



Contract Strategy and Claims Control Planning Course



AGILE LEADERS
Training Center

Contract Strategy and Claims Control Planning Course

Overview

Contract Strategy and Claims Control Planning Course is a five-day course that connects pre-award choices with post-award controls. Participants build a Contract Strategy and Claims Control Plan covering procurement sequencing, risk allocation, administration responsibilities, early-warning records, variation pathways, entitlement analysis, and claim decisions. The course treats contract planning and claims readiness as one control system rather than separate legal tasks. Agile Leaders Training Center presents this course as an applied bridge between commercial strategy and contract evidence.

Who Should Attend

- Contract managers responsible for planning, administration, and claim decisions
- Procurement professionals designing contracting routes and bid packages
- Project controls specialists connecting schedule and cost records to contract events
- Commercial managers evaluating variations, entitlement, and recovery positions
- Claims practitioners improving notices, evidence, and submission governance

The course assumes working knowledge of contracts and project delivery; it does not provide legal advice or focus on negotiation technique alone.

Departments and Industries

The course supports functions that coordinate contracting strategy, delivery controls, and claims management.

- Contracts, procurement, commercial, legal support, and supply chain
- Project controls, planning, cost management, and risk
- Construction, engineering, infrastructure, and facilities services
- Energy, manufacturing, transport, and logistics
- Technology, telecommunications, and outsourced services

Learning Objectives

By the end of this course, participants will be able to:



- Map business requirements into a contracting strategy and package sequence
- Analyze risk allocation against ownership, capability, and delivery conditions
- Design contract administration controls for notices, decisions, and records
- Apply variation control and early-warning methods to emerging events
- Evaluate entitlement using cause, effect, contract basis, and evidence
- Build a governed claim preparation and review pathway

Course Agenda

Day 1: Contract Planning and Delivery Strategy

- Business Requirement and Contract Objective Map
- Contracting Route Selection Matrix
- Procurement Package Sequencing Board
- Stakeholder Authority and Decision Map
- Contract Strategy Assumption Register

Day 2: Risk Allocation and Control Design

- Risk Ownership and Capability Matrix
- Commercial Exposure Allocation Method
- Contract Interface Responsibility Map
- Control Requirement Design Checklist
- Risk Allocation Decision Record

Day 3: Administration, Notices, and Evidence

- Contract Administration Responsibility Matrix
- Early-Warning Trigger and Escalation Map
- Notice Requirement Tracking Register
- Contemporaneous Evidence Index
- Decision and Correspondence Control Log

Day 4: Variations, Entitlement, and Claim Decisions

- Variation Identification and Classification Method
- Cause-and-Effect Analysis Chain
- Entitlement Assessment Worksheet
- Delay and Cost Evidence Map
- Claim Strength and Response Matrix



Day 5: Integrated Contract Strategy and Claims Control

- Exercise: Build a Contracting Route Selection Matrix
- Exercise: Test a Risk Allocation Decision Record
- Exercise: Assemble an Early-Warning Evidence File
- Exercise: Evaluate a Variation and Entitlement Position
- Capstone Exercise: Contract Strategy and Claims Control Plan

Practical Exercises

The course uses suggested activities to connect contract strategy with evidence and claim governance.

- Suggested activity: sequence procurement packages for an infrastructure delivery scenario.
- Suggested activity: allocate interface risk for a technology services contract.
- Suggested activity: test notice and record controls after an engineering variation.
- Suggested activity: evaluate cause, effect, entitlement, and evidence for a logistics disruption.

FAQs

How does contract strategy affect later claims management?

Contract strategy affects later claims management through package boundaries, risk ownership, authority, notice requirements, records, and decision pathways established before award.

What is included in contract administration planning?

Contract administration planning defines responsibilities, communication routes, notice tracking, decision records, variation controls, evidence ownership, escalation, and reporting.

How does early-warning control support claims readiness?

Early-warning control identifies events, assigns owners, records possible effects, preserves contemporaneous evidence, and prompts timely commercial and operational decisions.

What does entitlement analysis examine?

Entitlement analysis examines the contract basis, event chronology, causation, responsibility, compliance with procedural requirements, effect, and supporting evidence.

What will participants produce during the course?

Participants build a Contract Strategy and Claims Control Plan that joins contracting choices, risk allocation, administration controls, variation pathways, evidence, and claim review.



Conclusion

Participants leave with a Contract Strategy and Claims Control Plan supported by route-selection, risk-allocation, notice, evidence, variation, and entitlement tools. The work product helps teams align pre-award decisions with post-award control, preserve decision quality, and manage claims through a traceable governance pathway.



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