

2010

# IT Procurement Courses

turnstone

Your IT Spend: Strategy,  
Cost & Tendering Support



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## Introduction

Our courses are focused solely on IT Procurement, to help your team drive the best from your suppliers and your IT budget.

Our trainers are all IT Procurement experts, with qualifications from the Chartered Institute of Purchasing and Supply, backed up by years of experience dealing with IT vendors day in, day out.

Courses may be taken in any order, although there is a benefit to completing courses 1 to 3 first, as these form a useful foundation for courses 4 onwards.

All courses are run within a week, allowing you to attend as few or as many as you wish.

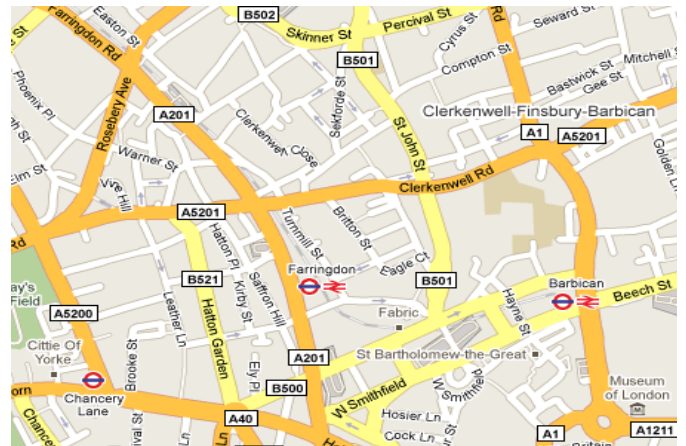
1. IT Commercial Awareness and Savings Techniques (1 day)
2. Negotiation Skills and Driving the Best Deal (1 day)
3. Accelerated Tendering – benefit without the pain (1 day)
4. Successful Outsourcing and the Procurement of IT Services (1 day)
5. Advanced Software Procurement (1 day)
6. Vendor Performance Management (1 day)

Courses are run at our facility in the City of London. Please see page 10 for pricing and page 11 for the course schedule.

Discounts apply for booking multiple courses.

For general enquiries please contact Alex at [alex.sandercock@turnstoneservices.com](mailto:alex.sandercock@turnstoneservices.com).

To book any of our courses, please fill out the booking form at the back of this document, or to make credit card bookings phone 0207 936 4374.



# 1. IT Commercial Awareness and Savings Techniques

## Summary

This course will enhance your commercial skills in buying IT goods and services, increase your confidence with vendors and ability to reduce cost. It will help you to manage the commercial risk inherent in any IT contract, through practical real world examples.

## Key Benefits

1. *Risk Mitigation*: Understand key contractual clauses and their commercial implications. Reduce your exposure and risk of being caught out when disputes arise
2. *Service Improvement and Cost Control*: Ensure that service contracts deliver what they are meant to, learn the different cost mechanisms and how to use them to your favour
3. *Reusable Materials*: take away from the course a reference pack which you can use when preparing for, during and after your own vendor negotiations

## Audience

- IT managers and staff
- Procurement Managers and Sourcing Specialists
- Professionals whose role includes IT Vendor Management

## Syllabus

- IT Disasters: how not to buy IT
- Business and Contractual risk management
- The Procurement Process
- Forming a Contract
  - Dangers such as the 'accidental contract'
  - Key commercial terms and best practice clauses in IT contracts
  - Statements of Work and essential components
- Specific IT spend categories
  - Software – the procurement checklist
  - Hardware agreements – looking beyond the kit
  - IT Services – ensuring your implementations deliver on time, on budget, on quality
  - Telco's - negotiating fixed line and mobile telephony contracts
- Mid-term benchmarking and renegotiations
- Overview of Vendor Performance Management

## Booking

For course dates, pricing and discounts please see pages 10 to 11.

The booking form is at the back of this document, or you may call 0207 936 4374 to make credit card bookings.

## 2. Negotiation Skills – driving the best deal

### Summary

We explore each of the key stages, with the tools and techniques used at each stage. Through a process based on facts, we remove emotion from the negotiating table and provide a structured approach. We cover all negotiating levers, including, your ideal, realistic and fallback positions. The course culminates in a customer/supplier practice negotiation, run in a safe environment (without video) where delegates can try out the new techniques and receive feedback from our procurement experts.

### Key Benefits

1. *Cost Saving* - avoid making costly mistakes when negotiating IT contracts
2. *Negotiation Success* - understand how to achieve that elusive win-win contract
3. *Ensure ongoing vendor performance* - include risk mitigation, service improvement and price reduction in your negotiations

### Ideal for

- IT managers involved in managing suppliers
- Sourcing Specialists and Commercial Managers
- Project Managers

### Syllabus

- What is negotiation?
- The aims and objectives of an IT Procurement negotiation
- The stages of negotiation
  - When does a negotiation start?
  - Preparation, preparation, preparation
- Negotiation techniques
- Style and Body Language
- Offers and concessions
- Selling & Buying IT: tricks of the trade, including pricing, and some countermeasures
- Putting it into practice: a real-life example
- The Long Run: what happens after the contract is signed?

### Booking

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## 3. Accelerated Tendering – benefit without the pain

### Summary

You will learn how an efficient tender accelerates the process, and how you can buy exactly what you need at market best pricing, without spending months assessing responses when buying mid-value goods and services. The course includes provision of model documents and guidelines

### Key Benefits:

1. *Time management* – understand how to avoid wasting time going back and forth between suppliers to assess solutions
2. *Cost saving* – ensure that you get best market value for mid-tier contracts without months of effort in negotiations
3. *Re-usable materials* – gain a set of model documents to use in your future purchases  
Avoid lengthy contract negotiations

### Audience

- IT managers involved in managing suppliers
- Sourcing Specialists
- Project Managers
- Commercial Managers

### Syllabus

- What is a Request for Proposal and why use it?
- When should you use?
- Short RFP vs. Full RFP
- Timescales for a short RFP
- Phases of the short RFP
  - Requirements and drafting the RFP
  - Managing the Bid Process
  - Evaluation/Scoring
  - Concluding the contract
- Ongoing Vendor Management

### Booking

For course dates, pricing and discounts please see pages 10 to 11.

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## 4. Successful Outsourcing & Procuring IT Services

### Summary

The procurement of large scale IT services can be challenging, with many examples of failed project in the press. This course outlines the fundamentals for ensuring a successful contract and project delivery.

### Key Benefits

1. *Commercial Risk* – understanding the critical risks and how these can be avoided
2. *Cost* – assessing different cost models and how to ensure best value over the changing life of the contract
3. *Timescales* – ways to assure a smooth process running to expected timescales

### Audience

- IT Project and Programme Managers
- Sourcing Specialists
- IT Procurement Managers

### Syllabus

- IT Outsourcing Disasters – why have projects failed?
- What is Outsourcing?
  - Why outsource
  - Types of Outsourcing
  - Outsourcing goals
- Setting objectives and planning
- Defining the need – requirements and the base case
- Approaching the market
  - Identifying appropriate suppliers
  - Number of suppliers to involve
  - Setting boundaries – both internal and external
- Evaluating responses
- Commercials and cost models
- Contract negotiations – use of Letters of Intent and model clauses
- Transition and managing the vendor

### Booking

For course dates, pricing and discounts please see pages 10 to 11.

The booking form is at the back of this document, or you may call 0207 936 4374 to make credit card bookings.

## 5. Advanced Software Procurement

### Summary

Understand successful the range of charging mechanisms used by vendors, how they protect their revenue stream and gain practical advice on how to mitigate the commercial risk inherent in every software contract. The course includes a valuable checklist of negotiation points for any software procurement.

### Key Benefits

1. *Commercial risk* - see the common risk areas and how to avoid them
2. *Cost* – avoid making costly mistakes when negotiating software licences
3. *IPR* – understand it's commercial significance in software negotiations

### Audience

- IT teams managing software vendors
- Software buyers
- Project Managers and Commercial Managers

### Syllabus

- What is a software licence?
- Key features of software licences
  - Shrink-wrap, volume licensing, subscription
  - Software licence & development agreements
  - Escrow
- Key commercial considerations for buying software
  - Cost models
  - Pricing strategies of software suppliers
  - Tools to probe cost, overheads and profit
- Core Contractual clauses
  - IPR ownership and Modifications
  - IT warranties
  - Warranty exclusions including loss of data, minor interruptions or errors
  - Service descriptions, change management, software support
- Commercial implications of using Open Source Software
- The software buyers checklist

### Booking

For course dates, pricing and discounts please see pages 10 to 11.

The booking form is at the back of this document, or you may call 0207 936 4374 to make credit card bookings.

## 6. Vendor Performance Management

### Summary

A wide portfolio of IT vendors requires careful management to extract the best value and keep your risk as low as possible. Course delegates will gain the skills and techniques to drive exemplary performance from their vendors. During the course we will identify which suppliers need full vendor management and why, undertake a formal vendor risk assessment, and gain an understanding of contractual risk and how to handle it.

### Key Benefits

1. *Continual improvement* - understand how to drive high and improving vendor performance
2. *Performance Issues* – learn how to close these down before they snowball
3. *Time saver techniques* - Prioritise the right activities with the right vendors

### Audience

- IT managers involved in managing suppliers
- Sourcing Specialists and Commercial Managers
- Project Managers

### Syllabus

- Vendor Performance Management defined
- Examining failure – case studies of poor performance and its effect
- Why manage vendors after contract signature?
- Turnstone Categorisation of Vendors - The Relationship Spectrum
- Attitude and approach
- Activities within Vendor Performance Management
- Controlling cost variation
- Conducting Performance Reviews
- Solving Performance Issues
- Vendor Risk Assessment

### Booking

For course dates, pricing and discounts please see pages 10 to 11.

The booking form is at the back of this document, or you may call 0207 936 4374 to make credit card bookings.

## **7. Basic Tendering**

Due for Launch Q3 2010, please check back with us

## **8. Procuring Telecoms in a competitive market**

Due for launch in Q3 2010, please check back with us

## **9. Procuring Hardware – easier, cheaper faster**

Due for launch in Q4 2010, please check back with us

## **10. OJEU procurement: compliance and competition**

Due for launch in Q4 2010, please check back with us

## Pricing

The flat rate for a single delegate on a course is £975.

Our discount structure applies on a sliding scale to the *total* number of courses booked.

So this will apply whether you wish to book one delegate on several courses, or many delegates onto one course. The discount break points are shown in the table below.

Total Number of courses booked*	Cost per Course per Delegate
1 to 3	£975
4 to 7	£925
8 +	£850

\*This is calculated as the total number booked within any twelve month period.

If you require bespoke in-house training, please contact us to discuss your particular needs. To hear more about any of the courses please contact Alex Sandercock on 0207 936 4374, or email [alex.sandercock@turnstoneservices.com](mailto:alex.sandercock@turnstoneservices.com).

See over for the course schedule and for the booking form.

## Course Schedule

	<b>September</b>	<b>October</b>	<b>November</b>
<b><i>1. IT Commercial Awareness</i></b>	Mon 6th Sep	Mon 25th Oct	Mon 15th Nov
<b><i>2. Negotiation Skills in IT</i></b>	Tues 7th Sep	Tues 26th Oct	Tues 16th Nov
<b><i>3. Accelerated Tendering</i></b>	Weds 8th Sept	Weds 27th Oct	Weds 17th Nov
<b><i>4. Successful IT Outsourcing</i></b>	Thurs 9th Sept	Thurs 28th Oct	Thurs 18th Nov
<b><i>5. Advanced Software Procurement</i></b>	Fri 10th Sept	Fri 29th Oct	Fri 19th Nov
<b><i>6. Vendor Performance Management</i></b>	Fri 10th Sept	Fri 29th Oct	Fri 19th Nov

## Training Course Booking Form

*Fill out and fax back to 0207 936 4373 or scan/email to alex.sandercock@turnstoneservices.com*

Point of Contact	
Your Name	
Company Name	
Email Address	
Office Address	

Delegate Information					
No.	Delegate Name	Role in Company	Delegate Email Address	Course Number	Course Date
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					

*Please continue on a separate sheet if required*

Billing Details	
Unless courses are paid by credit card, invoices for bookings will be sent to the Billing Contact Email Address for payment. Please add any purchase order details necessary below.	
Purchase Order Number	
Billing Contact Name	
Billing Contact Email Address	
Invoice Address	
Billing Contact Phone number(s)	

By returning the completed form, you agree to accept the terms and conditions overleaf.

A VAT invoice and joining instructions will be issued to acknowledge your booking.  
 Please contact us if you do not receive this within seven days of booking.

Methods of payment are shown in the booking terms and conditions.  
 Invoice payments must be made within the timescales stated in the booking terms and conditions overleaf.

## **Booking Terms and Conditions**

In these Terms and Conditions the following definitions apply:

“Training Provider” means the person or persons delivering the training course

“We” or “Us” means Turnstone Services Ltd

“You” means the customer booking the course

### **Fees**

The fee for an event covers all written materials and refreshments (excluding lunch).

### **Payment Terms**

A VAT invoice will be issued at the point of booking. Payment is due within 30 days of the invoice date or 21 days prior to the first course date, whichever is the sooner. We reserve the right to refuse admission and to release course places if payment is not received on time. You will be informed in writing if this occurs.

Payment may be made by BACS transfer or credit card. Instructions on how to pay are included on the VAT invoice. Payments are fully refundable in the event of cancellation subject to the cancellation conditions below.

All course fees quoted are exclusive of Value Added Tax which should be added to the amount shown at the ruling rate at the time of booking the course. If You fail to make any payment when due we reserve the right to levy a late payment charge calculated at the rate of 2% per month accruing daily from the date the invoice becomes due for payment.

### **Cancellation Charges**

If you need to cancel your booking your cancellation must be received, in writing, at least 21 days before the event. If payment has been made a refund will be arranged. If payment has not been made the booking will be cancelled from our system and we will send you a credit note. Cancellation charges vary with notice period as below and are a % of the original booking fee:

21 days or more before the event 10% + VAT

20 days or less before the event 100% + VAT

An additional invoice will be sent for this charge, together with a credit note or refund in respect of the original invoice.

Note that a substitute delegate can be named at any time before the course begins, without any cancellation charge.

### **Transfer Charges**

If you wish a delegate to transfer to another event your request must be received, in writing, at least 21 days before the event, stating the date, name of the course and delegate you wish to transfer. The new course date must be within six months of the original. Transfer charges vary with notice period as below and are a % of the original booking fee:

21 days or more before the event FREE

20-14 days before the event 10% + VAT

13 days or less before the event 20% + VAT

Please note that a delegate can only transfer twice from an event within 12 months of the original booking. A transfer can only take place once payment has been received.

## **Course Changes**

We reserve the right to improve the specification and format of its courses for your benefit without notice to you.

The location and date of the course will be as advised to you at the time of booking. We reserve the right to change the location of the course and will advise you as soon as this change is known.

We reserve the right to cancel or reschedule any course and will advise you as soon as this change is known. We will use all reasonable endeavours to avoid changes of this nature. When this is unavoidable we will refund in full all monies paid by you, or at your option apply all monies to a rescheduled or alternative course.

## **Warranty and Liability**

You accept that it is your responsibility to verify that the courses are suitable for the requirements of the delegate attending a particular course and that the delegate has the necessary level of competence to be able to achieve the objectives of the course.

Our liability for loss and damage shall be limited to a claim for damages. The maximum aggregate liability will be the charges for the course out of which the loss or damage has arisen. We will not be liable for indirect, special or consequential loss (including loss of anticipated profit or data), howsoever arising, even if we have been advised of such potential loss.

## **Copyright**

The copyright and all other intellectual property rights in all course materials shall remain the sole and exclusive property of Turnstone Services Ltd. You undertake that you will not copy or permit the photocopying of course materials, nor disclose or permit the disclosure or sell or hire the same to third parties, nor use the same for running your own courses.

## **Important Note**

Your completed booking form and these terms and conditions form a legally binding contract. If the programme takes place but you are unable to attend, whether for reasons within or beyond your control, the above conditions in relation to transfers and cancellations will apply.

We accept no responsibility for loss occasioned to any person acting or refraining from action as a result of the information disclosed by the Training Provider during the event.

All bookings on our events are subject to the above terms and conditions and your acceptance of them constitutes a legally binding contract under English law. You will be deemed to have accepted the terms and conditions at the time of booking by signing and returning our booking form, unless we hear from you within five days of you returning the signed booking form.