    - Look at selected legal and risk considerations in using a SOW at the Planning, RFx and Contract Stage
  - Components of a SOW
    - Review the components of a SOW – Introduction, Requirements, Contract Management
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# Capital Equipment Procurement and Contracting

## 4 HALF-DAY SESSIONS

Capital equipment procurement and contracting is often expensive, has significant challenges, may have limited suppliers and often has a technology component. Whether you are buying industrial equipment or MRI machines, this course will provide you with strategies to deal with the current challenges of capital equipment procurement and contracting. Recognizing that most entities have procurement processes in place, this course aims to enhance and facilitate your procurement process, not replace it. This course will address topics such as multiple stakeholder interests, total cost of ownership, unique equipment requirements, post warranty support, and dealing effectively with global equipment vendors. The course will address issues from the time the procurement need arises to contract completion, aiming to enhance and facilitate your current procurement process whether in the public or private sector.

If you want to address ways to improve capital equipment procurement and contracting in your organization, this interactive course will have something to offer you. This interactive course will assist you in dealing with your day-to-day capital equipment procurement and contracting issues.

This course is designed for anyone involved in creating, understanding or responsible for capital equipment procurement and contracting.

### PART 1

- What is capital equipment?
- Recognize the challenges of capital equipment procurement and contracting
- Focus on the often-overlooked areas of planning and design in equipment procurement
- Review the RFX Continuum
  - Zero in on a methodology that fits your equipment procurement needs
  - Discuss different procurement methodologies o Consider innovative procurement methodologies
- Strategic perspectives in your RFX - practices to consider and practices to avoid
- Examine how to effectively use templates in the procurement of equipment o Focus on drafting tips for your RFX
- Learn strategies for making the right equipment purchase
- Review questions to answer before your equipment purchase
- Discuss equipment lease versus buy considerations
- Explore equipment requirement strategies such as o Building the team
  - Costing approaches including Total Cost of Ownership and Life-Cycle Costing o Equipment requirements
  - Site-planning and turnkey considerations
- Review supplemental evaluation processes
- Address technical specification requirements under CFTA and CETA
- Examine strategies that can be embedded in your procurement process to finalize the contract
- Consider risk in equipment procurement and apply concrete strategies to mitigate the risk

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## PART 2

- Finalizing and developing the equipment contract
    - Explore equipment contract considerations
    - Review and discuss contractual provisions specific to equipment contracts that can strengthen your equipment contract
  - For equipment leases review and understand
    - Key components of an equipment lease
    - Options for financing an equipment lease
    - Selected risk areas in equipment leasing
  - INCOTERMS
    - Familiarize yourself with selected 2020 INCOTERMS that will impact equipment purchases
    - What do INCOTERMS do?
    - What do INCOTERMS not do?
  - Price escalation
    - Consider circumstances that drive price escalation
    - Review price escalation clause considerations
    - Understand the different perspectives of the supplier, contractor and owner
    - Explore drafting a price escalation clause
    - Examine common mistakes in drafting a price escalation clause
  - Supplier relationship updated
    - Explore practical takeaway strategies
  - Transitions during a crisis
    - Look at the current environment and its impact on supply chains as a path to change
  - Equipment transactions during a crisis
    - In this current environment gain some insight to transactions by addressing some key clauses, risks and strategies
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# Contract Fundamentals and Negotiations

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## 2 HALF-DAY SESSIONS

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Contracting and negotiating often pose complex challenges, risks and hurdles for organizations. As organizations look for ways of making those responsible for contracting and negotiating more effective, reliance on knowledgeable and trained staff will continue to play an important role. In this course, you will learn strategies to improve your understanding of contracts and to developing more robust contracts. You will explore the difference between and how to apply different negotiation styles, learn about key negotiation issues and how they practically impact your work, understand different negotiation strategies and how to avoid common negotiation pitfalls. Whether you are contracting or negotiating for a mega-deal or working on a low-key project, this 1-day course will provide you with updated strategies, best practices and skills to deal with contracting and negotiating.

Developed with a good balance between practice and theory, if you want to address ways to improve your contracting or negotiating skills for your organization and mitigate risk, whether in the public or private sector, this course will have something for you, including interactive exercises, take-away strategies and a tip sheet for negotiations for convenient reference.

This course has been designed for anyone involved in creating, understanding or responsible for developing or working with contracts and undertaking negotiations for their organization. If you are looking for a hybrid course on updated contract fundamentals and negotiations – this is the course.

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### PART 1 – CONTRACT FUNDAMENTALS

- Contract Development
- Contract Interpretation
- Service Contracting
- Strategies to enhance contract development such as
  - Understanding and utilizing due diligence
  - Focusing on the end game
  - Recognizing and having performance measurements work for you
  - Avoiding contract ghosts
  - Addressing confidentiality issues
  - Paying attention to form
  - Getting the most out of your terms and conditions

### PART 2 – NEGOTIATIONS

- What is Negotiation
  - Reasons for Negotiations
  - Types of Negotiations
  - Contractor's Perspective
  - Negotiation Process
  - Good Faith in Negotiations
  - Negotiation in Procurement
  - Negotiation strategies
    - Questions to ask
    - Avoiding common negotiation pitfalls
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# Advanced Canadian Construction Procurement

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## 2 HALF-DAY SESSIONS

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Advanced Construction Procurement offers a comprehensive understanding of the intricacies within the construction procurement landscape. From the challenges of procurement in the construction industry to sustainable practices and risk assessment, the course delves deep into various procurement strategies. It provides invaluable insights into tender/RFP development, contractor and supplier qualification, bid evaluation, and the critical correlation between procurement and finance. Additionally, it emphasizes effective contract management, performance evaluation, and the interplay between performance management and the validation of procurement strategies.

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### PART 1 – CONSTRUCTION PROCUREMENT

- Why Construction Procurement is so difficult
- Sustainable Construction Procurement
- Assessing Risks for a Construction Project
- Procurement Strategies for Construction
- CASE STUDY

### PART 2 – THE PROCESS OF CONSTRUCTION PROCUREMENT

- Developing Tenders/RFPs to get best value
- Qualifying Contractors and Suppliers
- Bid Evaluation and Scoring
- The Interaction of Procurement (cash flows, cash management, cost control) with Finance
- CASE STUDY

### PART 3 – CONSTRUCTION PERFORMANCE MANAGEMENT

- Contracting Construction projects
- Management of Contract Performance
- How to handle Performance issues
- Is Performance Management a validation of the Procurement Plan?
- CASE STUDY

### PART 4 – CONSTRUCTION PROCUREMENT PLANNING

- The Construction Plan, Procurement Plan, Project Plan
  - The Construction Procurement Contracting Plan
  - Multi-Contract, Multi-Procurement Plans
  - How do all the Plans intersect and work together?
  - CASE STUDY
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# Emotional Intelligence in the Age of AI

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## 2 HALF-DAY SESSIONS

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Research referenced in Harvard Business School Insights indicates that 90 percent of top performers exhibit high levels of emotional intelligence. This finding upends the traditional belief in IQ as the primary driver of success. Decades of research now underscore emotional intelligence as the key differentiator among top leaders. This will become even more important in the age of AI. Enhancing your EQ not only boosts personal performance but also fosters successful team dynamics. This course will focus on EQ skills which will enhance your ability to communicate effectively, make good decisions, handle conflict, be a team player, respond to change well, handle stress better, and improve your life.

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### KEY TAKE-AWAYS

- Understanding Emotional Intelligence
  - Developing Self-Awareness and Self-Management
  - Enhancing Social Awareness and Relationship Management
  - Improving Decision Making and Conflict Resolution Skills
  - Leading with Emotional Intelligence
  - Reflecting on Personal Strengths and Areas for Growth
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# Update on Trade Agreements, plus New Labour Laws

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## 1 HALF-DAY SESSION

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In order to tackle the new normal of our post-pandemic world, its new challenges, risks and opportunities, and with supply chains getting more complex, it is essential to stay abreast of changes and best practices that will help us develop stronger supplier and customer relationships, while increasing both our resilience and our competitiveness. Taking this online course will provide you with the tools to be more empowered when dealing with suppliers, customers, service providers and government agencies involved in your international supply chain.

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### PART 1 – CONSTRUCTION PROCUREMENT

- Overview of Canada's current FTA's, how they work and where to find the information
- The technical aspects of FTA's: rules of origin, certificates of origin, cumulation and transshipments
- The responsibilities of seller and buyer
- Update on anti-dumping duties and similar
- Outlook on future FTA's
- CUSMA (USMCA), how does it work and what's different from NAFTA
- Our underutilized FTA's: CETA (with the European Union) and the Trans-Pacific
- Partnership (with 10 Pacific countries, including Japan)

### PART 2 – FOCUS ON THE NEW REGULATIONS ON FORCED LABOUR AND COMPLIANCE

- The context: ethics and geopolitics
- Where it started: the U.S. UFLPA (Uyghur Forced Labour Prevention Act) and its consequences for Canadian importers and exporters
- Canada's Bill S-211, the Fighting Against Forced Labour and Child Labour in Supply Chain Act, coming into force on January 1st, 2024
- The Mexican equivalent, in effect since May 18th, 2023
- The upcoming European Union regulations in this respect

Part One is designed as a review and update on our Free Trade Agreements, to ensure Canadian companies reap all their benefits, while staying compliant. Part Two focusses on preparing our supply chain professionals for the recent regulatory changes on forced labour, how to prepare for them and steps to be taken with suppliers to ensure full compliance.

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# Advancing the Business Case for Net Zero Procurement

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## 3 HALF-DAY SESSIONS

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The relevancy and application of net-zero procurement will impact the career of all supply chain professionals. In fact, Supply Chain has become the new lynchpin to ensure net-zero policies are effectively operationalized, measured, reported, and leveraged to support organizational business and social purpose objectives. However, to truly establish Supply Chain's capacity to lead net-zero, supply chain professionals must elevate their ability to represent and discuss the business case for net-zero procurement. Importantly, developing new customized communications strategies that will resonate and relate to; C-Suite leaders, organizational staff, supply chain partners, customers, and industry & community stakeholders.

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## KEY TAKE-AWAYS

- Customized communications, real-world Q&A and case studies that elevate supply chain's capacity to advance & leverage the business case for Net-Zero Procurement.
  - Transformative RFP and RFQ language and strategies that ensure competitive bids incentivize products and services that align with organizational ESG and Net-Zero Policy objectives.
  - Innovative strategies that ensure successful bids and supply partners measurably advance products and services that align with organizational policies during contract term.
  - Net-Net Pricing Strategies that ensure emission reduction policies are accurately reflected & represented when reviewing supply chain partners, products, and services.
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# DIPLOMA PROGRAMS

Start strong with a dynamic supply chain career.

Offered by NISCL, The Diploma in Procurement and Supply Chain Management is geared to skilled professionals at the intermediate level. This is a great program for those with 1 year of work experience.

# Legal Issues and Ethics in Supply Chain

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## 28 HOURS ACROSS 3 MONTHS

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Legal Issues and Ethics in Supply Chain is one of the required courses in the Diploma in Procurement and SCM program. It will be conducted in a webinar format using the Zoom platform. The webinars are not recorded. In this interactive course there is a grade for participation. Paid registrants will be sent a webinar registration link the night before the first session.

**Textbook:** Contemporary Canadian Business Law Principles & Cases © 2015 by John A. Willes & John H. Willes. 12th edition, 9781259030765 • 1259030768

Please go to this website to purchase the textbook

<https://www.mheducation.ca/contemporary-canadian-business-law-9781259654893-can-group>

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## KEY TAKE-AWAYS

The goal of the course is to expose participants to business law in Canada. Law is a means of social control as well as a method by which disputes are resolved. This course will discuss the law as it relates to administering business contracts. Laws are made by governments in the form of statutes, and by the courts as the Common Law.

- Describe the key instruments and tools which need to be addressed in every supply management transaction, regardless of the product, service or location of the source.
  - Determine the scope of business transactions in order to mitigate liability and risk to the organization and employees.
  - Gain an understanding of business law in Canada and identify different ways of addressing trade disputes.
  - Understand the legal and business requirements for developing contracts, performance metrics and successfully execute them.
  - Performing comprehensive legal research and applying it in a case study.
  - Presenting analysis orally, and arguing it orally.
  - Define law, explore its origins and examine methods of enforcement.
  - Recognize the most usual SCM ethical issues and professional liability issues and resolving them in a professional manner.
  - Apply the lessons learned about the extent of performance required to discharge a contract.
  - Properly conduct him or herself in accordance with the SCM standards.
  - Examine the way the law of agency impacts on forms of business.
  - Assess the nature of a corporation and the process of incorporation.
  - Distinguish between conditions and warranties in a contract.
  - Understand the role of various payments methods and the law relating to them.
  - Apply the forms of insurance and how they are using in risk management.
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# Purchasing Process and Practice

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## 28 HOURS OVER 3 MONTHS

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Purchasing Process and Practice is one of the required courses in the Diploma in Procurement and SCM program. It will be conducted in a webinar format using the Zoom platform. The webinars are not recorded. In this interactive course there is a grade for participation. Paid registrants will be sent a webinar registration link approximately one week before the course starts.

The course introduces participants to the complete purchasing process. Purchasing concepts and practices are introduced and elaborated during the online seminar sessions. The evolution of the purchasing profession is examined, from its origins of being an administrative function, to today's strategic global E-Procurement role. Purchasing's collaboration with other departments are examined and its' contribution to supporting the organization's goals and policies are examined.

**Textbook:** Purchasing and Supply Chain Management, 6th edition, © 2016, Monczka, Handfield, Giunipero, Patterson, ISBN: 978-1-285-86968-1

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# Evaluating Supply Management Costing Data

## 28 HOURS OVER 3 MONTHS

Students analyze the responsibilities of supply chain from a macro and micro economic perspective. Upon completion of the course, students will understand the costs and key performance indicators which strategically influence operational decisions, while adopting processes for effective and high-quality supply management decisions.

**Textbook:** Operations & Supply Chain Management The Core, 4th edition, © 2017, F. Robert Jacobs and Richard Chase.

### KEY TAKE-AWAYS

Attend this two day workshop to:

#### Introduction to Operations & Supply Chain Management Strategies

1. Evolution of Supply Chain Management
2. Financial Contributions
3. Functions of organizational structures, ownership & management
4. Triple Bottom Line
5. Comparing 'goods' & 'services'

#### Sales & Operations Planning

1. Sales & Operations Planning (S&OP)
2. Planning Horizons, Yield Management & Production Planning Strategies

#### Process Analysis

1. Product-Process Matrix
2. Process Mapping
3. Process Performance Metrics
4. Make-to-Order versus Make-to-Stock

#### Strategic Service Process Analysis

1. Process Design
2. Waiting & Queuing Time Analysis
3. Service-System Design Matrix
4. Operational Classifications

#### Logistics

1. Logistics System Design Matrix
2. Factor Rating System
3. 3PL

#### Inventory Management

1. Scope & Purpose
2. Inventory Performance Metrics
3. Pareto 80 / 20 Analysis
4. ABC Classification
5. Total Inventory Costs

#### Forecasting

1. Forecasting Ranges
2. Forecasting principles & practices
3. Qualitative and Quantitative Forecasting Techniques
4. Evaluating Forecasting Performance (ie. MAD, MAPE, SD)

#### MRP

1. Evolution of MRP to ERP
2. Contributions to the supply chain and operating performance metrics
3. Review concepts & applications (ie. MPS, BOMs, Lead Times, Inventory Files)
4. Ordering Practices (EOQ, Part Period, Lot for Lot)

#### Lean Supply Chains

1. Reduction of waste strategy
2. Kaizen
3. Toyota Production System
4. KANBAN
5. JIT
6. Lean Supply Chain Design Principles
7. Value Chain Mapping

#### Global Sourcing & Procurement

1. Role of sourcing and procurement
2. Establishing cost effective supply chains
3. Develop & evaluate Vendor Performance metrics
4. Manage Vendor Performance
5. Bullwhip Effect
6. Green Sourcing
7. Total Cost of Ownership

#### Quality

1. Scope & purpose of Total Quality Management (TQM)
2. ISO Quality Programs
3. TQM costs
4. Six Sigma
5. DMAI

# Contract Management and Competitive Bidding

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## 2 DAY WORKSHOP

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The goal of this workshop is to provide supply chain professionals with information and skills required to manage the bidding and contracting processes.

This workshop focuses on practical matters in bidding and contracting, including drafting of competitive bidding documentation, application of competitive bidding law, the basics of contract formation and good practices in contract management.

Candidates will have an opportunity to apply knowledge of good practices in competitive bidding to a “challenge scenario,” with a view to realizing preventative and remedial solutions.

The final project will offer candidates the opportunity to create a quality RFP, test their RFP drafting skills and then benefit from expert feedback from the instructor.

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Understand competitive bidding activities and best practices.
  - Read/write competitive bidding documents (RFQ and RFP).
  - Understand the foundations and implications of Canadian competitive bidding law.
  - Understand the implications of Canadian inter-provincial and international trade agreements for competitive bidding activities in the public sector.
  - Understand the implications of the United Nations Convention on Contracts for the International Sale of Goods (CISG) on contracting activities in Canada.
  - Understand how contracts are formed, and how to form contracts in a manner that avoids introducing uncertainty into their formation and later operation.
  - Understand the component parts of processes for contract administration and management.
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# Financial Scope of Supply Chain Management

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## 2 FULL-DAY SESSIONS

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Supply Chain Management is the process of managing the flow of goods, services, knowledge and resulting finances. Understanding financial data ensures that responsible and ethical supply management practices and policies are followed with the ultimate goal of improving an organization's profitability. Effective strategic financial decisions include evaluating, planning and executing supply chain management initiatives that ensure the needs of customers, employees, management and stakeholders are fulfilled.

In order to be successful in the 21st century global marketplace it is necessary for supply chain professionals to be familiar with financial concepts, practices and principles, and to know how to incorporate them into the organization's everyday operations.

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Demonstrate the use of basic financial tools in evaluating financial statements.
  - Recognize the importance of financial transparency and other ethical financial supply chain management practices.
  - Explain how measuring supply chain profitability relates to overall profitability and the strategic direction of the organization.
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# Inventory Management

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## 2 DAYS

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Inventories represent one of the most important assets any organization invests in. If inventory is not managed properly, it will represent a cost liability to the organization. The greatest potential for productivity improvement is inventory reduction, however, making sure to maintain the inventory levels improves customer service.

The function of inventory management is seldom appreciated. It seems that only when the inventories fail to generate revenues it receives attention from the responsible personnel of the organizations.

This seminar will introduce the participants to the mechanics of inventory management and follow through by introducing and demonstrating the application of these necessary resources for ensuring continued growth to the organization.

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### KEY TAKE-AWAYS

Attend this two day workshop to:

- Demonstrate the impacts of supply chain strategies to inventory investments.
  - Demonstrate the impacts of inventory investments on the income statement, balance sheet, profitability and return on investment.
  - Discuss how inventory management strategies influence the measurement of supply chain costs, service, profit and revenue.
  - Understand the scope and importance of supply chain performance measurement.
  - Explain the characteristics of good performance measures.
  - Appreciate the role and importance of inventory in the economy.
  - List the major reasons for carrying inventories.
  - Discuss the major types of inventories, their costs and relationships to inventory decisions.
  - Understand the fundamental differences among approaches to managing inventories.
  - Describe the rationale and logic behind the economic order quantity (EOQ) approach to inventory decision making and how this logic is used to resolve inventory management challenges.
  - Understand alternative approaches to managing inventories: JIT, MRP, DRP, VMI, Consignment & Supplier negotiations.
  - The scope and application of forecasting inventory requirements versus the benefits resulting from the reduction of cycle times.
  - Explain how inventory items can be classified.
  - Know how inventories will vary as the number of stocking point changes.
  - Recognize and calculate how inventories contribute to the Total Cost of Ownership.
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# Transportation Services

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## 2 FULL-DAY SESSIONS

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Effective management of transportation services is essential for maintaining inbound supply schedules and customer service requirements. This seminar is designed to provide participants with an understanding of the various services available to purchasers, elements of the sourcing and acquisition process, contractual requirements and service metrics necessary to transform transportation into a strategic asset for the organization.

*Topics covered include:*

- Modal Analysis and Product Constraints
  - Selection Criteria
  - Acquisition Strategies
  - Performance Metrics and Best Practices
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# The Art of Negotiation

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## 2 DAY WORKSHOP

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The goal of this workshop is to provide the CSCL candidates with the theoretical concepts and practical methods and techniques to help them develop their negotiation skills. This workshop focuses on assessing your own and the other party's negotiating skills, differentiating between distributive and integrative negotiation; establishing trust and building relationships; and addressing the concepts of power, persuasion, and ethics in negotiations.

Whether the candidates deal externally with vendors or internally with various corporate stakeholders, negotiating effectively requires the ability to understand the parties' positions, motivations, and purpose, to move away from conflict and toward collaboration.

In this dynamic and interactive workshop, the candidates will acquire proven skills for maximizing the value of your negotiation through custom simulations ranging from pricing, contract terms and conditions, and licensing to international, domestic, public, and private disputes.

The candidates will acquire a set of strategies that can be used to deal with difficult negotiation behaviours and hard-bargaining tactics.

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Describe the importance of trust and persuasion in negotiations.
  - Explain the role of emotional intelligence and conflict resolution in negotiation.
  - Identify and remove obstacles to integrative negotiation in the buyer-supplier context.
  - Develop primary negotiation skills needed to establish negotiation targets, and reservation points, and develop a BATNA.
  - Summarize the six phases of the negotiating process (preparation, opening, testing, moving, conclusion, evaluation) and the role they play in the negotiation process.
  - Recognize and apply sources of power in negotiation.
  - Define the role of the cultural context in negotiations.
  - Identify e-negotiations' advantages and shortcomings.
  - Distinguish between ethical and unethical negotiation practices.
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# Risk Management

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## 2 DAY WORKSHOP

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The goal of this workshop is to provide the CSCL candidates with the theoretical concepts and practical methods and techniques to help develop their risk management skills.

Risk management is a corporate strategic initiative. To ensure a resilient supply chain, identifying potential risks and planning risk mitigation is paramount. Risk Management requires the integration of people, technology, information, and resources both internal and external to the organization.

The focus of this workshop is on risk identification, assessment, mitigation, and management. Various tools will be introduced, and candidates will get an opportunity to apply these tools in their own organizations.

For the final assignment, candidates will be asked to prepare a risk management program for their organization. The final assignment is due one week after the end of the workshop. Candidates must attend the workshop and participate in all workshop activities prior to submitting the final project..

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Describe risk and risk management.
  - Define supply chain risk and apply the principles of supply chain risk management.
  - Analyze an organization's preparedness for risk management.
  - Apply the methods for identifying, quantifying, and mitigating risk.
  - Evaluate the strategies of dealing with risk, including acceptance, avoidance, mitigation, and transference and identify when to apply each strategy.
  - Develop a supply chain risk management strategy for an organization.
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# Ethics: Social & Environmental Responsibility

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## 2 DAY WORKSHOP

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The goal of this workshop is to provide the CSCL candidates with the theoretical concepts and practical methods and techniques to help them develop their ethical skills to confront the challenges in business and supply chain social responsibility.

Through videos, discussions, mini-cases and exercises, candidates will learn about ethics from a philosophical and practical perspective. They will learn how to address ethical dilemmas in personal and professional settings. They will study methods and processes to deal with various social responsibility factors and environmental concerns.

The candidates must prepare a critique of their organization's code of ethics as the workshop's final assignment. The final assignment is due one week after the end of the workshop. Candidates must attend the workshop and participate in all workshop activities prior to submitting the final project.

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Identify and contrast the different perspectives on ethics.
  - Define "business ethics" and determine how to solve business ethics dilemmas.
  - Analyze and improve an organizational code of ethics.
  - Identify the benefits of social corporate ethical conduct.
  - Explain the importance of environmental ethics in business.
  - Evaluate how ethics affects the economic, social, and environmental development in their communities.
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# The Importance of Communication

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## 2 DAY WORKSHOP

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Supply Chain Management professionals manage change while leading groups of people. However, to successfully perform these duties, professionals must rely on their abilities to communicate effectively and with purpose. The objectives of this workshop are (1) to help candidates develop both oral and written communication skills, and (2) to learn how their relational skills, also known as soft skills, carry equal, if not more relevance in today's professional landscape.

This workshop focuses on how effective communication and relational skills can be used to support strategic issues identified throughout the supply chain. In particular, and essential to supply chain professionals are competencies such as listening skills, spoken and written communication, persuasiveness and lastly, the ability to understand and explain complex issues to their teams, partners, and customers throughout the supply chain.

The workshop will provide candidates with the opportunity to improve their own communication and relational skills in a highly interactive learning environment..

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Define communication skills and relational skills, and how the two relate.
  - Understand the importance of internal and external communication.
  - Learn how to communicate strategically when dealing with vendors.
  - Understand how learning styles affect the way we communicate.
  - Refine key communications methods, tools, objectives, structures, presentation skills.
  - Understand how media influences the way we communicate.
  - Receive and process constructive feedback using key communication skills.
  - Understand key inter-relational dynamics and techniques used in information sharing, persuasion, negotiation, meetings, presentations, and difficult discussions.
  - Understand contemporary factors impacting virtual offices and teams.
  - Develop new relationship-building skills to build professional career.
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# Effective Leadership

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## 2 DAY WORKSHOP

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While leadership involves the ability to inspire, motivate, and guide others towards a common goal, a professional leader is one who exhibits the ability to lead by example, demonstrate ethical behavior, and create a positive work environment, all while encouraging growth and development.

The goal of this workshop is to provide CSCL candidates with both theoretical concepts and practical techniques that address leadership and professionalism in the workplace. The discussions, case studies, activities, and videos, explored throughout the two-day workshop will demonstrate the interchangeable relationship between the two concepts.

The Leadership and Professionalism workshop draws from the works of highly credible “thought leaders” in the areas of leadership, management, and human relations.

The candidates will be required to prepare a critique of their personal leadership style as the workshop’s final assignment. The final assignment is due one week after the end of the workshop. Candidates must attend the workshop and participate in all workshop activities prior to submitting the final assignment..

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Differentiate between Management and Leadership.
  - Identify Leadership Styles and Theories.
  - Complete DISC Assessment.
  - Explore best practices in vision and mission statement development.
  - Develop ways to build, lead and inspire cohesive teams.
  - Determine the right approach in handling workplace conflicts.
  - Identify critical steps within the change management process.
  - Recognize interrelation of Leadership and Professionalism.
  - Showcase Supply Chain Leader Trailblazers.
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# HEALTHCARE SUPPLY CHAIN AND PROCUREMENT CERTIFICATE PROGRAM

Excellence in continued supply chain education.

The supply chain landscape has never before been so dynamic. Continuous education has therefore become more important than ever. It is the best way to build new skill sets and gain expertise on subject matter that is pertinent to the industry. At NISCL, we manifest our three operational tenets of currency of content, speed to market and accessibility when we curate the topics for our professional development sessions.

## MODULE 7 - Shared with CSCL Curriculum

# Public Sector Supply Chain Management

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### 7 WEEK ONLINE COURSE

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In the public sector, supply chain management refers to coordination of all parties involved in delivering a combination of inputs, outputs or outcomes that will meet a specified public sector requirement. It is an integral part of financial management, at the same time addressing government's procurement policy objectives.

The goal of this module is to understand the differences between public and private sectors, how each stakeholder can be managed in the public sector, understand the challenges at different levels of public sector and how they can be managed.

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### KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Identify the various stakeholders in the public sector.
  - Understand the different characteristics of supply chain management in public sector vs private sector.
  - Explain the rationale for the use of competitive bidding in the public sector.
  - Identify the conditions for when it is appropriate to use each of the various options for sourcing goods and services.
  - Describe the various components and importance of procurement strategy.
  - Develop an understanding of the components and importance of incorporating social responsibility requirements in procuring goods and services.
  - Describe the use of e-procurement in the public sector.
  - Identify and describe the implications of ethics in the public sector.
  - Describe the unique challenges of procurement in different forms of the public sector.
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## MODULE 8

# Major Projects, Capital Goods, and Services

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### 7 WEEK ONLINE COURSE

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Supply chain's role on the growth of the service and capital goods industry has been rapidly evolving with profound attention worldwide.

The goal of this module is to focus on how the services and goods industries are intertwined into every supply chain model, with the services component outgrowing the goods when it comes to revenue generation and to build a stronger grasp of escalating economic momentum in supply chain project management.

Topics covered include the ability to identify the underlying risks and develop effective strategies for both service sector and large projects supply chain management, the process to manage supply chain management service delivery effectively and build an understanding for any associated hinderances. Additionally, the topic of capital procurement is covered along with its relation to major project management and project management.

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### KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Define services, capital goods, and major projects.
  - Define growth in the services sector and the need for performance optimization.
  - Describe the differences and similarities in the capital equipment acquisition process relative to normal operating goods.
  - Analyze capital goods investment by understanding present value concept and total cost of ownership.
  - Understand the process of project management for large projects, and the impact on the supply chain.
  - Describe issues related to asset disposal and asset recovery.
  - Discover emerging trends in supply chain management of major projects.
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# Data Analytics

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## 4 HALF-DAY WORKSHOPS

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The Data Analytics for Healthcare is a 16-hour training delivered by Dr. Prashanth H Southekal (profile below), Founder and Managing Principal of DBP-Institute. This training will equip participants with key data and analytics concepts and skills across the data analytics domains. Data analytics in health care is vital. It helps in the detection of anomalies in scans and predict outbreaks in illness. It helps health care organizations evaluate and develop practitioners. Data analytics drives efficiencies including lower costs for healthcare organizations. Most importantly, it helps companies and hospitals make better decisions for patients.

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## KEY TAKE-AWAYS

*Upon completion of this workshop candidates should be able to:*

- Understand the fundamentals of Data Analytics, Business Data, and IT Systems in the context of healthcare.
  - Apply Data Analytics techniques to extract insights from healthcare data.
  - Communicate these insights effectively to business stakeholders, identifying opportunities and use-cases for data and analytics.
  - Make informed and prompt decisions using appropriate decision science techniques.
  - Collaborate with diverse stakeholders based on proven best practices to enhance healthcare performance
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# Supplier Relationship Management & Risk Management

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## 4 HALF-DAY WORKSHOPS

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In today's world, effective relationship management skills are crucial for a successful and harmonious work environment, particularly in the challenging field of Healthcare. Balancing job performance with strong relationships is vital to conducting good business.

This dynamic and practical 4 half-a-day workshop will enhance your skill set, and preparedness. The course objective is designed to comprehensively address Relationship Management within the context of the Healthcare sector. It will provide frameworks and advice for identifying, assessing, avoiding, transferring, and mitigating supply chain challenges/risks.

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### KEY TAKE-AWAYS

**Account Relationship Management:**

Creation of an organizational design facilitating strategic relationship management in the healthcare industry, involving dealings with suppliers and customers.

**Commodity Management:**

Involves setting up category management frameworks, comprehending stages of strategic commodity management, and learning how to operationalize these processes.

**Contract Management:**

Involves understanding the guiding principles of a strategic management process, policy, and structure.

**Risk Management:**

In the context of relationship management, it entails identifying potential risks and addressing them effectively, with a framework for assessing and applying risk to relationship, commodity, and contract management.

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## OUR INSTRUCTORS



### DEBBY SHAPERO PROPP

Debby Shapero Propp is a commercial lawyer with a focus on procurement, technology and health law and has provided legal services in the private, public and broader public sectors for over 25 years. Debby both provides advice on challenging procurement initiatives and major group procurements and develops and implements procurement processes and related agreements. Debby acts for her clients in major technology acquisitions and negotiations.

Debby is a seasoned and dedicated public presenter and instructor and regularly teaches across Canada. Drawing on her experience working both with a wide range of clients and as in-house counsel, over the last number of years Debby has developed practical and well-received professional development courses that are presented across Canada for private, public and broader public organizations. Debby also regularly writes for Canadian publications.

Debby has been recognized as one of the 100 Influential Women in Canadian Supply Chain<sup>TM</sup> and is the only recipient in the Legal Services Category.

For more information see [www.shaperopropp.ca](http://www.shaperopropp.ca) and <https://www.linkedin.com/in/debby-shapero-propp-8a744921/>



### SANDY CHALKOUN

Ms. Sandy Chalkoun, the founder of Altura Legal Strategies Inc., is dedicated to providing expert legal training to corporate professionals. Her seminars are designed to provide attendees with legal strategies for integrating the law with day to day business activities. Ms. Chalkoun completed a Bachelor of Arts from Concordia University, a Bachelor of Civil Law and a Bachelor in Common Law from McGill University, and is a member in good standing of the Quebec Bar. She served as legal counsel for several multinational corporations before starting her own corporate training company. She has been teaching purchasing professionals for over 20 years.



### DR. PRASHANTH H SOUTHEKAL

Dr. Prashanth H Southekal is the Managing Principal of DBP-Institute, a Data Analytics Consulting and Education company. He brings over 20 years of Information Management experience from over 75 companies such as SAP, Shell, Apple, P&G, SAS and GE. In addition, he has trained over 3,000 professionals world over in Analytics, Data Products, and Enterprise Performance Management (EPM). He sits on the Advisory board of Evalueserve (Switzerland), uArrow (Singapore), Miles Education (India) and Grihasoft (India). Dr. Southekal is the author of 2 books - Data for Business Performance and Analytics Best Practices and writes regularly in Forbes.com. He is an adjunct faculty of Data Analytics at the University of Calgary (Canada) and IE Business School (Spain). Dr. Southekal holds a PhD from ESC Lille (FR) and an MBA from Kellogg School of Management (US).

## OUR INSTRUCTORS



### DAN GEORGESCU

Dan Georgescu is a business consultant specializing in operations and supply chain management. Dan helps companies achieve efficiency goals and extract additional value from their supply chains.

Dan works as a professor and academic developer at Conestoga College. His expertise is in the automotive supply chain, quality, and sustainability. He focuses on supplier development, suppliers' strategic alignment, supplier performance measurement, strategic sourcing, supply base segmentation and optimization, quality operating system, production efficiency improvements, total quality, lean six sigma, and statistical process control.

He is also a faculty member in the BBA and MBA programs at the Lazaridis School of Business and Economics at Wilfrid Laurier University and in the MBA and MSCM programs at the Schulich School of Business at York University. Dan teaches Operations Management (OM), Procurement, Supplier Relations Management, and SCM.

As an Operations and Supply Chain Management subject matter expert Dan creates, develops, teaches, and delivers professional development and academic courses like Risk Management, Negotiations, Ethics, Strategic Supplier Development, Supply Chain Strategy, Strategic Sourcing, Leadership, Communications, and International Business.



### PAUL SAUNDERS

Paul Saunders, MBA, BA is a leader in public and private procurement with deep roots and experience in Canadian Construction Procurement. As a consultant, Mr. Saunders works to find opportunities that promote the use of technology to make procurement more efficient, transparent and effective for organizations.

For 8 years he was President of MERX Networks where he built and managed online service offerings for both Public and Private Construction in both Canada and the United States. Prior to MERX, he acted as the President and CEO of COAST Software and Vice President of Cognos. Most recently, Paul was the President of Pixelink, a Canadian manufacturer responsible for deploying and managing an ERP to manage inventory and procurement.

During his career, he has worked with organizations such as; City of Calgary, Manitoba Hydro, Brookfield Group of Companies, Infrastructure Ontario and the Federal Government to deploy new technology in order to modernize Construction Procurement.



### LOUANN BIRKETT

LouAnn Birkett, CSCL, FSCMP, has over 35 years experience in the public sector and retired as Purchasing Manager for the Regional Municipality of Durham in 2016. There she was responsible for the leadership of the Procurement staff to strategically deliver the supply of goods and services required by all Regional Departments. LouAnn was a member of the Supply Chain Canada (SCC) Board from 2010-2021. She has held various positions including, Vice Chair, Past Chair and Chair of the Governance Committee. She is Past President of SCC Ontario, as well as Past President of the Durham District of the SCC. Most recently she was appointed to the NISCL Board of Directors for the term of 2024-2026.

Throughout her various volunteer roles LouAnn has been instrumental in working with various team in implementing strategies to achieve growth, organizational recognition, and change. In 2017 LouAnn was awarded the prestigious National Fellowship designation. In addition to teaching for various colleges and other Professional Organizations, LouAnn has extensive experience in both developing and instructing the CSCL Program and is currently an instructor for Modules 2 and 7. Over the past 6 years she has assisted public organizations source their procurement needs through competitive bidding, developed policies and procedures that comply with all trade agreement requirements and provided customized training of both staff and Councils. Currently, LouAnn is a Senior Supply Chain Advisor – Contracts, for Kinetic GPO, where she continues to utilize her skills in public procurement.

*Among all our instructors, the above are the most sought-after ones. We do have many other instructors who are not on the list but are experts in their respective fields.*