Education Program Handbook

• The Certified Professional Purchaser (C.P.P.) Accreditation Program
• Certificate in Purchasing
• PMAC’s Principles Courses
• Customized On-Site Training Programs
• Credit Seminars
# TABLE OF CONTENTS

Leaders in World Class Supply Management ............................................. 1
The C.P.P. Accreditation Program – the Way to Make a Difference ............... 2
  Why Pursue the C.P.P. Designation ..................................................... 2
  About the C.P.P. Accreditation Program ............................................. 2
  C.P.P. Program Entrance Requirements/Registration ............................... 3
Certificate in Purchasing ............................................................................. 4
C.P.P. Accreditation Program Components .............................................. 4
  Principles Courses ................................................................................. 4
  Management Courses ........................................................................... 4
  Credit Seminars .................................................................................... 5
  Advanced Purchasing Management Course .......................................... 5
  C.P.P. National Written Examination ................................................... 5
  Advanced Standing/Transfer Credits .................................................... 6
Work Experience Requirement .................................................................. 6
Program Levels .......................................................................................... 6
Program Duration ....................................................................................... 7
Detailed Principles Course Descriptions .................................................. 7
  Principles of Buying ............................................................................... 7
  Principles of Inventory and Operations Control .................................... 7
  Principles of Transportation & Logistics .............................................. 7
  Principles of Quality ............................................................................. 7
Principles Course Registration ................................................................. 8
Customized On-Site Training Programs .................................................... 9
Credit Seminar Listings ............................................................................. 10
Credit Seminar Descriptions ................................................................... 10
PMAC Directory – Institutes and Credit Seminar Registration Contacts .......... 27
The Purchasing Management Association of Canada (PMAC) is the nation’s leader in providing high calibre education and training programs in purchasing, logistics and supply chain management.

Whether you’re a purchasing and supply management professional, work in another discipline or are on a project team that requires purchasing and supply chain related knowledge such as negotiation, building supplier relationships or legal aspects of contracts, PMAC’s training and education programs can provide you with tools and knowledge that you can apply immediately.

Each year, more than 10,000 purchasing professionals, executives, managers, supervisors and trainees from both the private and public sectors learn the most up-to-date skills and techniques through PMAC’s training programs.

New seminars and courses are continuously in development and existing courses are reviewed to ensure PMAC’s training programs keep abreast of world-wide leading-edge technologies and practices in purchasing and supply chain management.

A wide range of education and training programs are open to both members and non-members. Some of PMAC’s educational offerings are:

• **The Certified Professional Purchaser (C.P.P.) Accreditation Program** – The most advanced program of its kind in North America and the world for the supply management profession. This program leads to the C.P.P. designation, the most widely recognized and respected credential in the supply management field. Holders of PMAC’s C.P.P. designation are granted recognition by CIPS (the Chartered Institute of Purchasing and Supply) in the UK, one of the largest procurement organizations in the world.

• **The PMAC Certificate in Purchasing** – The Certificate in Purchasing Program develops technical proficiency through a comprehensive series of courses and seminars designed to give you an edge in your career. The program equips you with the skills to excel in various situations. The International Federation of Purchasing and Materials Management (IFPMM) has accredited PMAC’s Certificate in Purchasing as complying fully with the requirements of the IFPMM’s Certificate of Competence in Purchasing. This means that your PMAC Certificate is recognized in more that 40 IFPMM member countries.

• **Credit Seminars** – PMAC seminars are open to anyone and provide credit towards the C.P.P. Accreditation Program and the PMAC Certificate in Purchasing. These seminars deliver specialized information on timely and topical purchasing trends and techniques useful for practitioners in the purchasing field as well as those in business professions.

• **Professional Learning and Development Program** – A number of workshops and symposia are available, designed either for those who have obtained their C.P.P. designation but who still wish to put their career on the fast track by learning emerging tools and practices in supply chain management, or for those who wish to acquire hands-on knowledge and skills to apply to their daily work or supply chain project team.

• **On-site and Customized Training** – Professional supply management training tailored to your organization’s needs at a time and place of your choosing. This program is the best value in terms of cost and flexibility.

• **Principles Courses** – The four Principles Courses provide the fundamental foundation to any purchasing, logistics or supply management career. Principles Courses are available as in-class, correspondence and/or online courses.

• **Internet Learning** – In 1998, PMAC offered its first online learning credit seminar “Ethics in Purchasing and Supply Management”. In 2000, PMAC introduced the Principles of Transportation and Logistics course in an Internet-based version. For more about PMAC seminars and courses available through the Internet, visit PMAC’s website www.pmac.ca.

In addition to our education, training and development programs, PMAC offers professional membership, providing a wide range of services to our 7,600 members with a profile ranging from industry leaders to small and medium-sized enterprises. Members also receive discounts on PMAC’s educational programs in addition to comprehensive membership services including research, magazines, career opportunities and networking, as well as discounts on products and services. Visit www.pmac.ca for more information.
Enhance your career opportunities with one of the world's most prestigious credentials in the purchasing and supply chain management profession - the Certified Professional Purchaser (C.P.P.) designation.

The C.P.P. Accreditation Program is a comprehensive national program of professional studies, with a strong academic underpinning, that has become an educational standard for the profession. And, the C.P.P. is the only legally recognized Canadian designation in the purchasing and supply management profession. With purchasing, logistics and supply management playing an increasingly important role within organizations and the rising awareness of the purchasing function’s potential contribution to the bottom line, more and more employers are seeking qualified C.P.P. holders to do this critical job.

Holders of PMAC's C.P.P. designation are granted recognition by CIPS (the Chartered Institute of Purchasing and Supply) in the UK, one of the largest procurement organizations in the world. This agreement means that C.P.P. holders from Canada can obtain the CIPS designation in the UK as well. Similar agreements with other associations are under discussion.

- **A competitive edge.** More and more employers and recruiters are looking for candidates who hold the C.P.P. designation or C.P.P. candidates who are enrolled in and have completed specific levels within the program.

- **Credibility.** Earning the C.P.P. designation tells employers that you are a skilled, accredited practitioner who is committed to the profession and keeps abreast - through ongoing and mandatory continuing education - of the most current supply management trends and opportunities.

- **Higher income.** According to a compensation survey conducted in spring 2001 by an independent consulting company on behalf of PMAC, the average base salary of practitioners with a C.P.P. designation is $67,200 - 25% higher than for those without this coveted designation. Across all accountability levels without exception (i.e., ranging from junior and intermediate positions to those at the senior executive level), those with a C.P.P. designation consistently have higher average base salaries.

- **Value.** In the competitive world in which we work, we are constantly challenged to provide greater value to the organization that employs our services, and employers are putting a high premium/value on the knowledge and expertise that a C.P.P. brings to the organization in the increasingly strategic procurement role.

The C.P.P is a life-time investment. To invest in the C.P.P is to invest in a better and more prominent career in purchasing and supply chain management.

**ABOUT THE C.P.P. ACCREDITATION PROGRAM**

**PROGRAM PHILOSOPHY / GUIDING PRINCIPLES**

PMAC intends that the program content and design must strive to achieve the highest quality educational standards appropriate to the needs of the participant. The program content is to be based on input from both practitioners and the purchasing and supply chain management academic community. Courses and seminars are developed and presented from a national point of view and at a consistent level of quality although instructors may emphasize regional or organizational interests of the participant group. However, the degree of coverage of content is essentially the same.

The program includes a common core curriculum that covers essential theory and information on its practical application. This is embodied in the four Principles Courses and the Advanced Purchasing Management Course. The content of these courses has the widest possible application on a national basis. PMAC recognizes that individuals need to acquire additional information unique to their organization. Therefore, the program recognizes this uniqueness by allowing a degree of flexibility. Seminar offerings are intended to accommodate these differing needs.
In order to motivate participants and to provide employers and others in the profession with evidence of achievement, a written system of acknowledgement whereby participants receive recognition or “credit” for various program elements and components is maintained. Relevant work experience, where acquired knowledge is applied on-the-job, is stressed in order to signify a degree of competence in addition to academic achievement.

A program design cycle intended to respond to changes in business, social and economic conditions without disadvantaging participants is maintained. Feedback is also solicited, ensuring continued revision and development to meet the needs of the profession. A review of the structure and content of the program takes place on a regular basis.

Every attempt is made to ensure the program is generally accessible across Canada without obstacles in the form of location, time, cost, language and format. Other educational institutions, when appropriate, are utilized to provide courses and also feedback on instruction and content. However PMAC controls, either directly or indirectly, both the structure and content of material found in all PMAC courses and seminars.

C.P.P. PROGRAM ENTRANCE REQUIREMENTS / PROGRAM REGISTRATION

ENTRY REQUIREMENTS
Although there are no formal academic or experiential requirements for enrolling in the C.P.P. Accreditation Program, candidates who hold a degree or diploma may qualify for advanced standing in the program.

Many accredited post-secondary institutions (universities and colleges) offer courses that satisfy the Management Studies course requirements as part of regular full-time programs of study or through their continuing education departments.

As well, some institutions offer courses that are similar to the Principles courses in content. In such cases, individuals may be allowed to write a Challenge Exam. Participants in the C.P.P. program may receive significant credit for their previous studies.

Individuals may be assessed for advanced standing based on their prior education provided they submit their official/original records to PMAC’s National Registrar. A fee is payable for such an assessment. *Please note: Principles of Buying is mandatory for all participants.*

More information about advanced standing is available in the C.P.P. Accreditation Program Handbook available from the PMAC National Office or online at www.pmac.ca.

Inquiries concerning challenge exams should be directed to the National Registrar at 416 977-9123 or toll free 1 888 799-0877 x3123.

REGISTRATION
Program registration is open to any individual wishing to formally become involved in the program. Non-members must pay a one-time enrollment fee.

Registration in the program ensures that a personal file is maintained by PMAC’s National Registrar and ensures that the individual receives ongoing program information and updates. Individuals with previous accredited post-secondary education may complete an assessment form to receive the appropriate credit toward program requirements. A fee is payable for such an assessment.
PMAC awards the Certificate in Purchasing to those who have completed a prescribed body of knowledge that prepares them to make a significant contribution to their organization. This training prepares the individual to use their initiative and discretion, to operate with specific autonomy and to improvise within a preset standard. As team members, these individuals implement programs and projects with preset latitudes for specific decisions. It is intended they be able to achieve defined outcomes; exercise judgments within defined parameters and propose for approval exceptions to or departures from general policy and procedures.

Currently, to receive the Certificate in Purchasing, an individual must successfully complete Principles of Buying, two of the remaining three Principles Courses and four seminar credits.

PMAC’s Certificate in Purchasing has been accredited by the International Federation of Purchasing and Materials Management (IFPMM), the leading international purchasing body consisting of 42 member associations, as complying with the full requirements of the Federation’s Certificate of Competence in Purchasing.

C.P.P. ACCREDITATION PROGRAM COMPONENTS

Principles Courses
PMAC has four Principles Courses:

- Principles of Buying
- Principles of Transportation and Logistics
- Principles of Inventory and Operations Control, and
- Principles of Quality

The courses are offered through a number of post-secondary institutions across Canada and through several of PMAC’s Provincial Institutes. The courses are normally offered to part-time students on a one-evening per week basis during the fall and winter semesters and occasionally on a two-evening per week basis during the spring semester. Some Institutes offer the courses on an intensive basis - often over several weekends. Institutes also offer Principles Courses through in-house company training programs arranged with employers. Fees for the courses vary slightly depending on local conditions. For information on local Principles Course offerings, contact your local college or university, your Provincial Institute or visit the PMAC website (www.pmac.ca).

Management Courses
Ten management courses have to be completed. The purpose of the Management Courses requirement is to ensure that all C.P.P. designation holders have had broad exposure to business-related concepts and practices.

Management Courses can be chosen from a number of business-related disciplines, e.g., Marketing, Economics, Accounting, Business, Finance, Policy, Business Law, Commerce, Administration, Information Technology, Computer Studies and Management Theory. Two broad categories exist - mandatory and elective.

Participants must complete five mandatory courses in each of the following areas: Accounting, Economics and Marketing and two in a Management Theory discipline (e.g., Introduction to Management, Organizational Behavior, Human Resources Management, Principles of Business Management).

Additionally, participants must complete five elective courses, which may be chosen from the business-related disciplines listed above. With the exception of the Management Theory discipline, participants may not count more than a total of two courses within each given discipline area between both the mandatory and elective components, e.g., two courses in Accounting, two courses in Marketing, etc. A total of three courses may be counted from the Management Theory discipline. Other business-related courses may be accepted, e.g. Business Communications. Participants may check with the National Registrar for eligibility of a specific course.

Courses must be credit courses chosen from a regular program offered by an accredited post-secondary institution in Canada. Upon completion of a Management Course, it is the program participant’s responsibility to provide proof of completion to PMAC’s National Registrar. The National Registrar will verify the course result and update the participant’s C.P.P. program standing. Participants are expected to achieve a passing grade as defined by the institution offering the course. Please note that only original grade reports or transcripts will be accepted to update records.
Credit Seminars
Credit Seminars are normally one or two-day events held in numerous communities across the country. Seminars are sponsored by Provincial Institutes and/or local Districts of PMAC. Seminars focus on a variety of broad topic areas including:

- Cost & Value Analysis
- Purchasing Techniques and Practices
- E-Commerce/Technology in Purchasing
- Supplier Relations & Management
- Purchasing Law/Contractual Issues
- Evaluating Purchasing Performance
- Negotiations & Communication
- Leadership in Purchasing

Sessions are meant to be interactive allowing for group discussion, independent exercises, short lectures and case studies. Presenters are selected on the basis of specialized knowledge/expertise and excellent platform skills. Information on current seminar offerings is available through the PMAC National or Institute websites or by contacting the Provincial Institute.

Advanced Purchasing Management Course
The Advanced Purchasing Management Course (APMC) is founded on one question: “How can purchasing and supply management contribute effectively to organizational goals and strategies?” The only course of its kind in the world, and the longest running course on strategic supply management anywhere, the APMC has been attended by over 6,000 managers since its inception.

Each class in this intensive six-day program pursues supply’s potential contribution to competitive advantage and customer satisfaction, as well as associated management implications.

The prominent reputation the APMC has gained over the past 34 years is indicative of the high calibre of its faculty members, who are selected for both their teaching ability and their reputation in the field of procurement and supply management.

This course also covers key issues that the manager of the supply function is likely to encounter in his or her desire to create an effective supply organization and supplier network. These include supply vision, supply strategies, e-procurement, benchmarking, supply chain management and meaningful involvement in organizational activities and strategies.

Who can attend?
The Advanced Purchasing Management Course is designed for three distinct audiences.

- Individuals registered in PMAC’s C.P.P. Accreditation program who have completed all academic and experiential program requirements, and for whom the course is the final step prior to the C.P.P. National Written Exam.
- Supply professionals not registered in the Accreditation Program may be considered. To be accepted, the applicant should have sufficient management experience to contribute effectively.
- Others who may find themselves in a position where they have recently acquired responsibility for the supply function or will have supply managers reporting to them.

For more information, contact one of our Customer Service Representatives at PMAC National Office at (416) 977-7111.

C.P.P. National Written Examination
One of the obligations of an accredited professional association is to make certain that members possess the required training, skills and qualifications of the profession. In conformity with that obligation, PMAC has developed an educational program of the highest quality that matches current and future market requirements while fulfilling practitioners’ and members’ needs and expectations. The C.P.P. National Written Exam exists therefore to meet a required obligation and represents the attainment of a rigorous national standard.

The National Written Examination is normally held at the end of September each year at locations across Canada. Only those who have completed all program requirements (Level IV) and are members of the Association are eligible to write the examination.

The Principles Courses constitute a major component of the C.P.P. Program. For that reason, day one of the exam measures the knowledge related to the four core courses (Principles of Buying, Principles of Inventory and Operations Control, Principles of Transportation and Logistics and Principles of Quality). The measuring instrument consists of a series of questions (true-false, multiple choice and short answer) divided among the four core Principles areas.

The second part of the exam, the case analysis, is designed to measure the managerial vision, skills and competencies of a potential supply manager. A case is specifically developed for the exam and used for the first time in the exam. An academic consultant ensures that the business situation and issues are clear, relevant and unambiguous.
To pass the exam, candidates must pass both days of the exam with a minimum mark of 50% each day and must achieve a total mark of 60%.

Example: Day 1 mark: 53% + Day 2 mark: 67% = Final mark of 60% = pass (both days achieved a score above 50% and averaged 60% - pass)

Example: Day 1 mark: 82% + Day 2 mark: 38% = Final mark of 60% = no pass (the mark for the second day is less than 50% - no pass)

ADVANCED STANDING/TRANSFER CREDITS

Many accredited post-secondary institutions (universities and colleges) offer courses that satisfy the Management Studies course requirements as part of regular full-time programs of study or through their continuing education departments.

As well, some institutions offer courses that are similar to the Principles courses in content. In such cases, individuals may be allowed to write a Challenge Exam. Participants in the C.P.P. program may receive significant credit for their previous studies. Individuals may be assessed for advanced standing based on their prior education provided they submit their official/original records to PMAC’s National Registrar. A fee is payable for such an assessment. Please note: Principles of Buying is mandatory for all participants.

To discuss advanced standing and/or challenge exams, please contact the National Registrar at 416-977-9123 or toll-free at 888-799-0877 x3123.

WORK EXPERIENCE REQUIREMENT

Purchasing and supply management includes such functional activities as quality specification and inspection, quantity and delivery considerations, supplier selection, outsourcing, supplier relations, supply-chain management, price determination, acquisition of services and investment recovery. Letters from employers and job descriptions are used to verify duration and appropriateness of work experience.

Minimum work experience requirements are:

- 3 years with a university degree
- 4 years with a college diploma
- 6 years with no post-secondary credential

PROGRAM LEVELS

Historically, program levels were established to reflect various stages of accomplishment as C.P.P. registered candidates progressed through the program. Many organizations in Canada recognize these levels formally and frequently cite them in their recruitment advertising and internal position descriptions. The current levels within the C.P.P. program are:

**Level I**
- Registration in the Accreditation Program
- Principles of Buying
- Two PMAC seminar credits

**Level II**
- All four Principles courses
- Four PMAC seminar credits
- One core/mandatory Management Course

**Level III**
- All four Principles courses
- Seven PMAC seminar credits
- Five core/mandatory Management Courses
- One elective Management Course
- Two years of purchasing and supply management experience

**Level IV**
- All four Principles courses
- Twelve PMAC seminar credits
- Five core/mandatory Management Courses
- Five elective Management Courses
- Three to six additional years of purchasing and supply management experience
- Advanced Purchasing Management Course
**PROGRAM DURATION**
The program has been designed with the part-time learner in mind. A participant has ten years from the date of registration to complete all requirements. Depending on the background of the participant and previous academic studies it may be possible to complete the program within two to three years. However, participants needing to complete all ten of the management studies requirements and the four principles courses should plan to take a longer period of time. If a person were to take one course in the fall semester and one course in the winter semester it would take seven years to complete the 14 courses required.

Seminars can be completed concurrently. The Advanced Purchasing Management Course normally offered in June of each year is the last component of the program prior to the C.P.P. National Written Examination. The C.P.P. National Written Examination is normally held at the end of September each year.

**DETAILED PRINCIPLES COURSE DESCRIPTIONS**
PMAC’s Principles Courses have been designed and developed in consultation with leading academics, practitioners and researchers to provide participants with a comprehensive introduction to purchasing and supply chain management, inventory & operations control, transportation & logistics, and quality management. They include current theory, information and practices, which can be applied to a variety of settings. Classroom versions are participatory in nature, using case studies; small and large group discussions and short lectures. Participant performance in the courses is evaluated based on participation, a mid-term examination and a final examination.

**PRINCIPLES OF BUYING**
Many organizations are recognizing the strategic importance of purchasing and supply management and its impact on their overall competitiveness. The Principles of Buying course provides supply management practitioners, or those considering a career in the field, with a comprehensive introduction to purchasing and supply management techniques and practices.

**Course topics include:**
- Supply Scope; Organization; Procedures; Computerization; Quality; Specification and Inspection; Quantity Considerations; Supplier Selection; Ethics, and Make or Buy (Outsource); Supplier Relations and Supply Chain Management; Price and Price Determination; Investment Recovery; and Public Purchasing.

**NOTE:** Individuals are encouraged to take the Principles of Buying course first, where possible.

It is advisable for a participant with little or no knowledge of, or training in, mathematics to complete a college/university level course in Introductory Math before registering for the following Principles courses.

**PRINCIPLES OF INVENTORY AND OPERATIONS CONTROL**
This course provides an introduction to concepts and issues in operations management and is designed to give a firm grounding in the basics of managing materials. To support purchasing and supply management’s role in identifying reliable and cost-competitive sources of goods and services, building relationships with supply-chain partners, and ensuring timely delivery, it is important to understand basic operations concepts and terminology.

**Course topics include:**
- Production Processes and Analysis; Inventory Functions; Forecasting; Aggregate and Production Planning; Material Requirements Planning (MRP); Short Term Scheduling and World Class Manufacturing Techniques; Project Management.

It is strongly recommended that students complete the Principles of Buying course before taking this course.

Mathematical aptitude would be an asset.

**PRINCIPLES OF TRANSPORTATION & LOGISTICS**
Logistics and transportation services represent a critical aspect of the supply chain for manufacturing, services and nonprofit organizations. Decisions involving logistics and transportation can affect customer service performance, financial investments in inventories, warehousing facilities, and transportation equipment, the amount, value and types of inventories kept in stock, and methods of communication between supply chain partners along with the associated investments in technology. Consequently, the logistics and transportation component of most organizations impacts its competitive posture in the marketplace. The Principles of Transportation and Logistics course provides practitioners with a comprehensive introduction to transportation and logistics practices.

**Course topics include:**
- The role of the logistics function in the economy, transportation management, customer service and performance measurement, order processing and information systems, logistics financial impact, inventory management, managing materials flows, JIT systems, warehousing and stores, international logistics and measuring and selling the value of logistics.

**PRINCIPLES OF QUALITY**
This course provides an introduction to basic concepts and issues in quality management. The purchasing and supply management function plays an important role in quality activities. Purchased goods represent, on average, about 50-60% of company sales, and the quality of finished products and services depends on the quality of the inputs. Consequently, there is a need to understand basic quality terminology and concepts.

**Course topics include:**
- The Management Revolution; Total Quality; Definition and Basic Concepts; Implementing Total Quality: A step-by-step Process; Continuous Improvement and Reengineering; Total Quality Management Practices; Total Quality in Services; The Human Aspect of Total Quality; Planning for Total Quality; Organizing for Total Quality; Total Quality Assessment and Control; Total Quality Assurance; Total Quality and ISO 9000.

Although not a requirement, PMAC encourages students to be familiar with basic statistics concepts before taking this course.
PRINCIPLES COURSE REGISTRATION

IN-CLASS PRINCIPLES COURSES

PMAC’s Principles Courses are offered at over 30 universities and colleges across Canada. For a complete list of institutions, visit www.pmac.ca. You may register directly with the offering institutions or contact your provincial Institute (please see the last page of this handbook for contact information).

CORRESPONDENCE PRINCIPLES COURSES

Principles Courses are also available in a print-based, self-study, correspondence course format from your Provincial Institute. The correspondence courses allow you to progress through the program at your own pace and at a time and place convenient for you.

ONLINE PRINCIPLES COURSE: PRINCIPLES OF TRANSPORTATION & LOGISTICS

PMAC’s Principles of Transportation & Logistics Course is available online. Participants from anywhere in Canada or worldwide with Internet access are welcome.

The Internet course has the same volume of content coverage as the classroom version. The online version includes:
• Audio lectures to supplement each section of the course material
• Discussion groups for participants to pose questions and view responses of others
• On-line quizzes at the end of each section to test understanding of the material covered

About the POTL online course:
This course is designed for those who work in the fields of transportation, logistics, purchasing, and/or materials management, or who are contemplating employment in one of these areas. It is designed to:
1. Provide an understanding in basic terminology of transportation and logistics
2. Help participants be able to define and analyze problems in the areas of transportation and logistics, and develop, communicate and implement a plan of action
3. Provide an understanding of the need for policies and procedures related to transportation and logistics
4. Provide an understanding of how transportation and logistics can contribute to the competitive position of the firm
5. Provide a foundation for advanced study in the field

How to register for the online course:
Visit PMAC’s website at www.pmac.ca for registration information.

The fee for the course covers the Course Notes for Participants, the required textbook and 15 weeks of access to the course website.
Looking for the most cost-effective way to provide your employees with latest purchasing, logistics and supply management know-how? PMAC is Canada’s leading source of high-quality, on-site training programs for the supply management profession.

Ask PMAC to develop a course outline that’s exactly right for your organization.

PMAC is Canada’s leading source of top quality educational programs in purchasing and supply management. PMAC brings over 30 years of training and education experience to a wide selection of courses - from introductory purchasing fundamentals to more advanced subjects on negotiation skills and strategies, outsourcing, international trade issues and e-commerce.

For large and small companies, organizations and public institutions, PMAC’s on-site training is always the right choice because the content can be tailored to meet your organization’s particular objectives.

And if you don’t see the program that’s exactly right for your employees, PMAC’s education specialists will develop a new program for you - quickly and cost-effectively.

You decide when and where the learning will take place, eliminating costly travel expenses and minimizing lost time from the workplace. Our instructors will conduct seminars at the location of your choice and at a time that makes the most sense for your employees and your organization.

Knowledgeable instructors are the foundation of any effective learning program. At PMAC, we have access to some of the world’s best. Each instructor is a recognized expert, carefully selected based on teaching ability and reputation in a specific subject area. Many instructors are Canadian - people who have been recognized for their knowledge and commitment to their chosen field. Whenever appropriate, PMAC recruits experts from the United States and abroad to ensure our clients benefit from the very best instruction possible.

With on-site programs attended exclusively by your employees, confidentiality is always assured. Sensitive subjects can be raised and discussed openly without any concern of disclosing competitive information. This open forum also offers the opportunity and time to explore ways in which new ideas and strategies can be applied to your organization directly.

Many on-site courses may be credited toward the Certified Professional Purchaser (C.P.P.) accreditation program. If any of your employees are working towards their C.P.P. designation, please call and ask for details.

For more information regarding on-site credit seminars, please contact your Provincial Institute office or a Customer Service Representative at the National Office.
PMAC offers numerous one and two-day credit seminars. These highly interactive seminars combine group discussions, independent exercises, short lectures and case studies. PMAC’s Provincial Institutes deliver these seminars across Canada and they are also available in-house for those organizations that prefer to host their education programs on-site.

The following seminars provide credit towards either the C.P.P. designation or act as maintenance points towards the C.P.P. designation. They also provide credit towards the PMAC Certificate in Purchasing. Anyone interested in these seminars may attend.

Registration: To register for credit seminars, contact your Provincial Institute listed at the end of this handbook.

Below is a complete list of English and French credit seminars. Complete English descriptions follow. To see the most up-to-date list and/or to see the French language descriptions, please visit the PMAC National website (www.pmac.ca) or contact your Institute to request a French Handbook.

### COST & VALUE ANALYSIS
- How to Measure Profits & Costs Across the Supply Chain
- Value Analysis

### E-COMMERCE / TECHNOLOGY IN PURCHASING
- E-Procurement Today
- Information Technology in Purchasing and Supply Management - An Overview

### PURCHASING LAW / CONTRACTUAL ISSUES
- Droit de la construction au Québec
- Droit relatif à l’approvisionnement - biens et services
- Fundamentals of Contract Law: Negotiating and Drafting Major Business Agreements
- Laws of Contracts and Agency
- Laws of Requesting Tenders, Proposals and Quotations
- Legal Aspects of Purchasing - Goods & Services (Quebec only)
- Legal Aspects of Purchasing - Tenders & Bids (Quebec only)
- Processus d’appels d’offres

### NEGOTIATIONS & COMMUNICATIONS
- Better Ways to Better Deals
- Effective Communications
- Negotiation Planning
- Planification de la négociation
- Psychological Strategies in Negotiation
- Psychologie de la Négociation

### PROJECT MANAGEMENT
- Introduction to Project Management for the Supply Management Professional

### LEADERSHIP IN PURCHASING
- Comportement organisationnel
- Ethical Issues in Purchasing and Supply Management
- Gestion stratégique
- Problèmes éthiques en approvisionnement
- Professionalism in Purchasing
- Professionnalisme en approvisionnement
- Strategic Management

### PURCHASING TECHNIQUES & PRACTICES
- Chaîne d’approvisionnement et de logistique
- Customs and International Trade
- Gestion de projet en approvisionnement
- Gestion et développement du réseau de la fonction approvisionnement
- Gestion et développement du réseau de la fonction approvisionnement
- Improving Service Acquisition
- Integrating Purchasing, Transportation and Inventory to increase Supply Chain Effectiveness
- Juste-à-temps : vers de nouveaux défis
- L‘impartition : défis stratégiques et organisationnels
- Materials Management
- Mieux comprendre l’acquisition de service
- Strategic Outsourcing
- Planification des besoins-matières
- Prendre le virage écologique : pour de meilleurs résultats grâce à des pratiques d’approvisionnement environnementales
- Recherche en approvisionnement
- Strategic Sourcing

### SUPPLIER RELATIONS & MANAGEMENT
- Implementing Highly Cooperative Customer Supplier-Relationships (Formerly Implementing Customer Supplier Alliances)
- Le marketing à rebours comme stratégie de gestion des fournisseurs
- Partenariat et alliances stratégiques avec les fournisseurs
- Qualification des fournisseurs : concept et processus
- Strategic Supply: Maximizing Supply’s Contribution to Organizational Goals & Strategies
- Vendor Certification

### EVALUATING PURCHASING PERFORMANCE
- Applied Benchmarking in Purchasing
- Comment optimiser la performance de ses fournisseurs
- Evaluating Supply Effectiveness
- Évaluation de la performance en approvisionnement
- L‘analyse comparative appliquée à l’approvisionnement
**COURSE CONTENT**

Supply chain professionals who have buyer-seller trading partnerships and want to measure the profit margins and costs. This seminar aims to describe how each trading partner can gain better insight into the true and relevant costs for their products, SKUs, service lines, freight, channels, and customers for better profit contribution reporting and analysis.

**YOU WILL LEARN**

- How to measure supply chain profits and costs and gain increased confidence in using a useful managerial accounting system.
- How purchasing’s Total Cost of Ownership and marketing’s Direct Product Profitability can be combined.
- How to measure inter-firm costs where trading partners cause costs for others.

**WHO SHOULD ATTEND**

Supply chain professionals who have buyer-seller trading partnerships and want to measure the profit margins and costs. This seminar aims to describe how each trading partner can gain better insight into the true and relevant costs for their products, SKUs, service lines, freight, channels, and customers for better profit contribution reporting and analysis.

**COURSE CONTENT**

- The current problem (organizations’ traditional costing is structurally deficient to report accurate costs)
- Its cause (the general ledger is not structured to report variable costs, and traditional cost allocations are arbitrary with little cause-and-effect)
- New needs (ability to dynamically quote profitable prices and identify cost savings)
- The solutions (using advanced costing techniques like constraint-based costing and activity based costing)
- Successes applying the solution

**YOU WILL LEARN**

- How to measure supply chain profits and costs and gain increased confidence in using a useful managerial accounting system.
- How purchasing’s Total Cost of Ownership and marketing’s Direct Product Profitability can be combined.
- How to measure inter-firm costs where trading partners cause costs for others.

**WHO SHOULD ATTEND**

Purchasing, engineering and sales professionals, as well as buyers and managers involved in costing processes.

**YOU WILL LEARN**

- How to define and analyze value
  - A systematic method for analyzing the value of products, processes and services
  - Step-by-step “how to value” techniques

**COURSE CONTENT**

This two-day seminar will focus on the various techniques of value analysis. The seminar aims to define and analyze value, to understand value analysis - why and how it works, and to apply step-by-step systematic “how to use value” techniques through project work.

This seminar uses a workshop format involving teams to analyze actual products, processes and services of the participants, using a systematic process. Project worksheets examine:

- Identifying existing products, processes and services
- Determining primary and secondary functions

- Creative brainstorming to develop ideas for alternative or improved products and services
- Evaluation and development of the improved product and function
- Fine-tuning the idea: determining the function of the service or product; considering whether it should be made in-house or outsourced; examining alternative designs and considering potential design changes
- Investigation and consultation: determining how this new idea can be implemented; investigating sources; feasibility studies
- Obtaining vendor quotations on all the materials, parts and supplies needed to produce a new product or implement a new process or service
- Summarize the information, analyze the value of the new or improved product, service or process using a systematic method, and reach a recommendation
- Presentation of final recommendations: explain why an idea should be dropped or implemented; use value analysis to show what the new development will do to improve the bottom line, including factors such as whether increasing the cost of a product or process will impact market share.
E-COMMERCE / TECHNOLOGY IN PURCHASING

E-PROCUREMENT TODAY (1 day/1 credit)  

WHO SHOULD ATTEND
This seminar will provide very detailed and cutting edge information and tools regarding the realities of electronic procurement in the work world. The main goal would be to bring the purchasing practitioner up to speed on what is available “out there”, i.e., on the Internet and elsewhere, and more importantly - how it can be applied on a day-to-day basis by the practitioner to provide greater value to the purchasing function and contribute in a tangible and highly noticeable way to the overall goals of the organization.

YOU WILL LEARN
1. Electronic auctions
   • Reverse auctions
   • Forward auctions
   • On line bid process
   • MERX bid process
2. Electronic catalogues
   • Seller controlled catalogues
   • Buyer controlled catalogues
   • Third-party controlled catalogues/catalogue aggregators/portals
   • Customized catalogues
3. “Clicks and mortar” business model
   • Virtual supply chain
   • Intranets and extranets
   • Decision support solutions
   • Types of pricing
   • Real world examples (like Ariba, Commerce One, Oracle)
   • Categories/classification of electronic markets
   • Sector/Industry exchanges-OLMs (On Line Marketplaces)
   • Commodity & function-specific vertical sites
   • Centralized trading at electronic hubs

COURSE CONTENT
• Content management and rationalization/populating, updating and maintaining vast, electronic data bases
• Crucial importance of data accuracy, integrity and security
• Internet and MRO purchasing - a natural fit
• Role of intermediaries (a concern - disintermediation of supply chain partners and channel conflicts; new class of intermediaries arising from e-commerce applications)
• Caveat: don’t automate inefficiency (use automation to deal with manual processes that do not add value). Avoid much faster ways of making the same old mistakes.
• Importance of systems integration to increase efficiency and lower costs (development of common technical standards and data exchange languages - XML)

INFORMATION TECHNOLOGY IN PURCHASING & SUPPLY MANAGEMENT: AN OVERVIEW (2 DAYS/2 CREDITS)

WHO SHOULD ATTEND
Purchasing and supply management professionals responsible for integrating electronic commerce into their purchasing departments. This seminar will also benefit senior managers working with automated purchasing or financial acquisition systems, individuals involved in re-engineering processes and anyone who is considering implementing electronic commerce into their organization.

YOU WILL LEARN
• Electronic purchasing systems from request through to payment and the potential of information they generate
• Applications for electronic purchasing
• Credit card, debit card and money card purchasing
• Competition - the elements driving change in procurement methods
• Re-engineering for the future: systems you need to put in place today in order to be in a position of strength five years from now
• A review of Internet, Intranet and Extranet tools
• The savings and costs related to electronic commerce

COURSE CONTENT
• Automated purchasing using the Internet, Intranet, Extranet; applications for credit card, debit card and money card purchasing
• Procurement cost structure analysis: typical transactions; sourcing; analyzing company purchase dollars
• Planning and implementation; preparing and analyzing your needs; selecting the appropriate solution; selecting the appropriate vendor; setting measurable goals; determining resources; phasing and tracking the plan; communications; legal considerations
• Business process reengineering, universal economy, pace of technological change; strategic linkage
• Electronic commerce introduction and background: objectives; required systems automation
• Base elements required by your company and the supplier
• History of electronic commerce and supporting hardware
• Today’s electronic commerce models: direct link to vendor; individual catalog sites; industry catalog directories; MRO/general catalog directories; interactive directories; RFP/RPQ services
Understanding contract law and the terms and conditions of a contract has become an essential part of conducting our daily business functions. This seminar is designed to provide you with legal strategies for integrating the law with day to day business activities.

WHO SHOULD ATTEND
Both new and experienced contracting, purchasing, and supply management professionals who desire to understand basic contract premises and law, as well as a detailed analysis of contract terms and conditions, will benefit from this seminar.

PROGRAM DESCRIPTION
This newly developed, 2-day, interactive seminar is divided into four complementary parts which provide you with an all-encompassing understanding of the contracting process. The four parts include; the Fundamentals of Contract Law, an Introduction to the Tender Process: Fundamentals of the Laws of Tenders, Power Negotiation Techniques and Strategies, and Understanding and Drafting the Terms and Conditions of the Contract.

YOU WILL LEARN

Part 1: Fundamentals of Contract Law
• An overview of laws that impact contracts; what is required prior to developing contracts, and how it is imperative to review basic contract law concepts
• Contract formation: How to construct legally binding agreements
• What the parties’ obligations are under the contract and what can be done if a party breaches the contract
• Practical examples and techniques on how to avoid contract disputes
• Taking the fear out of legal language

Part 2: Introduction to the Tender Process:
Fundamentals of the Law of Tenders
• Drafting the RFP/RFQ
• Avoiding misrepresentation during the tender process
• How to avoid claims by suppliers during the tender process

Part 3: Power Negotiation Techniques and Strategies
• The foundation of negotiation: different negotiation philosophies and styles
• Learn how to prepare effectively for negotiations and avoid typical negotiation traps
• Get practical examples that can help you negotiate good contracts and that can save your company money in the long run

Part 4: Understanding and Drafting the Terms and Conditions of the Contract
• Detailed discussion of a wide variety of standard contract clauses (terms and conditions)
• How to draft and use common contract clauses
• Interpretation of contract language; Legal wording that is and is not necessary in agreements
• Get many practical examples and techniques on how to write more effective contracts
• Learn how to draft contracts with liability prevention in mind
• Find out how to avoid legal disputes and when to seek legal advice

Program Leader:
Ms. Sandy Chalkhoun, B.A., B.C.L, L.L.B, the founder of Insite Legal Education, is dedicated to providing expert legal training to corporate professionals. The seminars are designed to provide attendees with legal strategies for integrating the law with day to day business activities. Ms. Chalkhoun completed a Bachelor of Arts from Concordia University, a Bachelor of Civil Law and a Bachelor in Common Law from McGill University, and is a member in good standing of the Quebec Bar. She served as legal counsel for several multinational corporations before starting her own corporate training company.
LAWS OF CONTRACTS AND AGENCY (2 days/2 credits)

WHO SHOULD ATTEND
Anyone involved in purchasing and Contracting for any dollar value on behalf of their organization.

YOU WILL LEARN
• The legal requirements of Contract law
• How to enforce Contracts and the remedies the law provides for breach
• What will and will not affect a binding Contract (i.e., the laws of mistake, misrepresentation and duress)
• The risks of Verbal, Facsimile and Electronic Contracts
• The requirements of the law of Agency
• The responsibilities and rights of Agents and Principals
• The effects of unauthorized Contracting
• The expanded personal liability of Agents
• The differing requirements of Goods and Services Contracts
• The laws governing buying Goods
• The risks of inadequate Services Contracts

COURSE CONTENT
• What is a legally binding Contract
• The Essential Elements of all Contracts
• Fax, Verbal and Electronic Contracts
• What is and is not Performance of the Contract
• Lawful methods of ending a Contract
• Breach of Contract and Remedies

SPECIALIZED CONTRACTS
Agency:
• The laws of agency
• Creation of agency
• Liability of agent and principal
• Acting without authority
• Ending the agency relationship

Purchase of Goods:
• The laws governing Sale of Goods
• The provincial Sale of Goods Acts
• Buyer’s rights and remedies
• Seller’s rights and remedies

Purchase of Services:
• The laws governing buying Services
• The risks of inadequate Services Contract
• Essential terms in Services Contracts

LAWS OF REQUESTING TENDERS, PROPOSALS AND QUOTATIONS (2 days/2 credits)

Prerequisite: This seminar is especially designed for those who have either taken a business law course, or have attended the PMAC seminars on Purchasing Contracts. It assumes a basic knowledge of contract law. This two-day seminar examines the basic laws of Competitive Bidding of all types - Invitations to Tender, Requests for Proposals and Requests for Quotations.

WHO SHOULD ATTEND
Anyone involved in the process of procuring goods or services using a competitive bid model, from those who issue the Invitation or Request to the end users and technical advisors to those who submit bids and proposals.

YOU WILL LEARN
• The laws governing Competitive Bidding
• The legal obligations of owners and consultants in Competitive Bidding
• The legal obligations of bidders and proposers
• Why and how Competitive Bidding became binding on all public and private organizations
• The added burden upon public purchasers from the trade agreements (NAFTA and AIT)
• How to run a successful competitive procurement from start to finish with a minimum of legal risk

COURSE CONTENT
• The binding nature of Competitive Bidding (methods of Competitive Bidding, RFPs v. Tenders, Contracts A & B, requests for information and pricing)
• The legal obligations of owners and consultants (the duties to disclose, to act fairly and to act in good faith, excluding liability)
• The legal obligations of bidders and proposers (the duties of compliant bidding, irrevocable bidding and doing the work for the price bid)
• The power of the Invitation/Request in Competitive Bidding (the Invitation governs everything, the Privilege Clause, necessary and optional choices in the Invitation/Request)
• Controlling your practices and policies (policies matter, pre-qualification and source lists, good evaluation is critical, process sabotage, supplier complaints, ethical considerations)
• Future Trends (what the future holds, staying current, managing change)
LEGAL ASPECTS OF PURCHASING - GOODS & SERVICES
(Quebec Civil Code) (2 days/2 credits) – available in Quebec only

WHO SHOULD ATTEND
Purchasing professionals seeking to gain a more in-depth understanding of basic legal concepts affecting their activities, especially laws related to tendering and contract law related to selling/purchasing under the aegis of the Civil Code of Quebec.

YOU WILL LEARN
• How the law affects purchasing decisions
• How to improve your binding contracts
• How to write more efficient clauses
• Potential liabilities of the purchasing agent
• How to react in a situation of insolvency
• When you should ask for legal advice

COURSE CONTENT
• Overview of the Law of Goods and Services
• Forming valid contracts: offer and acceptance, legal effects of using EDI, written and oral contracts, terms and conditions on purchase orders, interpretation of contract language, etc.
• Duties of the seller and the provider of services
• Warranties on goods - implied and express
• Remedies and defenses against contract enforcement
• Agency - duties and liabilities - actual and apparent authority
• Bankruptcy - effects on the buyer

LEGAL ASPECTS OF PURCHASING - TENDERS AND BIDS
(Quebec Civil Code) (2 days/2 credits) – available in Quebec only

WHO SHOULD ATTEND
Purchasing professionals seeking to gain a more in-depth understanding of basic legal concepts affecting their activities, especially laws related to tendering and contract law related to selling/purchasing under the aegis of the Civil Code of Quebec.

YOU WILL LEARN
• How the law affects purchasing decisions
• How to improve your binding contracts
• How to write more efficient clauses
• Potential liabilities of the purchasing agent
• How to react in a situation of insolvency
• When you should ask for legal advice

COURSE CONTENT
• Overview of the typical stipulations in a tender: The duty to treat all bidders fairly and equally, the duty of providing information to bidders, the effect of “lowest or any tender not necessarily accepted”
• The legal differences between an invitation to tender and a request for proposal
• Duties of the parties
• Federal Competition Act on unfair bids
• Remedies for the discarded bidders
• Remedies for the chosen bidder based on the purchaser’s liability
• Remedies for purchasers based on the law and the documentation
Negotiation is one of the core skills that buyers and sellers must be able to effectively apply. Public and private sectors, as well as not-for-profit organizations are involved in negotiations for products and services as a means of transacting business.

We can be involved in negotiations with internal departments or other managers when we try to secure resources, information or support for our ideas. Negotiation is a model for establishing relationships between parties, even where business opportunities are not imminent. It sets the stage for future possibilities. The negotiation process may intimidate individuals where less experienced negotiators are trying to bring a deal to closure with a more experienced party.

**WHO SHOULD ATTEND**

Those who want practical information they can take away and apply in everyday situations. This seminar is for individuals who want to achieve at a higher level and need more understanding of the negotiation process.

**YOU WILL LEARN**

- Practical insights to achieving your objectives through negotiations
- Understand the negotiation process
- How to achieve our goals – both business and personal.

**COURSE CONTENT**

- When should we negotiate
- What issues can be discussed
- Key elements of negotiations
- Basic rules of success
- The “where” factor
- Psychological influences
- Finding the hidden needs
- The fear of being fair
- Positional bargaining versus win-win attitudes
- Assumption traps
- The better price phenomenon
- How to leverage opportunities
- Telephone negotiation tools
- The use of concessions
- Ways to challenge price increases
- Using cost breakdowns versus price
- Practical strategies and tactics
- The done deal duties

---

**EFFECTIVE COMMUNICATIONS (1 day/1 credit)**

**WHO SHOULD ATTEND**

Those who want practical information they can take away and apply in everyday situations. This seminar is for individuals who want to achieve at a higher level and need more understanding of the communications process in a business environment.

**YOU WILL LEARN**

- The simple process of communicating
- How to avoid difficulties when communication breaks down
- How to present your message in a way that will be understood and acted upon
- Bottom line writing and clear objective determination

**COURSE CONTENT**

- Barriers to Powerful Communication
- Communication without words
- Presenting Yourself Effectively
- Communication Strategy
- Business Writing: Preparing for Results
- Writing Exercises, Evaluation, Discussion
- Choosing Powerful Communication Channels
NEGOTIATION PLANNING (2 days/2 credits)

**WHO SHOULD ATTEND**
Although geared to people whose jobs involve negotiating with suppliers or purchasers, this seminar has useful applications for virtually anyone in their interactions with colleagues and friends.

**YOU WILL LEARN**
- The framework for negotiation, including the basic steps of negotiating
- A basic understanding of the process of negotiation
- That negotiation is an efficient tool of the procurement function
- To sharpen your analytical and implementation skills

**COURSE CONTENT**
- The Negotiation Process: a preliminary feel for what is to be achieved; obtaining necessary information; examining the information for other approaches; choosing a few sensible approaches; determining when negotiation makes sense
- The Plan: assessing positions of strength of both parties; setting objectives; establishing strategy; internal selling; rehearsal and review; face to face; the verbal agreement; the contract; maintaining the relationship
- Negotiation within negotiation
- Negotiation process exercises
- Case study

PSYCHOLOGICAL STRATEGIES IN NEGOTIATION (2 days/2 credits)

**WHO SHOULD ATTEND**
This seminar complements the Negotiation Planning seminar and builds on the strategies outlined in that course. While the Negotiation planning course material is geared to individuals who negotiate with suppliers and purchasers, it has applications for virtually everyone in their daily interactions with colleagues and friends.

**YOU WILL LEARN**
- The hard dimensions of negotiating
- To recognize the variety of psychological strategies which may be used in negotiation
- To sharpen your skills in psychological strategies
- How to assess the other party’s interests and goals
- How to satisfy the other party’s needs while still meeting your own goals
- To develop situations that benefit both parties - creating a win/win situation

**COURSE CONTENT**
- Why people behave the way they do
- A case study of Western Pharmaceuticals Inc.
- Negotiation preparation questions
- Group exercise: brainstorming analysis
- Hidden assumption records requiring participants to study two actors from the case study Western Pharmaceuticals Ltd.
- Self actualization test and assessment
- Satisfying high needs in negotiation
- One-on-one negotiation exercise between participants
- Negotiation exercise with participants playing the role of specific characters from the case study Western Pharmaceuticals Inc.
- Psychological strategies in negotiation; applications to personal situations
Projects are becoming increasingly common. They are impacting everyone’s life. Understanding projects is critical to understanding the world of work around you. Without that understanding, you feel tossed around like a rudderless sailboat in a storm. With an understanding of projects, the storm is no less fierce, but you are able to influence your course and exert control over your destiny.

**WHO SHOULD ATTEND**

This interactive seminar focuses on the needs of people who are either working in Purchasing, or who have little or no project management experience but who are called upon to help with a project from time to time. The project could be one initiated in the Purchasing department, or it could be an external project where assistance from Purchasing is necessary.

**PROGRAM DESCRIPTION**

This seminar will prepare you to contribute effectively to projects. If you are working full time on projects, you probably already know most of what will be covered in this seminar.

**YOU WILL LEARN**

- Work differs from regular work
- Where projects come from
- Why we have projects
- How projects get done
- What the various roles are in projects
- How to assess the role assigned to you
- What the implications are for each of those roles
- How to perform them, focusing

**LEADERSHIP IN PURCHASING**

**ETHICAL ISSUES IN PURCHASING & SUPPLY MANAGEMENT**

(1 day/1 credit)  

**WHO SHOULD ATTEND**

This seminar is a basic course for people who work in the purchasing or supply management sector of business and will also benefit anyone interested in ethical questions affecting purchasing management.

**YOU WILL LEARN**

- An understanding of ethics applied to the work of the purchaser
- A review and reflection of actual ethical situations in the workplace
- A practical decision making procedure to reach ethical decisions
- An understanding of the powerful influences affecting the way people actually make ethical decisions

**COURSE CONTENT**

- Ethics – what is ethics? What relation does it have to the job of the supply management professional?
- What is an ethical situation? How can we understand and respond to such a situation?
- The major ethical theories; what is an ethical standard and how it can be used to make an ethical decision
- Ethical influences: what influences our ethical decision-making? How can we become aware of these influences?
- Each unit is followed by a simple progress quiz or case study
PROFESSIONALISM IN PURCHASING (2 days/2 credits)

WHO SHOULD ATTEND
Supply professionals, especially those who are members of the Purchasing Management Association of Canada, stand to benefit from this seminar which takes a philosophical look at enhancing the image, credibility and reputation of supply professionals both as individuals and as members of a profession at large.

YOU WILL LEARN
• The distinction between accredited and non-accredited associations
• The benefits and obligations of an accredited association
• To understand your own professional obligations to your public
• How to speak with knowledge and authority about the profession
• How to develop professional objectives and action plans to meet those obligations
• Selling tools for raising the image and importance of your profession to others in the organization

COURSE CONTENT
• Professional associations: provincially accredited versus non-accredited; identifying the public served by an association
• The purchasing profession: defining professionalism; measuring the reputation and credibility of supply professionals against other professions
• Your profile as a professional: being devoted to the work; becoming a source of major ideas to others in the organization; an attitude to assume new responsibilities
• Selling the profession: understanding your obligations as supply professionals
• Action plans for buying your way to the top: developing a positive attitude; enhancing your image and recognition as a professional within the organization; getting connected and involved with cross-functional groups, peers and upper management; speaking with authority; taking a leadership role

STRATEGIC MANAGEMENT (2 days/2 credits) Revised

WHO SHOULD ATTEND
Since everyone in an organization can potentially affect change, this seminar will benefit professionals from all levels of management. This two-day seminar is designed to integrate the perspectives developed in various functional areas of business. Although open to anyone with an interest in strategic management, it is recommended for individuals preparing for the Advanced Purchasing Management Course.

YOU WILL LEARN
• Strategy formulation and implementation
• The challenges of successfully managing strategic and organizational change
• An increased understanding of the importance of taking a strategic perspective of the organization

COURSE CONTENT
• The concept of strategy
• The major components in the strategic management process
• Problems and issues associated with successfully managing strategic change
• Possible sources of weak or strong organizational performance
The recent changes to the Customs legislation make it more important than ever to be cognizant of the issues when making trade decisions. Companies in the business of importing and exporting should be prepared to utilize all the new legislation to their advantage while minimizing their liabilities. The introduction of Administrative penalties and Customs Self Assessment is the beginning of the evolution of how cross border business is conducted. Informed and voluntary compliances is now paramount to any tax management strategy. To be eligible to enter the CSA program importers will have to establish adequate internal controls and documented audit procedures. Valuation issues, bilateral and multilateral trade agreements and additional requirements create increasingly complex trade regulations.

Goods that were imported into Canada can still face reassessment for a period of four years after the fact. Do not let a retroactive CCRA reassessment or an AMPS penalty make your business unprofitable. Understand all of your obligations under the new legislation.

**WHO SHOULD ATTEND**
Purchasing professionals, accountants, financial managers and anyone dealing with the international movement of goods and services.

---

**IMPROVING SERVICE ACQUISITION (2 days/2 credits)**

Why do so many buyers who are otherwise very competent in acquiring goods, feel somewhat helpless when they have to purchase certain types of services? It is due partially to their lack of understanding of the characteristics of services and their impact on acquisition. This seminar examines the impact of the characteristics of a variety of services on the acquisition process in both the public and private sectors in order to improve buyers’ competence in this growing area.

**WHO SHOULD ATTEND**
Purchasing, logistics and supply management professionals who buy services and those working in other capacities such as marketing who must outsource.

---

**YOU WILL LEARN**
- The special characteristics of services
- How to divide the service sector into manageable segments to clarify and improve decision making
- Roles for purchasers of services
- How to gain a position of relative strength with suppliers and within your organization
- How to get the quality you want in your service purchases
- Service acquisition process steps
- Making the ‘make-buy’ trade-off: how to determine whether to make it internally or buy it from an external supplier

**COURSE CONTENT**
- Understanding services
- Purchasers’ potential roles in service acquisition
- Achieving quality in services
- The service acquisition process
- Strategic dimensions to purchasing services
INTEGRATING PURCHASING, TRANSPORTATION AND INVENTORY TO INCREASE SUPPLY CHAIN EFFECTIVENESS  (2 Days/2 Credits)

WHO SHOULD ATTEND
Supply Management professionals who wish to get an overview and understanding of how computer technology is generating productivity improvements through automation and effective integration of key elements in the supply chain.

YOU WILL LEARN
• How traditional logistics management tools have evolved into modern supply chain philosophy
• How transportation pricing and its impact on the firm’s overall supply chain costs
• Supply and demand principles of transportation
• How integration of transportation, procurement, and inventory management can increase global supply chain efficiencies
• Warehousing principles and their ability to enhance the supply chain product/information flow
• How to identify computerized enhancements in the materials handling process resulting in automated data collection and improved information flow

COURSE CONTENT
• Customs requirements in Transborder trade and their impact on supply chain management strategies
• How automated B2B, E-commerce, and Web based solutions are being used to effectively automate and improve supply chain efficiencies

MATERIALS MANAGEMENT (2 days/2 credits)

WHO SHOULD ATTEND
Individuals looking for either an introduction or a review of the basics of materials management, including forecasting, order points, economic order quantity, material requirements planning and just-in-time concepts. The seminar will also benefit professional purchasers who are assuming more direct responsibilities for the timing and size of purchase or production orders.

YOU WILL LEARN
• Tools and techniques for determining forecasts, order quantities and safety stocks
• Cycle counting to improve inventory accuracy and as a substitute for the annual inventory count
• What to look for and what to expect from a material requirements planning (MRP) system
• Implications and applications of just-in-time concepts in purchasing

COURSE CONTENT
• Forecasting based on the analysis of underlying causes compared to forecasts based on past usage; defining exponential smoothing in pictures and words; coping with forecast error; choice of smoothing coefficient; types of forecast error; 'noisy' forecasts; measuring forecast variability and relating it to safety stock; biased forecasts; tracking signals; producing aggregate forecasts from detailed forecasts; capabilities to look for in forecasting software
• Inventory management systems: continuous review versus periodic review
• MRP fundamentals; independent versus dependent demand; components and benefits of MRP; using MRP to manage inventory, priorities and capacity; role of master production schedules, inventory records, planned lead times and bills of material
• An example of materials planning by MRP
• In-class MRP exercise and case study
• Economic order quantities in MRP; comparison of MRP versus traditional order point inventory control
• MRP versus manufacturing resources planning (MRP II); concept and benefits of capacity requirement planning (CRP)
• Addressing MRP problems: inventory record errors; item proliferation at the master schedule level; reducing work-in-process inventory
• Comparison of MRP versus just-in-time; goal of managing inventory versus eliminating inventory; role of setup time reduction; Kanban (pull system) inventory control; implications for material usage rates and quality
STRATEGIC OUTSOURCING (1 day/1 credit)

Outsourcing will be defined, as well as outlining how to align it to your supply chain. The process to evaluate and manage outsourcing opportunities will also be examined. It boils down to understanding what outsourcing is and determining who is best qualified to perform the work up and down the supply chain. Once this is understood, the seminar takes you through an evaluation process including key contract clauses and relationship management principles to position your business relationships for success.

WHO SHOULD ATTEND
Purchasing professionals: vice-presidents, directors and managers evaluating or assisting in an outsourcing exercise; Purchasing professionals or line of business owners re-engineering their supply chains and looking at outsourcing opportunities; consulting organizations evaluating outsourcing as a business opportunity.

YOU WILL LEARN
This is a one-day intensive seminar focusing on:
• How to evaluate the economics of an outsourcing vs. insourcing opportunity
• Outsourcing in an unionized environment
• Tips on developing contracts
• How to manage the relationship after the contract is signed

COURSE CONTENT
• Outsourcing: what is it and why are companies using it as a competitive strategy
• Linking outsourcing practices to corporate strategy and core competencies
• Definitions; a look at companies and industries that outsource; common business issues
• Business functions that are commonly outsourced
• Infrastructure vs. business process outsourcing
• Benefits and risks of outsourcing
• Overview of the outsourcing process starting from the feasibility study to an evaluation of alternatives
• Developing the project team, dealing with employee concerns and structuring the contract
• Overview of outsourcing in a unionized environment and options for structuring a business relationship
• Measuring supplier’s performance
• Managing the business relationship
• Case study discussions highlighting many of the core issues, from the decision to outsource to contract development

STRATEGIC SOURCING (1 day/1 credit)

‘Strategic’ buying practice will be defined as well as the ‘tactical’ buying practice employed by many companies today. The differences will be detailed such that a tacit understanding is reached with attendees on what the change to strategic buying practice will require.

From the perspective of the supplier, the customer and finally the buying professional, the seminar will explain what is required from a customer/supplier perspective to initiate the program and where and when strategic supply management works well.

Additionally, we will define what is required internally within the company to proceed with the ‘strategic’ supply process.

WHO SHOULD ATTEND
This seminar will benefit purchasing and supply management professionals responsible for moving their purchasing methodologies forward to strategic relationships dependent upon mutual success in the marketplace, as well as senior executives involved in advancements in purchasing practices, customer/supplier relationship development and complete supply chain improvement.

YOU WILL LEARN
• Strategic sourcing objectives
• Supplier value added services
• How to evaluate the present structure and to make the change
• How to determine strategic commodities and suppliers
• Purchasing impact and skill set requirements
• Supply base attractions and evaluations
• How to optimize strategic sourcing relationships

COURSE CONTENT
• Tactical vs Strategic sourcing and implications
• New purchasing measurement criteria necessary
• How to evaluate supply in the global market and its impact on strategic sourcing
• Prospective selection
• Reducing resource requirements throughout the supply chain
• Combining of resources in areas of electronic sourcing/supply relationships for mutual benefit
• How to evaluate “soft” cost items and their inclusion in the strategic sourcing relationship as well as their value to the organization
• Strategic relationship optimization
Purchasing Management Association of Canada

Implementing Highly Cooperative Customer-Supplier Relationships
(2 days/2 credits) *(Formerly Implementing Customer-Supplier Alliances)*

**WHO SHOULD ATTEND**

Managers and functional professionals who design and implement supplier-buyer alliances in manufacturing and service organizations. The seminar will help participants build alliances as well as benchmark existing ones. Personnel from both buyer and supplier organizations are encouraged to attend to develop their alliance-building skills together.

**YOU WILL LEARN**

- How to identify prime opportunities for engaging in supplier alliances
- How alliances benefit both the supplier and customer
- To understand the selection process for alliance partners and the role of upper management, various organizational functions, customers and suppliers in that process
- How to negotiate the major interests and issues involved in the design of mutually beneficial alliances
- To identify, anticipate and solve problems in an ongoing alliance

**COURSE CONTENT**

- How alliances fit with partnering, re-engineering, outsourcing, total quality, industry rationalization; why alliances are critical to an organization’s core competencies and competitive advantage
- Where alliances fit among all other relationships with suppliers
- Determining when an alliance makes sense
- The process and models for analyzing a supply base to find opportunities for greater cooperation with suppliers leading to an alliance
- Selling the concept to others in your organization: getting top management approval and cross functional team involvement
- Finding the ideal partner: developing specifications; alternative frameworks for evaluating a potential partner
- How to convince a supplier or customer to become a partner; why potential partners may refuse; why organizations pick a “bad” partner; the role of contracts and agreements
- Building an alliance: negotiating a win/win relationship; trust and communications; organizing an alliance-building team and support network; defining roles and responsibilities for each partner; framework for achieving joint agendas
- The customer/supplier satisfaction index; agenda building; how expectations and prior beliefs may affect alliance performance; managing team and organizational dynamics; what to do when people cannot agree

In addition to supply professionals, this seminar will benefit engineers, marketing, operations and financial managers, as well as business unit and general managers.

**WHO SHOULD ATTEND**

In addition to supply professionals, this seminar will benefit engineers, marketing, operations and financial managers, as well as business unit and general managers.

**YOU WILL LEARN**

- How to develop and implement purchasing strategy and policy
- How to source and select new suppliers based on your purchasing strategy and the needs of your organization
- How supply can contribute effectively to organizational goals and strategies
- How reverse marketing adds a totally new way of providing competitive advantage
- The 11-step process of reverse marketing
- How reverse marketing can make significant improvements to quality, cost and time effectiveness
- How to identify reverse marketing opportunities

**COURSE CONTENT**

- How to plan a successful reverse marketing project
- A look at the fundamentals of developing new suppliers of all sizes
- Key factors and benefits of adopting an imaginative and assertive approach to supplier development
- Creating and implementing purchasing policy and strategy in relation to source selections
- Defining reverse marketing, its purpose and its potential
- The conversion of supply to organizational goals and objectives
- The 11-step reverse marketing process
- Using reverse marketing to achieve quality, cost, time, environmental, social, partnering and global objectives
- Reverse marketing with small, medium and large suppliers
- Case study - creating a reverse marketing plan to meet a specific requirement
Purchasing, supply management and materials management professionals will be especially interested, but this seminar will also benefit individuals from other disciplines such as quality assurance, who are involved in the supplier management process.

• Why and when certification is important
• Possible pitfalls, critical success factors
• Implementation strategies
• How to integrate a vendor certification program into your overall supplier management process
• How to evaluate, measure and monitor your certified suppliers
• Essential quality management processes
• The role of teamwork
• How to measure success

WHO SHOULD ATTEND

YOU WILL LEARN

• Defining certification; developing objectives for vendor certification
• A look at techniques that form a quality certification program within your overall supplier management process.
• The importance of teamwork in the program; determining who should be involved and their responsibilities
• Factors which assist or impede the certification process; taking advantage of helpful factors, avoiding factors that impede
• Tools for conducting a vendor certification evaluation and audit
• Measurement criteria for probation, decertification and recertification
• A discussion of product types that are suitable for vendor certification

COURSE CONTENT
EVALUATING PURCHASING PERFORMANCE

APPLIED BENCHMARKING IN PURCHASING (1 day/1 credit)

WHO SHOULD ATTEND
Individuals interested in improving the purchasing and supply management process of their organization, whether policy makers or front-line implementers. This includes directors of purchasing and supply management as well as managers, buyers and other purchasing and supply management professionals.

YOU WILL LEARN
- The definition of benchmarking and how its practice drives change in an organization
- How benchmarking allows meaningful comparison to be done at the internal, industry or competitor level; and at the functional or generic levels
- That, for procurement professionals, the need to benchmark is driven by competition for scarce resources in the public and private sectors, encouraging them to strive to perform at optimum levels of purchasing efficiency and effectiveness

COURSE CONTENT
- Why benchmarking is an important part of continuous process improvement for all firms
- What to benchmark
- The various types of benchmarking and how each type can be used
- The steps to take in the benchmarking process
- How to determine the processes behind the numbers; what is driving an organization's success?
- What to do with the results of the benchmarking process
- Measuring your performance and identification of the gap
- How to implement and monitor a benchmarking program

EVALUATING SUPPLY EFFECTIVENESS (2 days/2 credits)

WHO SHOULD ATTEND
Purchasing professionals, accountants, financial managers and anyone else dealing with the "accountability" side of the purchasing function.

YOU WILL LEARN
- The concepts underlying effectiveness evaluation and the related concepts of efficiency and economy
- An understanding of how these concepts, beginning at the organizational level, flow through to functional levels such as purchasing, and down to the individuals performing specific roles and tasks
- The ability of the purchasing function to earn respect within the organization

COURSE CONTENT
- Mission statement and organizational goals
- Organizational productivity and effectiveness evaluation
- Performance evaluation at the purchasing function level
- Performance evaluation at the individual level
- Evaluating purchasing effectiveness
- Case analysis
- Purchasing performance benchmarks

Turbulent times force organizations to reassess everything they do, how they do it, and how it should be done more effectively. The current impetus for the focus on organizational effectiveness includes: (1) reengineering and downsizing, (2) the trend to outsourcing (the "virtual" organization) and focusing on core competencies, (3) total quality management (TQM) and worldwide standardization, and (4) increased global competition. This seminar first examines the concepts and components of organizational effectiveness and then focuses on the effectiveness of the procurement function, keeping in mind the big picture, i.e. where the organization is headed strategically. Topics include the mission, vision, benchmarking, and measuring effectiveness at three levels in the organization. Each seminar participant will leave with a plan of implementing a purchasing effectiveness evaluation system tailored to their own organization. The theory and tools covered are put into practice through case analysis and group discussions.
The PMAC credit seminar, "Ethical Issues in Purchasing and Supply Management" is available via the Internet. Participants from any location, in Canada or worldwide, with Internet access may take part in the seminar.

The seminar has the same volume of content coverage as other PMAC one day credit seminars, however participants have up to one month to complete the seminar once they sign-on (register).

This seminar provides one credit for those enrolled in the C.P.P. Accreditation Program and for those pursuing the PMAC Certificate in Purchasing.

**YOU WILL LEARN**

- To recognize and analyze “ethical” situations in supply management
- Four traditional ethical theories used in business
- A practical decision making procedure
- To apply theories to specific situations
- To understand ethics and make ethical decisions

**SIGNING UP FOR THE INTERNET VERSION**

Access PMAC’s website, www.pmac.ca for registration information or contact the National Office at 1 888 799-0877, 416 977-7111 or e-mail info@pmac.ca
For more information about PMAC membership, contact your local PMAC Institute. To register for a credit seminar, contact the seminar registration contact listed below or, where there is no seminar contact, the Institute office.

**NATIONAL OFFICE**
Purchasing Management Association of Canada
2 Carlton Street, Suite 1414
Toronto, ON M5B 1J3
Tel: (416) 977-7111 Fax: (416) 977-8886
Toll free: 1-888-799-0877
E-mail: info@pmac.ca
Website: www.pmac.ca

**NEW BRUNSWICK***
New Brunswick Institute of the Purchasing Management Association of Canada
P.O. Box 602
Saint John, NB E2L 4A5
Tel: (506) 633-5099 Fax: (506) 532-3630
Seminar Contact: Shawn Cormier, C.P.P.
Tel: (506) 202-7841 Fax: (506) 202-2566
E-mail: Shawn.cormier@irvingoil.com
Website: www.pmacnb.ca

**ONTARIO**
Ontario Institute of the Purchasing Management Association of Canada
2 Carlton Street, Suite 1317
Toronto, ON M5B 1J3
Tel: (416) 977-7566 Fax: (416) 977-4135
E-mail: info@ontarioinstitute.com
Seminar Contact: Amy Nixon
Tel: (416) 977-7566 ext. 2133
Fax: (416) 977-4135
E-mail: anixon@ontarioinstitute.com
Website: www.ontarioinstitute.com

**NEWFOUNDLAND***
Newfoundland Institute of the Purchasing Management Association of Canada
P.O. Box 2460 Station “C”
St. John’s, NL A1C 6L3
Tel: (709) 724-1937 Fax: (709) 724-5625
Seminar Contact: Nancy Harte, C.P.P.
Tel: (709) 778-4033 Fax: (709) 724-5625
E-mail: nancy.harte@halliburton.com

**QUEBEC**
Corporation des approvisionneurs du Québec (C.A.Q.)
248 B, rue St-Jacques
Saint-Jean-sur-Richelieu, QC J3B 2K9
Tel: (450) 357-0033 Fax: (450) 357-0044
Toll free (Quebec only): 1-800-977-1877
Seminar Contact: Chantal Blais
E-mail: cbiais@caq.qc.ca
Website: www.caq.qc.ca

**SASKATCHEWAN**
Saskatchewan Institute of the Purchasing Management Association of Canada
Site 600 Box 65 RR6
Saskatoon, SK S7K 3J9
Tel: (306) 653-8899 Fax: (306) 653-8870
Toll free: 1-866-665-6167
E-mail: sipmac@pmac.ca

**NORTHWEST TERRITORIES***
Northwest Territories Institute of the Purchasing Management Association of Canada
P.O. Box 2736
Yellowknife, NT X1A 2R1
Tel: (867) 669-4173 Fax: (867) 669-4123
Seminar Contact: Barbara Thorburn
Tel: (867) 880-2234
E-mail: barb.m.thorburn@bhpbilliton.com

**NOVA SCOTIA***
Nova Scotia Institute of the Purchasing Management Association of Canada
P.O. Box 955
1800 Argyle Street, 8th floor
Halifax, NS B3J 2V9
Tel: (902) 425-4029 Fax: (902) 425-8308
Seminar Contact: Colleen Millen
Tel: (902) 873-2250 x 1842
Fax: (902) 873-4511
E-mail: colleen.millen@impaerospace.com
Website: www.nspmac.ca

**ALBERTA***
Alberta Institute of the Purchasing Management Association of Canada
Suite 612, Centre 104
5241 Calgary Trail Southbound
Edmonton, AB T6H 5G8
Tel: (780) 944-0355 Fax: (780) 944-0356
Toll free: 1-866-610-4089
E-mail: info@aipmac.ab.ca
Seminar Contact: Jacki Richards
E-mail: jrichards@aipmac.ab.ca
Website: www.aipmac.ab.ca

**BRITISH COLUMBIA***
British Columbia Institute of the Purchasing Management Association of Canada
# 327 – 1080 Mainland Street
Vancouver, BC V6B 2T4
Tel: (604) 408-4411 Fax: (604) 408-4422
Toll free: 1-800-411-7622
Seminar Contact: Joan Abbott
E-mail: admin@bci-pmac.bc.ca
Website: www.bci-pmac.bc.ca

**MANITOBA***
Manitoba Institute of the Purchasing Management Association of Canada
200 – 5 Donald Street
Winnipeg, MB R3L 2T4
Tel: (204) 231-0965 Fax: (204) 233-1250
Toll free: 1-877-231-0965 (area code 204 only)
E-mail: mbpmac@mb.sympatico.ca
Seminar Contact: Jamie Bednarz
Website: mipmac.com

*A customer service representative at the National Office will also be happy to take your call regarding membership, education programs and other available association services. Please call 416-977-7111 or 1-888-799-0877, Fax 416-977-8886 or e-mail info@pmac.ca*
Hitting high notes with your bottom line

Today, more than ever, purchasing and supply management play a strategic role in bottom line performance and profitability.

As ‘big picture’ thinkers working in harmony with suppliers and partners, purchasing professionals help enhance organizational effectiveness, customer satisfaction, and shareholder value. PMAC is the recognized leader in the development and advancement of world class supply management. We offer an accredited program leading to the highly-acclaimed Certified Professional Purchaser (C.P.P.) designation. For more information, please call PMAC at (416) 977-7111, e-mail info@pmac.ca or visit www.pmac.ca

Strategic Perspective. Competitive Advantage.

PMAC
Purchasing Management Association of Canada™

www.pmac.ca