



# Working with Strategic Business Partners



## Description:

**Working with Strategic Business Partners** discusses how to engage and set expectations when working with vendors. Many of the project management practices materials in managing internal projects apply equally to working with parties outside of the State of California. The key difference is the legal and contractual relationship between the vendor and the State. Specification, contract, and logistics are addressed in this module.

- How do we locate and qualify strategic business partners?
- Who specifies what is to be delivered by the strategic business partner?
- What are the differences between contract management and project management?
- What are our contracts options in working with strategic business partners?
- How do we verify products developed by strategic business partners?

As part of this module, participants learn that working with outside business partners requires more communication, especially if they're off-site. Expectation setting both internally and with the business partner is key to a successful working relationship. There is often a longer ramp up time due to geographic location and training on development practices required by the State of California. Participants learn a proven approach for qualifying business partner prior to contract development.

## Duration:

2 days

## Learning Objectives:

- Identify when a contract solution is strategically advantageous
- Set and manage vendor expectations
- Identify prerequisites for contract negotiation
- Understand contracting options available within the State of California
- Identify solicitation documents and when each are most effective
- Identify contract types and their inherent risks
- Understand the relationship between specifications and contract development
- Define project deliverables and acceptance criteria
- Conduct vendor selection and qualification reviews
- Clearly define the tie between performance and payment for work accomplished
- Conduct contract management and oversight to ensure project success
- Understand what activities are conducted at contract closeout

## PMBOK® Guide Areas Covered:

Participants are eligible for 14 PDUs.

Project Scope Management  
Project Time Management  
Project Cost Management  
Project Quality Management  
Project Risk Management  
Project Procurement Management

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**Topics  
Covered:**

**MODULE OBJECTIVES**

- What is a Strategic Partnership?
- Benefits of Collaboration
- Challenges to Collaboration
- When to Do It Yourself
- When to Acquire

**SOFTWARE ACQUISITION CYCLE**

**1. PLAN THE ORGANIZATIONAL STRATEGY**

- 1.1 Initiate a planning process
- 1.2 Set the organizational strategy
- 1.3 Establish general practices

**2. IMPLEMENT THE ORGANIZATION'S PROCESS**

- 2.1 Establish a software acquisition process
- 2.2 Include contracting practices
- 2.3 Obtain services from other organizations
- 2.4 Assign responsibility for success of software acquisition process
- 2.5 Tailor the process

**3. DEFINE THE SOFTWARE REQUIREMENTS**

- 3.1 Define the software being acquired
- 3.2 Establish proposal evaluation standards
- 3.3 Establish acquirer and supplier obligations
- 3.4 Develop plans to evaluate and accept software and services
- 3.5 Develop contingency plans

**4. IDENTIFY POTENTIAL SUPPLIERS**

- 4.1 Gather information on available software products
- 4.2 Evaluate software during a demonstration
- 4.3 Survey users of the supplier's software
- 4.4 Review performance data from previous contracts
- 4.5 Survey several suppliers' offerings

**5. PREPARE CONTRACT REQUIREMENTS**

- 5.1 Determine the quality of the work
- 5.2 Determine how payment is to be made
- 5.3 Determine nonperformance remedies
- 5.4 Prepare contract provisions
- 5.5 Review contract provisions with legal counsel

**6. EVALUATE PROPOSALS AND SELECT SUPPLIER**

- 6.1 Evaluate supplier proposals
- 6.2 Visit supplier facilities
- 6.3 Select a qualified supplier
- 6.4 Negotiate the contract

- 7. MANAGE SUPPLIER PERFORMANCE**
  - 7.1 Manage the contract during execution
  - 7.2 Monitor supplier's progress
  
- 8. ACCEPT THE SOFTWARE**
  - 8.1 Evaluate and test the software
  - 8.2 Maintain control over the test
  - 8.3 Establish an acceptance process
  
- 9. USE THE SOFTWARE**
  - 9.1 Evaluate contracting practices
  - 9.2 Evaluate user satisfaction
  - 9.3 Evaluate supplier performance