

# FUNDAMENTALS IN WRITING SCOPES & KPIs

**2-Day Training Course: The Guide to Designing Best Practice Scopes & Key Performance Indicators**

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

3-4 June 2019 • Melbourne | 18-19 June 2019 • Sydney | 26-27 August 2019 • Brisbane



**informa**  
corporate learning

**Our Expert  
Course  
Instructor**



#### **Joe Caruso**

Joe is a former CIO, as well as a former operations and development leader in various ITC providers. Joe's experience of being on both the buy side representing customers, and the sell side representing suppliers, enables him to have a "two sides of the coin" view of projects and contracts and allows him to reach outcomes that are mutually beneficial to both parties, and ensuring success and sustainable relationships.

## Key Learning Objectives

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



This course is a core unit in the Contract Management Professional Certification.



Informa Corporate Learning is an IACCM Learning Partner.



Use this course to help fulfil your Continuing Professional Development (CPD) educational requirements to retain your professional status.

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## ABOUT THE COURSE

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

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

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

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

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

## EXPERT COURSE INSTRUCTOR



**Joe Caruso**

Joe is a former CIO, as well as a former operations and development leader in various ITC providers. Joe's experience of being on both the buy side representing customers, and the sell side representing suppliers,

enables him to have a "two sides of the coin" view of projects and contracts and allows him to reach outcomes that are mutually beneficial to both parties, and ensuring success and sustainable relationships.

Joe has provided expert advice and trained over 1300 professionals on ICT systems strategy, outsourcing, strategic contract management and governance with subjects that include; service level agreements, ICT and Cloud, tendering and contract management across Australia, New Zealand, Middle East and in the Asia Pacific region. Joe holds a Master of eBusiness and has previous taught at Monash University.

## WHO WILL BENEFIT

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

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

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## 2-Day Course Outline

### Understanding the importance of the scope

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

#### 🕒 Exercise:

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

### Drafting the scope

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

### Scope exercises

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

### Performance specifications (KPIs)

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

### KPI exercises

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

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

#### 🕒 Exercise:

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

### Wrap up and evaluation

## WHAT OUR CLIENTS SAY

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

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

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

Legal, **Monash University**



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

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

If you have **8+** interested people, an onsite course can be an ideal solution. Speak with **Anton Long** or **Holly Baldwin** on **+61 (02) 9080 4454** to discuss your customised learning solution, or email [training@informa.com.au](mailto:training@informa.com.au)

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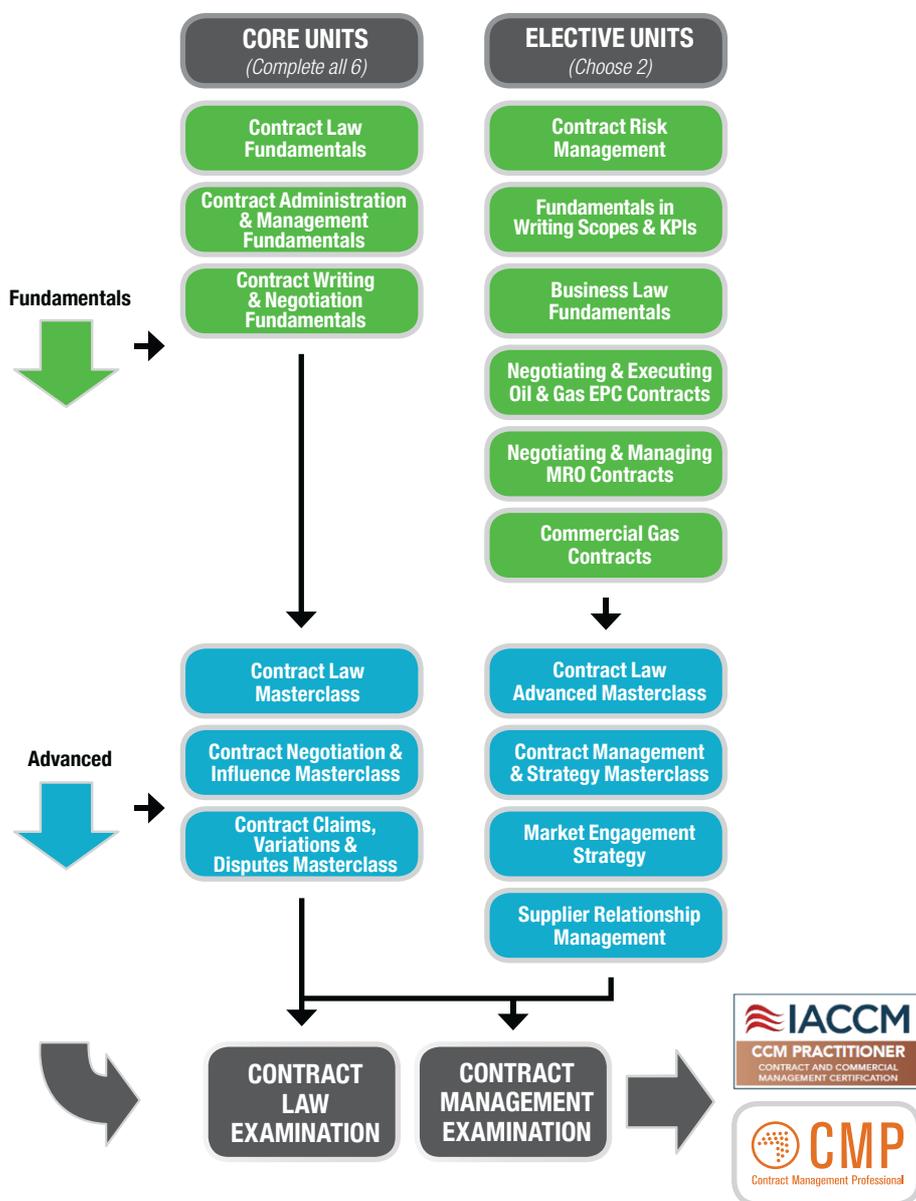
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## THE CMP CERTIFICATION FRAMEWORK

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

Contact us to see how we can help you:

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



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

## ABOUT IIBT



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

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

## THE IIBT / INFORMA CORPORATE LEARNING ALLIANCE

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

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

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

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## Easy Ways to Register

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

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

## Stay Connected



## Fundamentals in Writing Scopes & KPIs

	Location	Course Dates	Super Early Bird price valid until		Early Bird price valid until		Standard price valid after		4+ Dels Discount	
			ME - 26 Apr 19	SY - 10 May 19	ME - 17 May 19	SY - 31 May 19	ME - 17 May 19	SY - 31 May 19	BR - 10 Aug 19	BR - 10 Aug 19
P19GL07ME	Melbourne	3-4 Jun 19	\$2,595 + \$259.50 GST	<b>\$2,854.50</b>	\$2,795 + \$279.50 GST	<b>\$3,074.50</b>	\$2,895 + \$289.50 GST	<b>\$3,184.50</b>	\$2,236 + \$223.60 GST	<b>\$2,459.60</b>
P19GL07SY	Sydney	18-19 Jun 19	\$2,595 + \$259.50 GST	<b>\$2,854.50</b>	\$2,795 + \$279.50 GST	<b>\$3,074.50</b>	\$2,895 + \$289.50 GST	<b>\$3,184.50</b>	\$2,236 + \$223.60 GST	<b>\$2,459.60</b>
P19GL07BR	Brisbane	26-27 Aug 19	\$2,595 + \$259.50 GST	<b>\$2,854.50</b>	\$2,795 + \$279.50 GST	<b>\$3,074.50</b>	\$2,895 + \$289.50 GST	<b>\$3,184.50</b>	\$2,236 + \$223.60 GST	<b>\$2,459.60</b>

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

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

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

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

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

### Our Long Standing Clients Include:

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

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