

Enhancing Procurement Capabilities Programme Summer/Autumn 2010

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- Procurement
 - Negotiation
 - Legal
 - Marketing
 - Project Management

Enhancing Procurement Capabilities

Summer/Autumn 2010

As part of our commitment to supporting procurement capability, Scotland Excel is pleased to extend our Enhancing Procurement Capabilities Training Programme for 2009-2010 to cover the period 4th May 2010 to 1st October 2010.

This extension will allow Scotland Excel to continue development work with the Local Authority Learning & Development Strategy Group on competencies and training for devolved procurement staff, and plan a comprehensive training programme for all procurement professionals for 2010-2011.

This booklet contains details of our programme delivery during the period May – October and incorporates the most popular courses from our current training brochure, together with two new additional courses.

We are delighted to continue offering this valuable learning and development resource to local authorities in Scotland, and look forward to welcoming you at one of our events planned during the period up to 1st October 2010.

For further information or to book places please contact Scotland Excel on 0845 606 8726 or e-mail training@scotland-excel.org.uk

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Course type: Awareness

Buying Construction Projects

Course Duration
1 day

Cost (excl. VAT)
£150 per delegate

Target Audience
Staff who need to acquire or develop understanding of construction procurement

Purpose
By the end of the course delegates should be able to understand the following:

- Construction market and the range of services provided from planning, design and construction through to multi disciplinary professional services
- Different types of construction contract and the relationship with payment mechanisms and risk allocation
- The way in which construction projects are managed, in particular, the relationship between project and contract management
- The importance of construction to the public sector in terms of expenditure, sustainability and the range and history of related government and industry initiatives

Course Content

- Construction market – key players and capability
- Contract types and payment mechanisms and their main characteristics
- Construction and contract management
- Government and industry initiatives
- Procurement role

Delivery Style
Presentation of content and discussion supported by group exercises

Linked Courses
Specification Writing, Risk Management, Contract Management and Supply Chain Management

Date and Location
22/09/2010 Perth
tbc Aberdeen

Course type: Practical Application

Contract Management

Course Duration
1 day

Cost (excl. VAT)
£150 per delegate

Target Audience
Staff engaged in procurement, contract preparation or contract and supplier management

Purpose

- To provide delegates with an overview of contract management, highlighting process and techniques, and discussing the controls required to manage contracts more effectively
- To build understanding of the interdependencies of procurement planning, contract strategy, and subsequent management of contracts and suppliers to enable staff to optimise these areas (contract strategy and management)

Course Content

- The role and scope of contract management
- The Contract Management Process

- Types of contract
- Supply positioning and supplier preferencing
- The role of the contract manager
- The downstream contract management process
- Controls
- Managing risk
- Monitoring and measuring performance
- Developing and maintaining interpersonal relationships

Delivery Style
Presentation of content and tutor-led discussion supported by case law and case study based exercises

Linked Courses
Supplier Debriefing and Supply Chain Management

Date and Location
09/06/2010 Inverness
tbc Aberdeen

Cost/Price Structure Analysis

Course Duration

1 day

Cost (excl. VAT)

£150 per delegate

Target Audience

Procurement professionals who need to understand the relationship between a suppliers cost, their profit objectives and price

Purpose

By the end of the course delegates should be able to understand the following:

- Financial accounts and use them to derive a model cost structure
- Various costing techniques used by suppliers
- How profit margins are set and be able to define “profit”
- How suppliers set prices for their products/ services
- How and when to ask for cost breakdown and why suppliers resist such requests
- How costs are “hidden” or “disguised”

- What is meant by “key cost drivers” and how procurement can help remove unnecessary cost from prices
- Why suppliers request price increases and how to deal with them

Course Content

- Financial statements and cost model structure
- Costing techniques – absorption and marginal costing
- Pricing methods
- Cost modelling
- Open book costing
- Cost drivers and levers

Delivery Style

Presentation of content and tutor-led discussion supported by group exercises

Linked Courses

Determining the Total Cost of Ownership and Strategic Price Management

Date and Location

24/08/2010 Edinburgh

10/09/2010 Paisley

Specification Writing

Course Duration

1 day

Cost (excl. VAT)

£150 per delegate

Target Audience

Procurement and non-procurement managers who have a key input to the development of specifications to be incorporated into tender documents

Purpose

By the end of the course delegates should:

- Understand the various types of specification
- Understand who is responsible for specification writing
- Be able to avoid the common aspects of specifications that confuse and lead to poorly executed contracts
- Be aware of the impact of poorly drafted specifications
- Understand the role of procurement in specification writing

Course Content

- Definition
- What goes wrong?
- Types of specification
- Impact on contract management
- Accuracy and clarity
- Hints and tips on drafting clear specifications
- Setting SMART measures
- Developing a specification
- Key elements of a specification
- KPI's
- Exercise in drafting a specification

Delivery Style

Presentation of content, including use of slides and tutor-led discussion supported by group exercises

Linked Courses

Competitive Tendering

Date and Location

13/09/2010 Paisley

tbc Aberdeen

Strategic Price Management

Course Duration

1 day

Cost (excl. VAT)

£150 per delegate

Target Audience

Senior procurement professionals who need to identify and understand supplier marketing and pricing strategies to enable them to develop effective procurement strategies

Purpose

- To build understanding of the varied nature of commercial relationships and the need for different procurement objectives and strategies depending on the scale and risks associated
- To consider the interface between buyer and seller from both the sales and procurement perspectives
- To understand how suppliers analyse customer markets
- To understand how suppliers segment customers
- To understand how and why suppliers set different prices for various customers
- To understand various methods of pricing
- To understand various pricing strategies that can be used by suppliers to exploit or develop markets
- To review the concept of the total cost of ownership
- Understand how to use knowledge of supplier marketing/pricing strategies to develop effective procurement strategies

Course Content

- The nature of markets
- Drivers of competition in a market
- Porter's 5 Forces
- Business strategy
- Pricing strategies
- Product life cycles
- Total cost of ownership
- Methods of pricing and the difference between cost and price
- Pareto analysis
- Supply positioning
- Product portfolio analysis – The ‘Boston Matrix’
- Supplier preferencing
- Market management matrix
- The changing buyer/supplier interface

Delivery Style

Presentation, tutor-led discussion and exercises

Linked Courses

Cost/Price Structure Analysis, Determining the Total Cost of Ownership and Strategy Development and Implementation

Date and Location

10/08/2010 Paisley

Improving Purchasing Performance (The Growing Importance of Purchasing)

Course Duration

1 day

Cost (excl VAT)

£150 per delegate

Target Audience

Targeted at those personnel in the public/local authority sector who have some Procurement responsibility, within limited budgets. It is recognised that delegates may have varied responsibilities and are not Professional Purchasers.

Purpose

By the end of the course delegates should be able to:

- Understand the principles involved in the buying process
- Understand key terms and concepts

It will enable newcomers to the profession or function to become more aware of the purchasing cycle, how markets work and “value for money”.

Content

- The role of purchasing and its place in an organisation
- The role of the buyer

- The purchasing cycle
- Understanding the concepts of “value for money” and “best value”
- Putting the six rights into position: performance, product, time, legality, source and price
- The role and types of specification
- Sourcing through Excellent Suppliers
- Understanding Markets
- The need for good contractual relationships, based on Terms and Conditions of Purchase that are fair and reasonable
- Managing risks
- Keeping records, measuring performance
- Corporate Social Responsibility (sustainable procurement)

Delivery Style

Presentation of content and tutor led discussion supported by group exercises.

Linked Courses

EU procurement directives, Specification writing, Competitive tendering, Determining the total cost of ownership, Supplier debriefing

Date and Location

04/05/2010 Paisley

11/05/2010 Perth

Total Cost of Ownership

Course Duration

1 day

Cost (excl. VAT)

£150 per delegate

Target Audience

Procurement staff purchasing commodities that may incur significant costs beyond the initial purchase price of the product or service acquired

Purpose

To enable procurement professionals to identify elements of cost associated with the purchase of a product or service over its whole life cycle

Course Content

- Introduction to TCO, costing systems and business environment
- Summary of TCO stages
- Application of DCF technique to TCO
- Managing the TCO

Delivery Style

Presentation supported by worked examples and tutor-led discussion

Linked Courses

Cost/Price Structure Analysis

Date and Location

25/08/10 Edinburgh

Supplier Debriefing

Course Duration

1 day

Cost (excl. VAT)

£150 per delegate

Target Audience

Procurement staff and contract managers involved in debriefing suppliers following pre-qualification and contract award

Purpose

By the end of the course delegates should be able to:

- Build understanding and consensus on how to use debriefing to improve market capability and future bids
 - Implement the requirements of European Procurement Legislation and understand the implications of the Freedom of Information Act
- ### Course Content
- Purpose of de-briefing
 - Planning of the de-briefing process and communication internally and with suppliers
 - Understanding the supplier's perspective in order to provide useful feedback
 - Formulating relevant and effective evaluation criteria compliant with EU procurement
 - Legislation and use of evaluation results for de-briefing

- European procurement legislation
- General provisions regarding de-briefing
- Specific requirements of the ‘Alcatel’ provisions
- Freedom of Information Act
- Requirements regarding disclosure
- Confidentiality and exemptions
- Information Commissioner guidance and recent case law
- Conducting face to face de-briefing
- Learning from and managing supplier feedback and challenge
- Mobilising the winning bidder
- Related public sector policy

Delivery Style

Presentation of content and tutor-led discussion supported by an interactive case study and role play

Linked Courses

EU procurement directives, Use of selection and award criteria, Conducting a competitive dialogue, Competitive tendering

Date and Location

15/09/2010 Paisley

tbc Aberdeen

EU Compliant Supplier Selection and Contract Award

Course Duration

1 day

Cost (excl. VAT)

£150 per delegate

Target Audience

Staff who have a working knowledge of EU Procurement Legislation and wish to explore supplier selection and contract award in more depth.

Purpose

By the end of the course delegates should be able to:

- Understand how to construct effective supplier selection and award processes which are compliant with EU Procurement Legislation

Course Content

- The tender process and the purpose of contract terms, specification, selection and award criteria

- Ensuring that the selection and contract award processes are both EU compliant and effective in delivering the business need - the linking of selection and award criteria to business need
- Relevant aspects of EU Procurement Legislation
- Design of selection and award criteria
- Assessment processes and scoring matrices

Delivery Style

Presentation of content and tutor-led discussion supported by group exercises

Linked Courses

Frameworks and Mini Competitions, Conducting a Competitive Dialogue, Specification Writing, Competitive Tendering, Determining the Total Cost of Ownership and Supplier Debriefing

Date and Location

18/05/2010 Fife

24/06/2010 Perth

25/06/2010 Inverness

tbc Aberdeen

Introduction to Negotiation

Course Duration

1 day

Cost (excl. VAT)

£150 per delegate

Target Audience

Staff new to procurement with little or no experience of negotiation, needing an awareness of the negotiation process

Purpose

This course is to provide a basic overview of negotiation and the negotiation process. Key aims for delegates will be to:

- Understand what is meant by negotiation and the different types of negotiation
- Understand when to negotiate
- Be aware of the different styles of negotiation (5 key approaches)
- Understand the key stages of the negotiation process (6 important phases)
- Recognise some tactics (7 useful tactics)

Course Content

- Complete a negotiation profile
- Learn what is meant by “negotiation”
- Be able to identify when a negotiation is taking place
- Learn about the key phases of a negotiation exercise
- Learn about negotiation styles
- Useful tactics
- Be able to understand different types of negotiation

Delivery Style

The training course is based on ‘5/6/7’. The approach is highly interactive. Delegates will complete the negotiation profile and the tutor will use this as a basis for delegates to understand their own profile and an ‘ideal’ profile. The approaches, phases and tactics will be given as handouts and applied to actual scenarios.

Linked Courses

Advanced and Practical Negotiation

Date and Location

18/06/2010 Paisley

Practical Negotiation

Course Duration

2 days

Cost (excl. VAT)

£520 per delegate

Target Audience

Procurement professionals who have a basic understanding of negotiation

Purpose

By the end of this course delegates will understand the key phases of the negotiation process, how to prepare and plan for the delivery of successful negotiations and recognise how behaviour is key to achieving a successful negotiation outcome. The course is based on live negotiation where theory is applied and feedback provided. The course will also examine the rules and constraints for negotiating under EU public procurement directives. Key aims for delegates will be to:

- Understand the negotiation process and phases of negotiation
- Understand how to prepare and plan for a negotiation
- Understand how to set objectives for achieving a successful negotiation outcome
- Understand what behavioural skills are required to secure a successful negotiation outcome

- Understand when you are in a strong or weak negotiation position and what tactics to adopt
- Examine EU public procurement rules regarding negotiation and post tender clarifications
- Constructive feedback and review
- Repeat process
- Write up the deal
- Present outcome
- Action plans

Course Content

- Complete/update a negotiation profile
- 5 key approaches (persuasion methods) – review
- Model for moving people
- 6 important phases in the process
- Prepare for plan and complete a negotiation with video

Delivery Style

See above Introduction to Negotiation for details of delivery style

Linked Courses

Advanced Negotiation, Introduction to Negotiation and How Sellers Sell

Date and Location

31/08/2010-01/09/2010 Paisley

Advanced Negotiation

Course Duration

2 days

Cost (excl. VAT)

£520 per delegate

Target Audience

Senior managers/experienced negotiators who need to use advanced techniques over a range of different types of negotiation (internal and external)

Purpose

Delegates will get the opportunity to study in greater depth behavioural skills, negotiation styles and advanced negotiation planning and tactics. The course is based on live negotiation where theory is applied and feedback provided.

Key aims for delegates will be to:

- Learn about different negotiation styles
- Learn how to assess the other party’s negotiating position
- Learn how to effectively use verbal and non-verbal communication
- Understand how to challenge and persuade in a negotiation
- Non-verbal communication
- Challenging techniques
- Persuasion mechanisms
- Matching and achieving outcomes
- “Hard” negotiation tactics
- Conditioning behaviour
- Managing relationships and conflict
- Metrics used to measure success

Course Content

- Relevant research in negotiation
- Key phases in the negotiation process
- Information gathering
- Profiling and identifying the other party’s objectives
- Negotiation styles
- Questions and their use in negotiations
- Behavioural awareness
- Oral communication and the impact of positive and negative behaviour

Delivery Style

Highly interactive, based mainly on role-play, video playback, break out exercises and case studies, with an element of formal learning

Linked Courses

Introduction to Negotiation, Practical Negotiation and How Sellers Sell

Date and Location

30/09/2010-01/10/2010 Paisley

Competitive Dialogue

Course Duration

1 day

Cost (excl. VAT)

£150 per delegate

Target Audience

Procurement managers and staff plus non-procurement managers and staff responsible for procurement projects using the Competitive Dialogue Procedure

Purpose

By the end of the course delegates should be able to:

- Build detailed understanding of the Competitive Dialogue Procedure and the key issues to be considered in the planning and implementation stages

- Highlight risks which are likely to arise in connection with Competitive Dialogue and provide strategies for dealing with these

Course Content

- Review of related aspects of European Procurement Legislation

- Interactive case study

Delivery Style

Presentation of content and tutor-led discussion supported by an interactive case study

Linked Courses

Use of Selection and Award Criteria, Supplier Debriefing and Competitive Tendering

Date and Location

26/05/2010 Paisley

Competition Law and Cartels

Course Duration

1 day

Cost (excl. VAT)

£150 per delegate

Target Audience

Middle and senior procurement professionals who would like to understand how markets and competition law can influence the procurement process

Purpose

By the end of the course delegates should be able to:

- Have a better understanding of the main regimes regulating abuses of competition law, including the roles played by the regulatory agencies responsible for enforcement
- Have greater confidence to know where and how potential infringements of competition law are being committed (either by suppliers or by the purchasing organisation)
- Have a better awareness of the consequences of infringements of competition law and the mechanisms for ensuring compliance within the purchasing organisation

Course Content

- Identification of main forms of anti-competitive practice (collusion, abuse of a dominant position)
- Relationship between the two regimes governing competition law enforcement in the UK

- Role of competition law authorities
- Collusion (Cartels)
- Specific forms of cartel abuse (e.g. price fixing, bid-rigging, market segregation, tie-in sales and bundling)
- Market definition – identifying the relevant market
- Exemptions (including block)
- Abuse of a Dominant Position – meaning of dominant, abuse (including predatory pricing)
- Enforcement powers of investigatory bodies – dawn raids, copying of relevant documentation, interviewing of personnel etc
- Sanctions – corporate fines, personal prosecution of senior personnel, whistle-blowing & exemptions from fines; civil actions for damages; class actions
- Monopolies & Mergers – approach adopted by European Commission and Competition Commission
- Compliance policies and procedures

Delivery Style

A mix of seminar presentation, tutor-led discussion and group exercises. A short DVD produced by the Office of Fair Trading will also be used during the event.

Linked Courses

There are no linked courses

Date and Location

03/09/2010 Paisley

EU Procurement Directives

Course Duration

1 day

Cost (excl. VAT)

£150 per delegate

Target Audience

Targeted at procurement managers and staff plus non procurement managers and staff responsible for procurement projects subject to European procurement legislation.

Purpose

- To provide an introduction to all elements of the 2004 public sector consolidated directive and UK regulations of 1 February 2006
- To help ensure consistent application of the directive across the public sector

Course Content

- History of EU procurement legislation and organisations covered
- Review of types of supply, procedures, thresholds and calculation of values
 - Supplies, services and works
 - Open, restricted, negotiated, accelerated and the new competitive dialogue procedure
 - Notices and timescales
 - Consolidated thresholds and calculation of values
 - Aggregation, lots and discrete operating units
 - Exclusion provisions
 - Communications
- Frameworks and consortia
 - Contracts and frameworks

- Duration

- Single or multi party

- Awarding work packages

- Electronic procurement

- Auctions, dynamic purchasing systems and methods of communication

- Technical specifications, sustainability issues and award criteria

- Performance specifications

- Standards

- Incorporation of case law

- Selection criteria and CRB standard disclosures

- Most economically advantageous award criteria and relative weightings

- ‘Alcatel’ provisions

- Remedies including impact of the ‘new’ 2007 Remedies Directive (2009 UK Regs)

Delivery Style

Presentation of content and tutor led discussion supported by a group exercise.

Course Materials

TBC

Linked Courses

Specification writing, EU frameworks and mini competitions, Use of selection and award criteria, Supplier debriefing, Competitive tendering, Conducting a Competitive Dialogue.

Date and Location

19/05/2010 Stirling

14/09/2010 Paisley

Frameworks and Mini Competitions

Course Duration

1 day

Cost (excl. VAT)

£150 per delegate

Target Audience

Staff who have a working knowledge of EU Procurement Legislation and wish to explore the procurement, management and use of frameworks in more depth

Purpose

By the end of the course delegates should be able to:

- Understand the processes of procuring, managing and using frameworks in compliance with EU Procurement Legislation

Course Content

- Relevant aspects of EU Procurement Legislation
- Relevance to 'partially exempt' procurement e.g. class B services
- Role of the Framework Manager
- Impact of the New Remedies Directive

Delivery Style

Presentation of content and tutor-led discussion supported by group exercises

Linked Courses

Use of Selection and Award Criteria, Supplier Debriefing and Competitive Tendering

Date and Location

23/06/2010 Paisley

21/09/2010 Perth

tbc Aberdeen

Managing Complex Relationships

Course Duration

1 day

Cost (excl. VAT)

£150 per delegate

Target Audience

Procurement professionals handling diverse business relationships

Purpose

By the end of the course delegates should be able to:

- Have a clear strategy to control complex business relationships
- Understand the tactics employed by 'tier one' suppliers to drive price and combat the approach
- Understanding the relationship between cost and price

Course Content

- Stakeholder mapping, management, influencing and review tools and techniques
- Assessing different approaches to relationship management
- Prioritising the supply chain – preferencing, positioning and tailoring our style for maximum return and minimum conflict
- Fundamentals of communication – using the message to attract support and persuade effectively
- Key conflict management tips and techniques

Delivery Style

Presentation of content and tutor-led discussion supported by group exercises. 'Discovery led' discussion.

Linked Courses

How Sellers Sell and Marketing Procurement Services

Date and Location

01/06/2010 Perth

tbc Aberdeen

Marketing Procurement Services

Course Duration

1 day

Cost (excl. VAT)

£150 per delegate

Target Audience

Staff who work within a purchasing environment with a responsibility to promote the department to the rest of the business

Purpose

By the end of the course delegates should be able to:

- Recognise the importance of promoting the department to the rest of the business
- Recognise the benefits to the business of purchasing being involved at an early stage
- Change the view of stakeholders towards purchasing

Course Content

- Cultural change
- Levitt rings
- The importance of adding value to the rest of the business
- 'Selling' purchasing to the business
- Marketing for buyers
- Internal promotional techniques

Delivery Style

Presentation of content and tutor-led discussion supported by group exercises

Linked Courses

How Sellers Sell

Date and Location

02/06/2010 Inverness

Training Calendar Summer/Autumn 2010

May 2010	
Date	Course Topic and Location
4	Improving Purchasing Performance - Paisley
11	Improving Purchasing Performance - Perth
18	EU Compliant Supplier Selection and Contract Award - Fife
19	EU Procurement Directives - Edinburgh
26	Competitive Dialogue - Paisley
June 2010	
Date	Course Topic and Location
1	Managing Complex Relationships - Perth
2	Marketing Procurement - Inverness
9	Contract Management - Inverness
18	Introduction to Negotiation - Paisley
23	Frameworks/Mini Competitions - Paisley
24	EU Compliant Supplier Selection and Contract Award - Perth
25	EU Compliant Supplier Selection and Contract Award - Inverness
August 2010	
Date	Course Topic and Location
10	Strategic Price Management - Paisley
24	Cost Price Structure Analysis - Edinburgh
25	Total Cost Of Ownership - Edinburgh

31	Practical Negotiation (Day 1 of 2) - Paisley
September 2010	
Date	Course Topic and Location
1	Practical Negotiation (Day 2 of 2) - Paisley
3	Competition Law And Cartels - Perth
10	Cost Price Structure Analysis - Paisley
13	Specification Writing - Paisley
14	EU Procurement Directives - Paisley
15	Supplier Debriefing - Paisley
21	Frameworks/Mini Competitions - Perth
22	Buying Construction Projects - Perth
30	Advanced Negotiation (Day 1 of 2) - Paisley
October 2010	
Date	Course Topic And Location
1	Advanced Negotiation (Day 2 of 2) - Paisley

Fast track your CIPS Qualifications

The 2006 McClelland Review of Public Procurement recommended increasing the number of professionally qualified procurement staff in Scotland. As part of its role as the Centre of Procurement Expertise for Local Authorities in Scotland, Scotland Excel is offering access to three professionally-accredited programmes: **CIPS Level 2**, **Levels 2 and 3 Fast Track** and **Level 4 Fast Track**.

Delivered in a range of learning formats to help increase procurement expertise, these courses are designed to help staff gain recognised qualifications at a faster pace whilst also making substantial savings on tuition fees. Further details are provided below.

CIPS Level 2

The ideal entry point, Level 2 is primarily designed for those who are new to the purchasing function, or an overview for staff who are interested in developing their knowledge of purchasing.

The course comprises:

- 20 hours of e-learning
- 10 hours of self study
- 2 workshops
- Closed book examination

Cost (excl. VAT): £180 per delegate (a saving of £115 per delegate).

CIPS Levels 2 and 3 Fast Track

A new programme launched in April 2009, Fast Track enables staff to gain the CIPS level 2 and 3 qualification in 5 months rather than the traditional 15-18 months. The formal SVQ unit is included in this fast track programme. We achieved a 100% pass rate for the first programme.

- e-learning environment
- Classroom based learning
- Closed and open book examination
- Case study

Scotland Excel is offering this course in two locations:

Glasgow

Cost (excl. VAT): £995 per delegate (saving £800 per delegate).

Edinburgh

Cost (excl. VAT) £1,500 per delegate (saving £300 per delegate).

CIPS Level 4 Fast Track

We are introducing a new CIPS Level 4 Foundation Diploma which is achievable in half the time of standard courses, resulting in a diploma in 9 months. This fast track course will allow organisations to rapidly upskill staff whilst making cost savings on their staff development budgets.

- Classroom based learning
- 3 closed book examinations
- 2 work based assignments
- ILA funding may be available for certain candidates (www.ila.com)

Cost (excl. VAT): £1,195 per delegate.

If you would like to reserve places on any of the courses, request a booking form or discuss your training needs you can email us at training@scotland-excel.org.uk or call us on **0845 606 8726**.

Visit our website at www.scotland-excel.org.uk where you can access further information on all our training opportunities.

Courses can also be taught in-house and tailored to suit your organisation's requirements.

In partnership with Central College in Glasgow and the Chartered Institute of Purchasing and Supply (CIPS)





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