



ISM<sup>®</sup>  
Corporate Training  
Expert Knowledge. Engaging Content.



## ISM Corporate Training

Professional Development. Corporate Growth.

As we adapt to changing workspaces, we must continue to be forward-thinking organizations, building agile teams with a broad understanding of end-to-end supply chains to maintain our competitive advantage. ISM's Corporate Training will infuse both onsite and remote teams with cross-functional skills and enable them to lead through the changing global landscape.

Pick the delivery method that works for you, either in person or live on-line in the virtual classroom. Choose from an array of topics to meet the needs of your team. With powerful instruction and state-of-the-art content that aligns with the core competencies of the ISM® Supply Chain Capability Model, ISM is the education partner of choice.

Corporate Training is delivered in full day sessions over the course of multiple days. All courses are highly interactive and include actionable lessons that engage your employees through every step. Participants will earn one CEH for every hour of class attendance.

Whether you are closing immediate skills gaps or building your team's knowledge for the future, ISM has you covered.



### Continuing Education Hours

Earn 1 CEH for every hour of class attendance



### Maximize Learning

Practical exercises to engage participants and maximize your team's learning potential



### Live, Expert Instructors

Led by experts with extensive knowledge in the supply management profession

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# ISM Learning: The Power of Education

Supply management is much more than a profession — it is a core element of any local economy and an essential part of the global path ahead.

Forward momentum on that path is achieved in many ways, one being the ongoing development of yourself and your team. Continuing education is not only important for the engagement and retention of your employees; it ultimately contributes to your organization's success.

With any plan, mapping a route — a path to success — provides the best results. ISM education products are designed to support our signature product, the ISM® Supply Chain Capability Model, a comprehensive set of competency-based standards of excellence for supply management professionals worldwide.

Our Corporate Training courses are built around this framework, supporting 16 core competencies and more than 70 sub-competencies. The ISM catalog of courses contains content appropriate for each Supply Chain Capability Model career maturity level (Fundamental, Proficient, Advanced and Mastery), providing flexibility to create learning plans specific to your needs and those of your team.

To help determine the appropriate level training required, ISM also offers the Institute for Supply Management®'s (ISM®) Capability Models and Assessments. These comprehensive assessments, aligned to specific functional areas and job roles, are designed to measure your team's current levels of ability, identify skill gaps, and help to create a roadmap to close skill gaps and accomplish organizational goals. To learn more about ISM Capability Models and Assessments, see page 25.



## ANALYTICS FOR SUPPLY MANAGEMENT

Timely and accurate information is the lifeblood of procurement. It is crucial that you have the knowledge and skills to get the most out of business information. Analytics can drive better outcomes for both your bottom-line profit and your top-line revenue. This course can be customized based on your organizations needs to cover fundamentals or more advanced learning objectives.

**Duration:** 14 hours

**Pework:** None

### **Learning Objectives:**

**Mega Trends in Procurement and Supply Chain.** Understanding the strategic impact and transformation of supply management in a global eco-system.

**Price-Cost Analysis.** Establishing the fundamentals of both price and cost, including the differentiating factors.

**Supplier Segmentation.** Developing segmentation profiles and strategies for all suppliers.

**Supplier Pricing.** Understanding of the drivers supplies use on customers.

**Cost Analysis Techniques.** Determine options to optimize costs for the business organization.

**Supplier Market Analysis.** Applying market analysis techniques (STEPP, SWOT, Basic, Advanced) to understand market dynamics.

**Supplier Financial Analysis.** Reviewing supplier financial health to set sourcing plan.

**Business Requirement Analysis.** Leveraging strategic business objectives to provide organizational needs vs wants.

**Supplier Strategies on Spend.** Establishing best use of resources to optimize opportunities.

**Stakeholder Management.** Identifying, engaging and managing stakeholders in a sourcing event.

**Conditioning.** Understanding when and how to engage appropriate internal stakeholders and suppliers.

# CATEGORY MANAGEMENT

Overseeing and maximizing the financial and operational value of a group of related commodities, products, or services by identifying and monitoring total spend and consumption is the foundation of Category Management. Gain insight and increase your knowledge base with the fundamentals course or take a deep dive with our advanced option.

## Fundamental

**Duration:** 7 hours

**Pework:** None

### Learning Objectives:

#### **Category Management Model and Process.**

Understanding of 6 critical phases of a category management process.

**Spend Analysis.** Establishing spend classifications and categories, including addressable and non-addressable strategies.

#### **Supplier and Customer Segmentation.**

Developing segmentation profiles and strategies for all suppliers, including customer or choice analysis.

**Stakeholder Management.** Identifying, engaging and managing stakeholders in a sourcing event.

**Supplier Market Analysis.** Applying market analysis techniques (STEER, SWOT, Basic, Advanced) to understand market dynamics.

**Strategic Sourcing.** Understanding 8 major phases of a sourcing cycle.

**Price-Cost Analysis.** Establishing the fundamentals of both price and cost, including the differentiating factors.

**Contract Management.** Leveraging phased steps to ensure a contract is administered through the lifecycle.

**Auditability and Compliance.** Identifying legal obligations to monitor and enforce.

#### **Supplier Scorecards and KPI's.**

Understanding best practices to ensure suppliers are delivering performance expectations and continuous improvement.

## Advanced

**Duration:** 14 hours

**Pework:** Bring category spend data to class.

### Learning Objectives:

#### **Category Management Overview.**

Understanding the purpose and steps of the category management process (review).

**Types & Addressable Spend.** Using spend classification and categorization and determining addressable spend v. non-addressable.

**Spend Segmentation.** Applying the Pareto principle and A, B, C analysis with actual data.

#### **Supplier Engagement Strategies.**

Understanding the type of supplier you are engaging with, how they view your organization and the proper engagement strategy.

**Advanced Market Analysis.** Using market analysis techniques, such as SWOT, STEER, Porter's five Forces including trend analysis.

**Price & Cost Analysis.** Understanding cost information sources, using the data and practicing challenging supplier pricing or stated costs.

**Total Cost of Ownership.** Using TCO to understand and evaluate supplier costs and capabilities.

**Should Cost Analysis.** Understanding should cost techniques and application.

**Cost, Cash & Risk.** Evaluating the trade-offs of cost, cash flow and risk in managing a category.

**Category Plan.** Creating a category plan, identifying stakeholders to engage and manage.

**Action Plan.** Using the tools and techniques to achieve a measurable result.

# CERTIFIED PROFESSIONAL IN SUPPLY MANAGEMENT®(CPSM®)

Built on an in-depth analysis of supply management functions across industries, the CPSM program addresses the realities of supply management, as well as workplace complexities. The CPSM covers globalization, use of technology, and expanded competencies that supply management professionals employ to drive value in their organizations. These courses will prepare you for your CPSM exams and certification eligibility.

## Supply Management Core

**Duration:** 14 hours

**Prework:** None

### Learning Objectives:

**CPSM Certification Overview.** Understanding the strategic impact and transformation of supply management in a global eco-system.

**Sourcing.** Determining methods to process requirements for goods or services based on cost, timing, existing contracts and competitive bidding, as appropriate.

**Category Management.** Creating a category management plan to meet the organization's key objectives

**Negotiation.** Preparing negotiation plan that aligns with organizational objectives.

**Legal and Contractual.** Generating and following supply management processes to ensure legal compliance.

**Supplier Relationship Management.** Developing and managing effective relationships with suppliers.

**Cost and Price Management.** Developing cost and price management program strategies for purchases.

**Financial Analysis.** Preparing and/or administering a supply management department budget and financial strategies.

**Test Taking Techniques.** Learning best practices for taking a timed exam.

## Supply Management Integration

**Duration:** 14 hours

**Prework:** None

### Learning Objectives:

**CPSM Certification Overview.** Understanding the strategic impact and transformation of supply management in a global eco-system.

**Supply Chain Strategy.** Determining how to structure the supply chain in support of the organization's objectives and goals.

**S&OP: Demand Planning.** Establishing business processes to optimize sales, inventory and capacity requirements.

**S&OP: Forecasting.** Factoring global variables to create internal forecasts.

**S&OP: Product and Service Development.** Understanding business requirements proactively to add strategic value to product and service lifecycles.

**Quality Management.** Determining variability and capability within the supply management.

**Logistics and Materials Management.** Implementing optimized solutions for product transportation and storage.

**Project Management.** Realizing best practices to managing projects across the supply chain and organization.

**Test Taking Techniques.** Learning best practices for taking a timed exam.

# CERTIFIED PROFESSIONAL IN SUPPLY MANAGEMENT®(CPSM®)

(Continued)

## Leadership and Transformation in Supply Management

**Duration:** 14 hours

**Pework:** None

### Learning Objectives:

**CPSM Certification Overview.** Understanding the strategic impact and transformation of supply management in a global eco-system.

**Leadership and Business Acumen: Strategy Development.** Establishing strategic strategies aligned to business objectives.

**Leadership and Business Acumen: Stakeholder Engagement.** Leveraging stakeholders to achieve strategic result.

**Leadership and Business Acumen: People Development and Coaching.** Developing strategic supply management talent.

**Systems Capability and Technology.** Understanding capabilities to implement strategic solutions.

**Risk and Compliance.** Managing risks within the global eco-system.

**Corporate Social Responsibility.** Learning best practices to utilize for ethics, sustainability and social responsibility.

**Test Taking Techniques.** Learning best practices for taking a timed exam.



# CONTRACTING

Contracts guide key aspects of business strategies and relationships. Many organizations spend a considerable amount of time and resources writing, reviewing and managing contracts. Having deeper knowledge of terms and conditions will protect your organization from legal risk. This course will build and expand your contracting knowledge to ensure positive outcomes for your organization.

## Fundamental

**Duration:** 7 hours

**Pework:** None

### Learning Objectives:

#### Contracts within Strategic Supply

**Management.** Understanding the purpose and steps of contracting, including contract connections upstream and downstream in the supply chain.

**Contracting Fundamentals.** Developing contracts in the sourcing cycle including types and elements of a contract, types of laws, IP consideration, solicitation types, T's & C's and redlining.

#### Understanding the Purchase/SOW.

Discovering key elements of a comprehensive purchase and statement of work that will meet compliance requirements.

**Stakeholder Management.** Identifying, engaging and managing stakeholders throughout the contract lifecycle

#### Service Level Agreements and Scorecards.

Understanding best practices to ensure suppliers are delivering performance expectations and continuous improvement.

#### Supplier Relationship Management.

Clarifying expectations to optimize the business relationships between supplier and stakeholder.

**Contract Administration.** Leveraging phased steps to ensure a contract is be administered through the lifecycle.

**Effective Communications.** Determining various methods to have difficult conversations and effective listening.

## Advanced

**Duration:** 14 hours

**Pework:** Come to class with a sample contract, SOW or other form of legal document that you will use for class participation.

### Learning Objectives:

**Overview of Contracting.** Understanding of types and uses of contracts in supply management, (POs, blanket orders, SOW, etc.) review.

**Laws – Advanced.** Deeper dive into laws impacting contracts.

**Contact Clauses.** Developing a detailed understanding of a variety of contract clauses (T's & C's ) for goods and services.

**Statements of Work.** Developing SOW for services provided, practicing development.

**Performance Clauses.** Identifying meaningful KPIs and SLAs and monitoring techniques.

#### Contracts in the Sourcing Process.

Understanding the connection to an effective sourcing and negotiation strategy; and administering the contract throughout its life-cycle.

**Engaging Stakeholders.** Having difficult conversations with stakeholders around contracting, performance metrics and roles in the process of contracting.

**Contract Negotiating.** Practicing contract negotiations to improve capabilities.

**Action Plan.** Using tools and techniques to achieve a measurable result.



# CORPORATE SOCIAL RESPONSIBILITY (CSR) AND ETHICS SUSTAINABILITY

The importance of supply chain sustainability has been growing in recent years with consumers increasingly prioritizing environmental and social responsibility. In response, companies are recognizing the benefits of sustainable practices for their bottom line. From green procurement and sustainable packaging to energy efficiency and waste reduction, there are many ways that companies can address sustainability in their supply chain. Learn how to build a sustainable supply chain and help your organization to reduce costs, improve its reputation, and build stronger relationships with suppliers and customers.

## Fundamental

**Duration:** 14 hours

**Pework:** None

### Learning Objectives:

**Sustainability Overview.** Understanding sustainability and the path to net zero.

**Regulatory Framework.** Understanding the national and international regulations and standards that provide guidance on sustainable procurement.

**Sustainability Priorities.** Discerning sustainability priorities into supply chain management.

**Enterprise Gains.** Identifying the benefits of a sustainable procurement organization.

**Organizational Culture.** Recognizing that leadership and culture are key to success.

**Risk Management.** Apply risk management to ESG (environmental, social, governance) related risks in procurement.

**Supplier Selection Strategies.** How to select sustainable suppliers.

**Integrating Sustainability.** Embedding sustainability into procurement processes and decision-making.

**Services Sourcing.** Sustainable product and service procurement.

**Execution and KPI's.** Sustainable procurement implementation and measurement.

**Evolving Sustainable Procurement.** Continuous improvement and innovation in sustainable procurement

# COST AND PRICE MANAGEMENT

When managing a firm's budget and various projects within it, cost management is imperative to controlling expenses and monitoring predicted and actual costs. It is key to analyze financial data, benchmarking metrics, and supply data to understand supplier's financial situation and market position. Learn differences between cost management and price management, and when to leverage each to optimize a business result. Also gain in-depth knowledge on the aspects of financial analysis with this course.

**Duration:** 14 hours

**Prework:** None

## **Learning Objectives:**

**Cost & Price Overview.** Understanding the uses of cost & price management and financial analysis in supply management.

**Stages of Cost & Price.** Learning the continuum stages and identifying the organization's progress.

**Deconstructing Price with Cost.** Leveraging cost analysis methods to challenge prices.

**Cost Drivers.** Uncovering critical data to create sensitivity analysis and should cost models.

## **Total Cost of Ownership (TCO).**

Understanding total supply chain costs and associated risks.

**Ratio Analysis.** Developing a basic understanding of the importance of financial ratios.

**Profitability Ratio Analysis.** Practicing calculating profitability ratios and gaining insights into a supplier.

**Efficiency Ratio Analysis.** Practicing calculating efficiency ratios and gaining insights into a supplier.

**Action Plan.** Using tools and techniques to achieve a measurable result.

# FINANCIAL ANALYSIS

Analyzing financial data, benchmarking metrics, and supply data to understand supplier's financial situation and market position will ensure your organization can develop and execute an appropriate supplier engagement strategy. Learn how to analyze supplier financial health to protect your organization. Gain in-depth knowledge on the aspects of financial analysis with this course.

**Duration:** 7 hours

**Pework:** None

## **Learning Objectives:**

**Financial Analysis Overview.** Understanding the uses of financial analysis in supply management.

**Sources of Data.** Identifying sources of data for public and non-public suppliers.

**Profit & Loss Statements.** Understanding the framework of P&L statements.

**Balance Sheets.** Becoming capable of reading and interpreting a balance sheet.

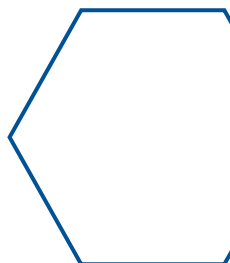
**Ratio Analysis.** Developing a basic understanding of the importance of financial ratios.

**Profitability Ratio Analysis.** Practicing calculating profitability ratios and gaining insights into a supplier.

**Efficiency Ratio Analysis.** Practicing calculating efficiency ratios and gaining insights into a supplier.

**Financial Analysis and Negotiations.** Understanding the use of financial knowledge in negotiations with suppliers, practicing the use of insights.

**Action Plan.** Using tools and techniques to achieve a measurable result.



A woman with short dark hair, wearing a grey top and dark pants, stands in a modern office setting, smiling and gesturing towards a whiteboard. She is addressing a group of people seated at a table. The whiteboard has a table with three columns: 'In progress', 'Todo', and 'DONE'. The 'In progress' column lists 'online platform' and 'line placement'. The 'Todo' column lists 'online base 100%', '20% Online biz', and 'Todo list end'. The 'DONE' column lists 'Online portal', 'Patched up', and 'Placement'. A large pink circle with the text '87%' is overlaid on the image.

87%

of millennials  
say professional  
development or  
career growth  
opportunities are  
very important.

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Source: [medium.com](https://medium.com)

# LOGISTICS AND MATERIALS MANAGEMENT

Logistics and materials management is an organizational approach used to integrate the supply management functions within a company. It involves the planning, acquisition, flow and distribution of production materials from the raw material state to the finished product. This course will focus on procurement, inventory management, warehousing/logistics and production planning.

**Duration:** 14 hours

**Pework:** Come to class with data on demand and inventory levels for a product in high demand.

## **Learning Objectives:**

### **Overview of Materials Management.**

Understanding the flow of materials / inventory and the value of managing it efficiently (review).

### **Materials Handling Improvements.**

Receiving, flow of materials (picking, kitting, etc.), warehousing improvement opportunities.

**Parameters Identifying.** Inventory drivers, strategic stock, safety stock, minimum stock levels, target customer service levels, lead times, demand variability, etc.

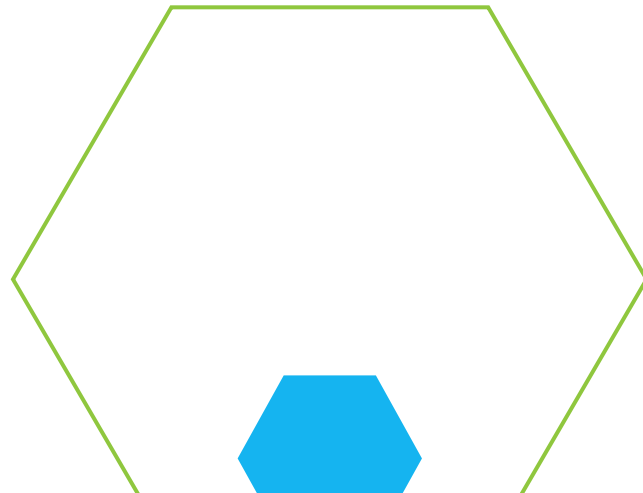
**Demand and Inventory.** Understanding independent versus dependent demand, MRP's role, etc.

**Advanced Inventory Segmentation.** Applying 10-Box, cycle counts, replenishment methods to gain knowledge of current performance levels.

**Inventory Strategies.** Developing appropriate inventory management strategies give the demand profile for the material.

**SLOB's.** Addressing slow moving, excess and obsolete stock costs.

**Action Plan.** Using tools and techniques to achieve a measurable result.



# LOGISTICS BOOTCAMP

Build a base of logistics knowledge in a focused two-day educational experience. Logistics Bootcamp imparts knowledge and presents tools that will help participants excel in the dynamic world of logistics. Logistics is the process of efficiently moving goods from point of origin to its destination. The process encompasses planning, storing, and transporting products, ensuring they arrive when promised and at the required level of quality. The focus of this course is an integrated supply chain approach that optimizes the process for the benefit of the organization and customers. You will gain skills to optimize processes, manage resources effectively, and contribute to a smooth-running supply chain, in a focused and accelerated timeframe.

**Duration:** 14 hours

**Pework:** None

## **Learning Objectives:**

**Basics of Logistics.** Overview of the basics and illustrate the place of logistics in the end-to-end supply chain.

**Demand Planning.** Forecasting future customer demand, and ensuring businesses have the right inventory to meet it.

**Asset & inventory Management.** Tracking, and safeguarding, the physical resources of the enterprise, which includes production components and tangible capital assets.

**Receiving & Warehouse Management.** Ensuring efficient and safe acceptance, stocking, storage, and retrieval of goods within warehouse facilities.

**Supplier Managed & Just-in-Time Inventory.** Review of inventory replenishment techniques that “pull” material from suppliers using forecasting techniques and visual or system signals.

**Global Logistics and Transportation.** Understand multiple variables to successfully move material across the global supply chain.

**Advanced Logistics.** Changes in the business environment have forced companies of all sizes to improve the efficiency and effectiveness of their logistics processes.

**Reverse Logistics.** Understand the management, return, reuse, or disposal of unwanted goods back up the supply chain.

**Emerging Trends & Technology in Logistics.** Discover where logistics is headed in response to rapidly evolving Customer needs and global marketplace changes.

**Sourcing Logistics Services.** Present the fundamentals of sourcing logistics/transportation services from definition of the recognition of need to supply selection/onboarding to tracking results.

**Stakeholder Management.** Identifying conditioning messages received and how to influence others with conditioning. Using planning templates to improve negotiation organization and results.



# NEGOTIATION

Negotiation skills not only influence individual purchases, but also business relationships. It is an exploratory and communication process that identifies interests, walkaway alternatives and options.

## Fundamental

**Duration:** 7 hours

**Pework:** None

### Learning Objectives:

**Negotiation Overview.** Understanding the purpose of negotiations for supply management professionals.

**Types of Negotiations.** Introducing tactical, strategic and elements in each type of negotiation.

**Steps in Negotiation.** Understanding the seven steps in negotiation.

**Conditioning.** Introducing the influencing techniques of conditioning and practicing them.

**Negotiation Styles.** Understanding your style, how to leverage it and the need to shift styles.

**Information in Negotiations.** Gathering data and information to prepare for a negotiation.

**Practicing.** Role playing and practicing your approach before the actual negotiation.

**Conducting a Negotiation.** Learning the right techniques to suit the negotiation.

## Advanced

**Duration:** 14 hours

**Pework:** Identify a supplier negotiation (past, present or future), for application in the activities planned.

### Learning Objectives:

**Negotiation Overview.** Understanding the purpose of negotiations for supply management professionals and the different types of negotiations.

**Steps in Negotiation.** Understanding the seven steps in negotiation.

**Negotiation Strategies.** Selecting the right strategy to engage the supplier in a negotiation.

### Conditioning and Information Control.

Deep dive into the influencing techniques of conditioning, persuasion techniques and practicing them.

### Negotiation Styles for You and Your Team.

Understanding your style, how to leverage it and the need to shift styles as well as organizing the right team for the negotiation.

**Cost Information in Negotiations.** Gathering and using cost data and information to prepare for a negotiation and during the negotiation.

**1:1 Negotiation.** Understanding and practicing techniques for 1:1 negotiating.

**Stakeholder Management.** Managing stakeholders leading up to and during a negotiation and influencing them.

**Team Negotiation.** Understanding team dynamics in a negotiation, roles, etc.

**Advanced Negotiation Planning.** Using ISM planning templates in preparation for a negotiation with a difficult supplier.

**Negotiation Post-Mortem.** Learning from negotiations and feeding the continuous improvement processes.

**Action Plan.** Using the tools and techniques to achieve a measurable result.



# PROCUREMENT BOOTCAMP

Procurement is an organizational function that covers a multitude of business functions. This includes specification development, value analysis, supplier market research, negotiation, buying activities, contract administration and inventory management. This course will provide a holistic approach to managing your supply chain. This course can be customized based on your organizations needs to cover fundamentals or more advanced learning objectives.

**Duration:** 14 hours

**Pework:** None

## Learning Objectives:

### Category Management & Sourcing.

Introduction and expectations for the program; review the role of category management and the sourcing process.

**Business Requirements.** Addressing business requirements, distinguishing needs versus wants, instructional video on needs versus wants, and an activity around priorities.

### Price & Cost Development and Roles.

Understanding when focus on Price is appropriate and focus on Cost is worth the effort; identifying the stage of Price & Cost and your role activity.

### Supplier Segmentation and Analysis.

Determining the type of supply relationship you are in with your supplier, and the appropriate approach and behaviors given each type activity.

**Supplier Engagement Strategies.** Taking supplier segmentation and adding how they view you as a customer to arrive at the best engagement strategy for the situation as an activity.

**Supply Market Analysis.** Practicing techniques for analyzing the market dynamics, (SWOT, Porter's Five Forces), from basics to projecting trends activity.

**Financial Analysis.** Analyzing supplier financial statements, performing ratio analysis and gaining insights for use in risk management and negotiation prep activity.

**Negotiation Introduction.** Understanding the seven steps to negotiation, and the impact that natural negotiation styles have on the approach and outcomes, with styles activity.

**Conditioning and Influencing.** Identifying conditioning messages received and how to influence others with conditioning.

**Negotiation Planning.** Using planning templates to improve negotiation organization and results, applying tools and techniques through a complex case study activity.

**Negotiation Styles.** Identifying your natural negotiation style, how to leverage it, how to shift it and practicing style management in a 1:1 negotiation activity.

**Present Negotiation Plans.** Team presentations of case study for negotiation planning.

**Total Cost of Ownership (TCO).** Identifying the useful components of total cost for the category you manage, how to gauge total fixed, variable and semi-variable costs activity.

**Stakeholder Management.** Identifying, engaging and managing stakeholders, mapping their profiles, creating an engagement plan activity and video on information control.

**Supplier Relationship Management (SRM).** Reviewing SRM cycle to management and optimize supplier performance over the contract lifecycle.

**Logistics.** Reviewing options and costs associated with domestic and international logistics.

**RFx.** Understanding the purpose and appropriateness of utilizing an RFI, RFQ, RFP and an activity to discuss best approach to competing the business.

**Negotiation as a Team.** Using the planning templates to prepare for a team negotiation and practicing the roles in an activity.



74%

of employees feel that  
they are not reaching their  
full potential due to lack of  
professional development  
opportunities.

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Source: [medium.com](https://medium.com)

# SOURCING

The goal of sourcing is to obtain the best quality, performance, and service at the right price, with the lowest risk in order to achieve organizational objectives as identified through category management principles. It involves an integrated cycle to provide an optimized solution. This course will take you through step-by-step best practices in sourcing.

## Fundamental

**Duration:** 7 hours

**Prework:** None

### Learning Objectives:

**Sourcing Process Overview.** Understanding the purpose and steps of the Sourcing process.

**Searching for Sources.** Developing the capability to research the market for suppliers.

**Basic Market Analysis.** Applying basic market analysis techniques to understand market dynamics.

**Business Needs.** Understanding the type of source you need to fulfill business requirements.

**Types of RFX's.** Grasping the structure and uses of request for information (RFI), request for quote (RFQ) and request for proposal (RFP).

**Selection Criteria.** Developing the right selection criteria to ensure the appropriate source is chosen.

**Selection Process.** Understanding best practices in the sourcing selection process.

**Negotiating in the Sourcing Process.** Negotiating with down-selected suppliers to ensure the best result (basics).

**Contracting Understanding.** The steps in contracting and ongoing management of contracts.

**Supplier Onboarding.** Beginning the supplier relationship and onboarding process.

**Performance Criteria.** KPIs, SLAs and other ways to ensure sourced supplier delivers as expected.

## Advanced

**Duration:** 14 hours

**Prework:** Prepare data and information around a sourcing event (past, present or future) and bring to class.

### Learning Objectives:

**Sourcing Process Overview.** Understanding the purpose and steps of the Sourcing process (review).

**Advanced Searches for Sources.** Using technology solutions and developing an advanced capability to research the market for suppliers.

**Advanced Market Analysis.** Applying SWOT, STEEP, Porter's Five Forces and trend analysis.

**Challenging Business Needs.** Challenging business needs of the stakeholder to improve the potential sources you can find to fulfill business requirements.

**Use of RFX's and e-Sourcing.** Reviewing the structure and uses of request for information (RFI), request for quote (RFQ) and request for proposal (RFP) as well as e-Sourcing tools.

**Selection Criteria.** Practice developing the right selection criteria to ensure the appropriate source is chosen, using real data.

**Benchmarking.** Using benchmarks to set cost and price expectations.

**Stakeholder Management.** Identifying, engaging and managing stakeholders in a sourcing event.

**Options Generation.** Working with stakeholders to generate options.

**Measures.** Applying metrics to ensure business needs are met and monitoring post-contract.

**Source Plan.** Developing a source plan.

**Final Negotiations.** Prioritizing objectives and plans for negotiating with chosen supplier.

**Action Plan.** Using tools and techniques to achieve a measurable result.

# STATEMENTS OF WORK

Defining appropriate type, level and quality of goods and services will ensure organizational success. Clarity will come through engagement activities with key internal stakeholders and external suppliers. Learn to integrate business requirements and contractual obligations for optimal outcomes.

**Duration:** 14 hours

**Pework:** None

## **Learning Objectives:**

**Overview of Contracting.** Understanding the purpose and steps of contracting, including contract types.

**Supplier Categorization and Segmentation.** Developing segmentation profiles and strategies for all suppliers.

**Legal Requirements.** Realize the legal obligations of a contract and potential litigation impact.

**Understanding SOW.** Clarify full statement of work and include scope of work.

## **Functional Technical Specifications.**

Discover the three distinct types of specification to complete a technical scope.

**Product/Service Development.** Determine the timing, design, requirements, materials identification, services requirements.

## **Developing a SOW with Stakeholders.**

Define touch points, value add, areas for improvement with stakeholders.

**Conditioning Process Review.** Understand when and how to engage appropriate internal stakeholders and suppliers.

## **Version Control and Communication.**

Leverage Spec change communication and improve communication effectiveness.



Companies that offer professional development opportunities have 34% higher retention rates.

Source: Betterbuy.com

# SUPPLIER RELATIONSHIP MANAGEMENT

Effective supplier relationship management requires you to identify different types of supplier relationships and to create proper engagement strategies to drive value. Cost reduction, cash flow, supplier performance, and innovation are all elements of supplier relationship optimization. Learn how to make an impact on your organization through SRM.

## Fundamental

**Duration:** 7 hours

**Pework:** None

### Learning Objectives:

**Overview of SRM Process.** Understanding of the key steps in the process of managing supplier relationships.

**Supplier Segmentation.** Developing an understanding of the types of suppliers and how to segment them into strategic, leverage, bottleneck and routine.

**Customer Segmentation.** Knowing how your supplier views your organization as a customer and whether your company is a customer of choice.

**Engagement Strategies.** Introducing the concept of combining the supplier segmentation analysis and customer segmentation analysis to determine the best engagement strategy with the supplier.

### Prioritization and Differentiation.

Understanding how to prioritize supplier relationships in SRM and differentiate your approach using engagement strategies.

**Practice an Engagement Strategy.** Practicing one of the engagement strategies for a supplier you work with.

## Advanced

**Duration:** 14 hours

**Pework:** Prepare by selecting a cross-section of suppliers you engage to consider multiple strategies for SRM.

### Learning Objectives:

**SRM Overview.** Understanding that SRM has many steps and tools that are utilized to maximize the value to get out of the supplier relationship.

**Supplier Segmentation and Customer Segmentation.** Understanding the view you have of your supplier and how the supplier views your organization as a customer.

**Putting the Segmentation Analysis Together.** Combining the two segmentation approaches creates a 4x4 matrix that suggests specific engagement strategies you may pursue.

**Measurements.** Supplier scorecards can provide data, information and ultimately knowledge for you to better manage the relationship and the value to get from it.

### Identifying Gaps for Improvement.

Understanding gaps to goals is an important practice to include in SRM, so you can identify the most-valued areas of performance to remediate and improve in those areas.

**Supplier Development.** Developing techniques that can help improve a supplier's performance.

**Supplier Conditioning.** Enabling coordination across roles in the organization with a supplier conditioning plan.

**Stakeholder Management.** Identifying, engaging and managing stakeholders, both internal to your organization and external with and engagement plan.

**Creativity and Innovation.** Engaging suppliers in creative ways to increase value. Early supplier involvement (ESI), can be a key (and necessary) element to SRM creativity and success.

**Action Plan.** Using the tools and techniques to achieve a measurable result.

# SUPPLY CHAIN PLANNING AND S&OP

The S&OP process consists of coordinating sales forecasts, demand plans, and capacity planning to arrive at an agreeable plan. Learn how your organization can prepare for changes in market demand, supplier capabilities and competition by integrating the sales and operations functions.

**Duration:** 14 hours

**Prework:** Participants will come to the course with data on demand for a category or commodity.

## **Learning Objectives:**

### **Introduction to Supply Chain Planning.**

Reviewing the demand planning and supply chain network design.

**Cycle Counting.** Discovery of best practices in inventory counting and reporting.

**Inventory Management.** Understanding supplier segmentation, customer service expectations and lead times.

**Materials Management.** Reviewing roles, responsibilities and alignment to demand frequency.

**Demand Patterns.** Evaluating components of demand signals.

### **Demand Planning and Forecasting.**

Reviewing forecast horizons and differentiating business forecasting versus demand planning.

**Inbound Logistics.** Understanding of logistics, receiving and warehousing fundamentals.

**Conditioning.** Determining when and how to engage appropriate internal stakeholders and suppliers.

**Stakeholder Management.** Identifying, engaging and managing stakeholders in a sourcing event.

**S&OP.** Reviewing the full planning cycle.

**Measuring the Process.** Understanding types of measures and target setting.

**Planning as a Process.** Reviewing the cadence for improvement.

# SUPPLY CHAIN RISK

By identifying, analyzing and assessing risk systematically throughout the global supply chain, your organization can prevent issues and mitigate risk factors for the best outcome and minimal impact. Learn how to identify, mitigate and manage risk with this course and improve your overall organizational stability.

**Duration:** 14 hours

**Pework:** None

## **Learning Objectives:**

### **Overview of Supply Chain Risk.**

Understanding of types of risks in the supply chain.

**Data Sources and Analysis.** Identify data sources types of analyses of supply chain risk.

### **Business Requirements and Risk.**

Determining risk inherent in business requirements.

**Advanced Market Risk.** Evaluating market risk using multiple methods, (SWOT, STEEP, Porter's Five Forces).

**Risk Management.** Technologies using technology to better manage risk.

**Risk Modeling.** Modeling and forecasting risk.

**Opportunities and Risks.** Understanding the O's & R's process.

**Action Planning.** Committing to a plan of action to use the tools to manage risk.



# WAREHOUSE AND INVENTORY MANAGEMENT

Monitoring and tracking of raw materials and goods help keep costs low and enable your organization to meet demand. Gain insight into the essential skills required to effectively manage your organization's assets and reduce holding costs.

**Duration:** 7 hours

**Prework:** Participants will come to the course with data on demand for a category or commodity.

## **Learning Objectives:**

### **Introduction to Supply Chain Management**

**Process.** Reviewing supply chain end-to-end processes and drivers.

**Logistics Receiving.** Understanding inbound logistic variables and best practices.

**Warehouse Basics.** Discovering warehouse options, cost drivers and management systems (WMS).

**MRP System.** Determining factors for inventory planning.


**Forecasting Time Horizons.** Identifying dependent and independent demand with scheduling windows.

**Replenishment.** Reviewing strategies to bring inventory to appropriate levels.

**Inventory Classification.** Understanding inventory strategies that comprehend usage rates, variability and frequency of use.

**Cycle Stock and Safety Stock.** Determining types and levels of inventory to minimize risk and optimize costs.

**Slow Moving and Obsolete Inventory (SLOBS).** Developing strategies for dispositioning not required inventory.



Companies that invest in employee training enjoy 24% higher profit margin versus companies who don't.

*Source: Huffington Post*

A man in a dark suit stands on the left, gesturing towards a seated audience. The room has a curved wooden ceiling and large windows in the background. A large green circle is superimposed over the upper part of the image.

40%

of employees who  
don't receive the  
necessary job training  
will leave their  
positions within the  
first year.

# Need help understanding your team's skills-gaps?

Fortune 500 and 1000 organizations have worked with ISM to generate a complete, real-time pictures of organizational maturity and individual talent capabilities through ISM's Capability Models and Assessments.

ISM can work with you to help evaluate each designated employee in their specific role within your organization to identify gaps in core competencies. This helps you gauge your team's level of proficiency from fundamental to mastery knowledge and identify focus areas for development so you can build your training plan and talent roadmap.

**Contact your ISM Corporate Services representative at  
+1 480.752.6276, opt. 9 or [corpinfo@ismworld.org](mailto:corpinfo@ismworld.org) to learn more.**

# ISM Corporate Training

## Close Competency Gaps and Develop Your Team for the Future

Provide your team with engaging courses that foster innovation, teamwork and create efficiency to drive positive results in your organization.



### Speak a Common Language

Team training ensures your team references a common body of knowledge.



### Create an Effective Team

Infuse your team with cross-functional skills that will enable them to lead through a changing economy.



### Develop Your Talent

Provide a greater understanding of the interconnectivity of supply networks and improve strategic ability.




### Improve Engagement

Invest in your team's future and help fast-track their careers.

## Ready to Transform Your Team?

ISM is dedicated to helping your organization succeed. Contact us today so we can discuss your needs and customize a plan that best fits your organizational goals.

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“The future is in how to break out of narrow focus jobs – deepen your teams’ education and broaden their perspective.”

– ISM Thought Leadership Council Member