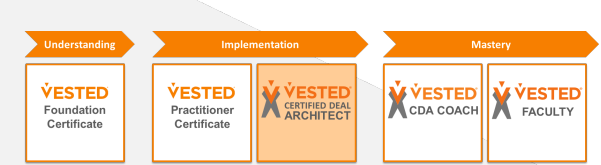




About Each Course in CDA Certification

Certified Deal Architect – Courses



Individuals wanting to become a Certified Deal Architect must complete *all* of the Vested courses and lead their organizations through the successful completion of a Vested Agreement, including completing a UT CDA Validation distance learning course



All orange highlighted courses above: required for CDA Certification



101 – Vested Five Rules (online)

- This course uses self-paced, video-based Topics allowing you to learn and do at your own pace
 - Seven Course Modules, with one Module dedicated to each of the Five Rules
- Each Module includes several short (20 minutes or less) “Topics” , which will help you learn how to apply the Vested “Five Rules” that are essential for creating a highly collaborative Vested business model
- The course provides a perfect blend of theory and practice – sharing real examples of how companies are applying each of the Five Rules
- The course also includes two self assessments – included to help you analyze how you have structured an existing relationship



The following page provides a course outline and learning objectives



What You Will Learn...

<i>Five Rules</i>	
Introduction	An Introduction to <i>Five Rules</i>
Rule 1	<i>Outcome-Based vs. Transaction-Based Business Model</i>
Rule 2	<i>Focus on the What, Not the How</i>
Rule 3	<i>Clearly Defined and Measurable Desired Outcomes</i>
Rule 4	<i>Pricing Model with Incentives to Optimize the Business</i>
Rule 5	<i>Insight vs. Oversight Governance Structure</i>
Conclusion	Applications and Next Steps

- Understand each of Vested’s Five Rules, including why they are so crucial
- Learn from real world examples of how companies have applied each of Vested’s Five Rules
 - Perform a self-diagnostic using the Vested 10 Elements self-assessment to see how one of your deals stacks up
- Understand the foundational elements needed begin your Vested journey
- Complete a “Readiness Assessment”
- Explore the options for Creating a Vested Agreement

Cost: \$475 as a standalone class
Free if registering for any of our other courses



Onsite: Hosted in Knoxville, Stockholm and Amsterdam or available as a private course

Virtual: The virtual option than spans five 4-hour virtual sessions

- The 3-Day Executive Education course is ideal for companies who are uncertain whether Vested is right for them, or who are unsure how to start
- The course is designed to provide a comprehensive overview of the Vested business model; attendees see first hand how to develop their own highly collaborative Vested business model with their strategic partners
- The small class size provides a rich experience where participants can interact with the UT Faculty who created the Vested business model. In addition, the interactive Real Play® sessions allow you to identify gaps in your existing agreement and help you create an action plan for what needs to be done to shift your relationship to a Vested business model that will enable you – and your partner – to unlock hidden potential by creating a true win-win Vested approach.



The following page provides a course outline and learning objectives

This class is co-sponsored with **Council of Supply Chain Management Professionals**

UT is an **IAOP Academic Alliance Partner**, and this class has been accepted for the **Certified Outsourcing Professional Bridge Program** and qualifies for **COP credit**.

UT is also an **NCMA Education Partner**. Counts towards **APICS** recertification



Based on research with...
HASLAM
 COLLEGE OF BUSINESS
 THE UNIVERSITY OF TENNESSEE, KNOXVILLE



What You Will Learn...



Even if you even if you don't intend to create a Vested agreement – you will walk away from this course with a practical, applied roadmap that will improve any relationship – not matter how big or small

Go behind the scenes with real case studies that profile how leading companies have applied a Vested business model to create true win-win business relationships yielding transformation results

- **Answer the question – Is Vested right for us?** by understanding the fundamental business model differences between traditional outsourcing approaches, performance-based approaches and the Vested business model – and when to apply them
- **Answer the question – Is our supplier is the right fit?** including identifying structural flaws and creating a roadmap for what needs to be done to shift your relationship to a Vested business model
- **Answer the question – Are we ready for Vested?** by working through the 5 key components of readiness and identifying your gaps
- **Answer the question – What resources do we need?** by getting hands-on experience and use of the Vested Toolkit[®], including practicing how to link Desired Outcomes to a Requirements Roadmap – a key to developing a sound Vested Agreement
- Leave the course with a **customized roadmap and action plan** for how you can begin to adopt a Vested business model in your organization

Cost: \$3,500*; \$1,750 If Repeating

This course can also be offered as a private course and delivered on site or in a virtual classroom for your organization



- Like the idea of Vested but not sure it is the appropriate business model for your situation?
- This seven-topic **FREE online course** will help you answer the question “Is Vested right for your situation?”
- Start by understanding the basics of what a sourcing business model is and end the course by completing a Business Model Map for your potential partnership where you will determine if Vested is the best path for you



The following page provides a course outline and learning objectives



What You Will Learn...

FREE

Is Vested Right for You?

Introduction	Introduction – Leveraging this class
Topic 1	Why Change to Sourcing Business Models?
Topic 2	Sourcing Business Model Theory
Topic 3	Analyzing Sourcing Business Models
Topic 4	Using the Business Model Mapping Tool
Topic 5	Case Study – Shifting Up the Sourcing Continuum
Topic 6	Finding Additional Resources
Topic 7	What is Next on Your Journey?

The *Is Vested Right for Your Situation?* online course consists of seven self-paced video topics – each 20 minutes or less. Upon completion you will be able to:

- Understand the differences between Vested and the other six Sourcing Business Models
- Access resources to help you share the fundamentals of Sourcing Business Models with Key Stakeholders within your company
- Create a Sourcing Business Model Map for your spend category/deal/relationship
- Answer the question “Is Vested the most appropriate business model for my situation?”

Cost: Free



Understanding

202 – Getting Ready For Your Vested Journey (online)

- You’ve learned enough about what Vested is
- You’ve completed a Sourcing Business Model Map and know it is a great option for your potential partnership
- So what is next?
- The **Getting Ready online course** is place to start your Vested journey
 - You will start the course with a quick readiness assessment
 - The course comes with 10 proven tools to help you close gaps in your readiness – including templates and resources to help you develop a project plan for your Vested initiative and determine who is best suited to be on your Deal Architect Team



The following page provides a course outline and learning objectives



What You Will Learn...

FREE

Getting Ready For Your Vested Journey

Intro	Getting the Most From This Course
Topic 1	Readiness Factors and Pitfalls
Topic 2	Completing a Readiness Assessment
Topic 3	Closing Gaps – Stakeholder Analysis
Topic 4	Closing Gaps – Vested Knowledge Base
Topic 5	Closing Gaps – Champions
Topic 6	Closing Gaps – Organizational Alignment
Topic 7	Closing Gaps – Guardrails
Topic 8	Building Your Team
Topic 9	Establishing a Steering Committee
Topic 10	Tips for Success – Structured Process
Topic 11	Planning Your Initiative

The **Getting Ready** online course consists of twelve self-paced video topics – each 20 minutes or less

- In this **online course** you will understand the five key "Readiness" factors that lay the foundation for a successful Vested journey, and complete a Readiness Self-Assessment to gauge your Readiness to kick off your Vested journey
- You will learn how to use resources and tools to help you close any gaps you have in Readiness before you start your Vested journey
- You will also learn from common pitfalls others have experienced so you can avoid similar mistakes

Cost: Free



Implementation

302 – 2-Day Collaborative Contracting

Onsite: Hosted in Knoxville, Stockholm and Amsterdam or available as a private course

Virtual: The virtual option than spans five 4-hour virtual sessions

- Strategic relationships require strategic contracts based a non-adversarial legal and contract framework that enables you to go beyond “Getting to Yes” to a new negotiation paradigm that allows you to “Get to We”
- To reap the rewards, you will need to master 21st century collaborative contracting approaches
- This advanced skills course and is ideal for those who are chartered to draft and negotiate strategic relationships on behalf of their companies. The course is a requirement for those seeking to become a Certified Deal Architect



The following page provides a course outline and learning objectives



What You Will Learn...

- Understand why and how to negotiate the foundation of the relationship prior to negotiating any deal points
- Learn and apply sound skills and techniques to help you encourage and document collaborative efforts between two non-competitive organizations (e.g., a buyer and supplier)
- Get hands on experience reviewing and drafting controversial contractual clauses in using your new skills
- Learn how to create “negotiating rules” with your business partner to make actual negotiations exponentially easier



Cost: \$2,250* / \$1,125 If Repeating

This course can also be offered as a private course and delivered on site or in a virtual classroom for your organization



Implementation

401 – Creating A Vested Agreement (online)

- Not everyone can come to the University of Tennessee. And organizations typically develop agreements with their business partner at a pace that is unique for them.
- For this reason we've created a unique **Creating a Vested Agreement online course** and comprehensive Vested Toolkit® you can use to help you to physically create an actual Vested agreement – regardless of your location
- Whether you are developing a contract for a new relationship, or restructuring an existing agreement, this course is a must-have resource that is your roadmap to creating your own Vested Agreement



* Prerequisites for **Creating a Vested Agreement** class are:

Five Rules, Is Vested Right?, Getting Ready, and the Vested 3-Day Executive Education Course



Be working with a Vested Center of Excellence

The following page provides a course outline and learning objectives

We have had individuals and organizations that want to use the course for educational purposes only and do not intend to create a Vested Agreement. The course can be repeated at no additional cost for up to one year when the individual/organization is ready to complete an actual Vested Agreement.





What You Will Learn...

- The ***Creating a Vested Agreement*** course is designed to help you and your partner (e.g., customer, supplier, non-profit alliance partner) jointly develop a Vested Agreement
 - The course consists of Seven Course Modules, with one Module dedicated to each of the Five Rules
 - Each Module includes several short (20 minutes or less) “Topics” where you will learn how to put the Vested theory into practice



- The course includes a comprehensive Vested Toolkit[®] that accompanies each module; when completed – you will create the physical deliverables and contractual schedules of your own Vested Agreement
- Ideally, all partners involved will take this course as a joint “deal architect team” and complete the work jointly using the Vested Toolkit provided

Cost: Individual Seat License for \$3,500*



Implementation

402 – Certified Deal Architect Validation

- The UT Validation course is the capstone experience for individuals pursuing their Certified Deal Architect
- This course is a one-on-one distance learning course where CDA Candidates are paired with a UT Faculty mentor
- The faculty member will provide a comprehensive review of how well the CDA Candidate applied the Vested Five Rules/10 Contractual Elements in their contract.
- The UT Validation course is undertaken after the individual(s) pursuing their CDA have completed their Vested Agreement



The following page provides a course outline and learning objectives

Registering for the UT Validation course is a requirement for anyone wanting to become a Certified Deal Architect



Certified Deal Architect Eligibility

- Participants must take all of the Vested courses
- Participants must also demonstrate their competency of Vested methodology by submitting a project that shows they can effectively apply their skills to create a Vested agreement
- Validation typically occurs just prior to signing your agreement
- Upon validation and review by a faculty member participants will receive Executive Education credit for the University of Tennessee Certified Deal Architect Program¹



Cost: \$8,500*

**Team members working on the same project will be validated as a team. The first person is \$8,500 and additional team members are \$500 each. Must participate as a Core Team member and physically play an active effort in architecting the agreement / complete all deliverables.*

¹ Faculty Review Performed Remotely via Conference Calls



What Happens When You Are Done?



Participants Graduate!

All participants will receive Executive Education credit for the University of Tennessee Certified Deal Architect Program

*UT is an **IAOP** Academic Alliance Partner, and this class has been accepted for the Certified Outsourcing Professional Bridge Program and qualifies for COP credit.*

*UT is also an **NCMA** Education Partner.
Counts towards **APICS** recertification*

Getting Certified Is Expensive... Is It Worth It?



Darrin Browder

Strategist and Supplier
Relationship Manager
Dell, Inc.



- Darrin, working with a Vested Center of Excellence for coaching support, led Dell's efforts to restructure their relationship with GENCO for reverse logistics
- The deal took 5 months to restructure
- Results after the first six months
 - 32% reduction in Manufacturing cost per box
 - 57% reduction in scrap
 - Record high quality levels
 - 3x improvement in supplier margin
 - Dell won IACCM's award for innovation in contracting

*The Dell case study is featured in Chapter 12 of the book **Vested Outsourcing: Five Rules that will Transform Outsourcing** (second edition) and in the August/Sept issues of **Harvard Business Review***



Who are CDAs?

CDAs are typically leaders in their organization who specialize in crafting strategic partnerships or deals. Meet some of our CDAs!



President, Corporate Solutions Canada



VP Business Development



Vice President Business Partnerships



Director Operations Americas



Head of Legal and Ethics



Managing Partner



Partner



Sr Legal Counsel

Service Provider



Legal Counsel



Director, Business Process Outsourcing

Buyer



Senior Director Business Planning



Consultant

Attorney / Consultant



Principal



Global Finance Manager



Site Manager



Global Category Manager



Workplace Innovation Lead



Senior Sourcing Manager



Founder



Managing Director



What If You Are Not Ready For Vested?



- Not everyone is ready for Vested
- And that is OK
- We've create an online course that will help you lay a solid foundation for any relationship using the 5 Step **Getting to We** process as featured in Harvard Business Review
- The online course supplements to the **Getting to We** book. The course comes with a toolkit that will help you and you business partner to work through each of the 5 Getting to We steps for your relationship.
- You'll end the course with the beginning of a great relationship



Implementation

301 - Getting To We (online)

Not quite ready for Vested?

- Then this Getting to We course is right for you because it focuses on helping you establish a “What’s-In-It-For-We” (WIIFWe) mindset and lay the groundwork for a collaborative relationship with proven relational contracting practices
- The Getting to We online course provides organizations with a simple-to-follow, 5-step process and tools needed to embed relational contracting practices in any contract – big or small.
- The course consists of seven Course Modules, with one Module dedicated to each of the Five Steps of Relational Contracting
- Each Module includes several short (20 minutes or less) “Topics” where you will learn how to put the relational contracting theory into practice



The following page provides a course outline and learning objectives



What You Will Learn...

<i>Getting to We</i> <i>Relational Contracting in the New Economy</i>	
Introduction	An Introduction to <i>Getting to We</i>
Step 1	Lay the Foundation
Step 2	Co-create a Shared Vision
Step 3	Adopt Guiding Principles
Step 4	Align Expectations and Interests
Step 5	Stay Aligned
Conclusion	Sustaining Your Relationship

The Getting to We online course will help you:

- **Understand** why “getting to yes” is not always good enough
- **Learn an easy 5-step relational contracting process** for laying the foundation for highly collaborative relationships
- **Learn from real-world examples** of how companies have applied the Getting to We program, including examples of each step in practice
- Use a *RealPlay*® Toolkit to help you **complete key deliverables** for each step that will become the foundation for your relationship

Cost: Individual Seat License for \$475
Corporate/group licenses available



VESTED[®], Vested Outsourcing[®], the Vested business model, Vested concepts, and related intellectual property, evolved from a research project conducted by the University of Tennessee's College of Business Administration, are the property of Vested Outsourcing, Inc. and are subject to Terms of Use located at www.vestedway.com.termsofuse

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