

2020

# ISO 44001 Overview & RMP - 2 Day Training Workshop

An overview of ISO 44001 collaborative business relationships, framework specification and developing your Relationship Management Plan (RMP)

A two-day workshop designed to help you gain an overview and understanding of ISO 44001 3 phases and the 8 Stages on day 1 and develop your corporate Relationship Management Plan on day 2. The workshop is interactive and will include an online Relationship Management Plan for you to start using during the workshop and continue after the workshop has been completed.



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I look forward to collaborating with you and putting ISO 44001 collaborative business relationship framework specification to work in your business and with your chosen partners.

Sincerely

Jason Hier



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The two day ISO 44001 Introduction workshop is part of an overall training and development programme to help you gain an understanding of ISO 44001, create your corporate Relationship Management Plan and develop an implementation plan with the aim of gaining ISO 44001 certification. Below is the two day agenda that provides you with an overview of ISO 44001 8 Stages (Clauses 3 to 10) and includes a free online ISO 44001 Relationship Management Plan template, which will be used during day 2 of the workshop to create your corporate RMP.

## ISO 44001 Overview and RMP- 2 Day Workshop

The one day ISO 44001 introduction workshop can be hosted at your offices or at a location of your choice.

Discover how the 8 stages in ISO 44001 can help you gain competitive advantage, reduce risk, improve your productivity, cost management and facilitate proactive innovation. Understand the principles and how they can be applied within your business and how you can utilise existing business processes to support you.

During the workshop you will get an online ISO 44001 Relationship Management Plan. You can start using your online ISO 44001 RMP immediately and continue to develop after the workshop has been completed.

### Who should attend?

If you and other people are involved in projects, sales and marketing, working with multiple organisations, supply chain partners, M&A and joint ventures, where working collaboratively will improve overall business performance and deliver mutual value.

### Learning objectives:

- Understand the scope of ISO 44001 and how it can be applied to any size of organisation
- Identify the necessary processes and people behaviours and capabilities to deliver collaborative working
- Understand the 3 phases and the application of the 8 stages within your organisation
- Comprehend the common themes of relationship management
- Identify ways to improve your current and future business relationships
- Discover how to increase the creation of value, performance, share knowledge & the reduction of risk
- Develop a corporate Relationship Management Plan to gain ISO 44001 accreditation

### The benefits:

- Gain an understanding of ISO 44001
- Develop a collaborative knowledge system
- Develop your Relationship Management Plan
- Discover your collaborative capabilities
- Reduce risk & create new value
- Identify and select partners
- Free online RMP which will be used to develop your corporate RMP

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## Workshop Agenda

The workshop format is broken down into the following modules with an overview followed by a discussion/exercise to help further understand each stage.

### Day 1 – An overview of ISO 44001

**9:00 Introductions** – An overview of ISO 44001 process, types of collaboration, the benefits including a collaborative working exercise

**9:45 Relationship Management Plan (RMP)** – the two types of RMP, its purpose, the contents, structure and development

**10:15 Stage 1 Awareness** – what are the areas you need to focus on and align with your business strategy to verify collaborative working is appropriate for you

### 10: 45 Coffee Break

**11:00 Stage 2 Knowledge** – Determining that collaborative working is right for you, you will develop specific strategies and risk management to deliver the outcomes

**11:45 Stage 3 Internal assessment** – working collaboratively means you need to understand your weaknesses and strengths from an organisation and people perspective. Understand the “soft issues” and establish your collaboration profile and understand what your ideal partner would look like

### 12:30 – Lunch

**1:15 Stage 4 Partner selection** – using the previous stages will help you to identify potential collaborative partners, understand their collaborative profile, the selection process, establishing common objectives and

the type of negotiation strategy to select a partner

**2:00 – Stage 5 Working together** – identify what are the joint ways of working, organisational structure and people competency, roles and responsibilities, joint risk management, communication, knowledge plan and process improvement review. Establish contracting arrangements, monitor and measure.

**2:45 - Stage 6 Value creation** – you need to make sure the relationship does not go “flat”. Develop a joint value creation process using innovation groups, to identify areas for improvement. Agree definitions of value learn from experience and generate innovative ideas

### 3:30 Tea Break

**3:45 Stage 7 Staying together** – This will involve you jointly measuring and monitoring, providing management support for value creation, innovation, managing behaviours and trust including issue resolution and maintaining a joint exit strategy.

**4:30 Stage 8 Exit strategy** – Establish the boundaries, monitor changes and establish triggers that initiate the end of the relationship. You need to ensure business continuity is maintained with an effective transition during the exit leaving the “door open” for future opportunities

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**5:15 After Action Review** – Agree follow up actions, what worked well during the workshop and what could be improved.

**5:30 Finish**

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**Day 2 – Developing Your Relationship Management Plan (RMP):** Workshop attendees will establish a first draft of their Corporate RMP which will act as a Collaboration Strategy and template for specific projects and business relationships.

**9:00 Online RMP Template** – A review of the online ISO 44001 Relationship Management Plan template and examples of RMP's

**9:30 General** – Start to populate your RMP with your business objectives, responsibilities, including governance and team charter

**10:15 Awareness** – Identify your SER, business objectives and drivers, complete a benefits analysis, identify existing assets, initial risks, barriers and resource requirements

**10:45 Coffee Break**

**11:00 Knowledge** – Identify models, your performance objectives, levels of authority, potential partners, risk, continuity and communication plans

**11:45 Internal assessment** – Identify your strengths and weaknesses, collaboration profile, collaboration development plans and a partner selection criterion

**12:30 – Lunch**

**1:15 Partner selection** – Incorporate your assessment process of potential partners, surveys, selection plans, methodology for evaluating collaborative capabilities and culture and evaluations of selected partner

**2:00 – Working together** – Identify your key areas of concern or constraints with potential organisations, joint processes, systems, tools to manage knowledge and information flows across relationships (confidentiality); create a joint programme to assess skills, include

continuous improvement programmes and joint risk and opportunity management

**2:45 - Value creation** – Identify your innovation and value creation processes to be utilised, a continual improvement programme and typical key metrics and measures for you to monitor and maintain; establish a value creation register

**3:30 Tea Break**

**3:45 Staying together** – Establish what the joint review programmes will be, performance measurement and reporting; issues resolution and escalation, process to measure and maintain/improve behaviours

**4:30 Exit strategy** – Develop an exit strategy and identify the triggers for you to disengage from a business relationship.

**5:15 After Action Review** – Agree follow up actions, what worked well during the workshop and what could be improved.

**5:30 Finish**

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## Commercial

### Costs

The cost for a Two Day ISO 44001 Introduction Workshop to be conducted at your organisation facility/site is £800 per participant excluding VAT and expenses. A minimum of 3 and maximum of 12 attendees.

This includes course templates and an online ISO 44001 Relationship Management Plan template for you to use during and after the workshop. Further ISO 44001 templates and support can be provided upon request for an additional cost.

If a separate venue is required this can be arranged and charged separately.

### Expenses

Expenses will be charged at cost and will typically include travel, hotel and subsistence where appropriate.

### Terms and Conditions

Please find attached Roelto terms and conditions of sale.

### Workshop Confirmation

If you would like to confirm your workshop, please complete the following table below and either email or FAX back. Thank you.

<b>Date of Workshop:</b>	
<b>Number of Workshop Participants</b>	
<b>Your Details</b>	Name: Email: Contact Number: Address:
<b>Workshop Location</b>	
<b>Internet available (Yes or No)</b>	
<b>Purchase Number</b>	
<b>Approval Signature</b>	

### Contact Details:

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## Commercial Terms (Version 001)

This Proposal has been prepared on the basis of and is subject to the Commercial Terms below:

### Commercial in Confidence

This proposal has been issued in confidence and remains the intellectual property of Roelto. Nothing contained within this proposal either grants or purports to grant a licence to any party entitling them to reproduce, copy, extract, or communicate in any form whatsoever, the content, ideas, formats, proposals, calculations or the like, to any third party.

### Validity

This proposal is valid until 31<sup>st</sup> December 2013, then, once accepted, will remain valid subject to completion (3 months after).

### Purchase Order & Terms Acceptance

These terms are deemed to override any contrary terms and conditions contained in the Client Purchase Order except where specifically negotiated and agreed in writing by an authorised Roelto Ltd signatory prior to the signing of the agreement.

The work will only be commenced after receipt and written acceptance by Roelto of a valid Purchase Order or authorised written instruction from the client received by email, post or fax, confirming acceptance by the client of these terms. Any agreed amendments to these terms must be specifically referred to on the Client Purchase Order.

### Taxes Excluded

The fees exclude VAT, other taxes and statutory duties, which may apply.

### Treatment of Expenses

The fees exclude all expenses (e.g.: for travel, accommodation, meals, courier charges and any other relevant costs and per diem allowances) associated with the project. All such expenses will be invoiced to the Client at the cost incurred by Roelto.

### Invoicing Pattern

The fees will be invoiced in the following way:  
10% on placement of Purchase Order  
90% after workshop has been completed

The expenses will be invoiced monthly as actually incurred

### Payment Period & Details

Payment will be due within 14 days of the date of the Roelto invoice by direct interbank transfer to Roelto's bank account, the details of which are as follows:

Barclays Bank PLC  
Ealing Broadway Branch  
Ealing  
LONDON  
W5

Payment is in Pounds Sterling: Sort Code: 20 – 27 – 48  
Account name: Roelto Ltd  
Account number: 03042073

Roelto will charge interest on all amounts overdue at the rate stated upon the invoice. Without prejudices to such right to charge Interest Roelto, may suspend or terminate the Services by issuing formal notice to the Client advising of breach. Roelto shall not be obliged to recommence the works and or services until sums due are received.

### Liability Limitation

Roelto's liability is strictly limited to the value of the fees paid. In no circumstances shall Roelto accept liability whether based upon contract strict liability, tort (including negligence) or otherwise, for any damages for economic loss including loss of profits direct or indirect or for any, indirect, incidental, consequential or special damage of any nature whatsoever, including loss of use, loss of revenue, lost profit and loss of business opportunity or liquidated or unliquidated losses.

### Jurisdiction

This Proposal, and any subsequent agreement, which may arise, will be construed in accordance with and be governed by the law of England and Wales and be subject to the jurisdiction of the English Courts.

## Full Scope and Continuity of Work

This Proposal is based upon the full scope of work being carried out in one continuous uninterrupted assignment. Any fee breakdown shown is for invoice guidance purposes only and Roelto will not undertake any individual sections of the work for any unit prices, which may be indicated.

### Additional Charges

- Roelto reserves the right to make a charge for:
- Any preparation or interim work already carried out, in the event of cancellation by the client after placing the order.
  - Works and materials not described in the Proposal.
  - Abortive visits to and unproductive waiting time on site for Roelto personnel where created by circumstances beyond our control.

### Translation Exclusion

All work will be undertaken in the English language. Any translation of documents, or interpretation during meetings, which may be required, will be specifically agreed in writing beforehand with the Client and be a reimbursable expense in accordance with the Treatment of Expenses clause above.

### Copy Limit

1 hard copy of any deliverable document produced by Roelto for this project will be issued to the Client as standard. Any additional hard copies requested by the Client will be subject to an additional cost to be mutually agreed and this will be a reimbursable expense in accordance with the Treatment of Expenses clause above.

### Personnel

It is agreed that the Client will not approach Roelto personnel or make an offer of employment or recommend to any other party within 2 (two) years of this agreement finishing. Should this clause be breached, the Client agrees to pay Roelto 1 (one) year's recoverable fee.

### Copyright

All deliverable documents produced by Roelto during this project will remain the sole property of Roelto until paid for by the Client in full. Copyright will remain vested in Roelto.

### Health and Safety

The Client must take all precautions, which as a minimum must be in line with current legislation, to secure the health, safety and welfare of all personnel (including contractors) whilst on the Client's site. Roelto reserves the right to withdraw personnel from the Client's site should the health, safety and welfare of any personnel on site not be met

### Assignment and Third Party Rights Exclusion

This proposal and any subsequent agreement which may arise cannot be assigned nor transferred to any other party and nothing within this proposal and any subsequent agreement which may arise will confer or purport to confer on any third party any benefit or the right to enforce any term contained therein.

### SharpCloud

Roelto is Business Partner, Expert Associate and Authorised Reseller of SharpCloud. All WaaS and SharpCloud subscriptions are subject to the sharpcloud terms and conditions <http://www.sharpcloud.com/terms.html>

### WaaS – Workshop as a Service

Subscriptions are annual. If workshop facilitation is subscribed on a monthly subscription, the number of facilitation and hours will be on pro rata basis. If additional hours are required these can be purchased separately. A monthly account of hours used and remaining will be provided. Unused hours at the end of a subscription period will not be rolled over. This does not include one off workshops which will be paid as per the specific workshop proposal.