

CBRM®

Module 1

Course Introduction



Welcome to your Study Guide

This document is supplementary to the information available to you online, and should be used in conjunction with the videos, quizzes and exercises.

Study Guide Icons

	Tip	This will remind you of something you need to take note of, or give you some exam guidance.
	Definition	Key concept or term that you need to understand and remember.
	Role	Job title or responsibility.
	Purpose or Objective	For a process or activity.

IP and Copyright Information

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Text in "*italics and quotation marks*" is drawn from the CBRM® Body of Knowledge

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1. Introduction to CBRM

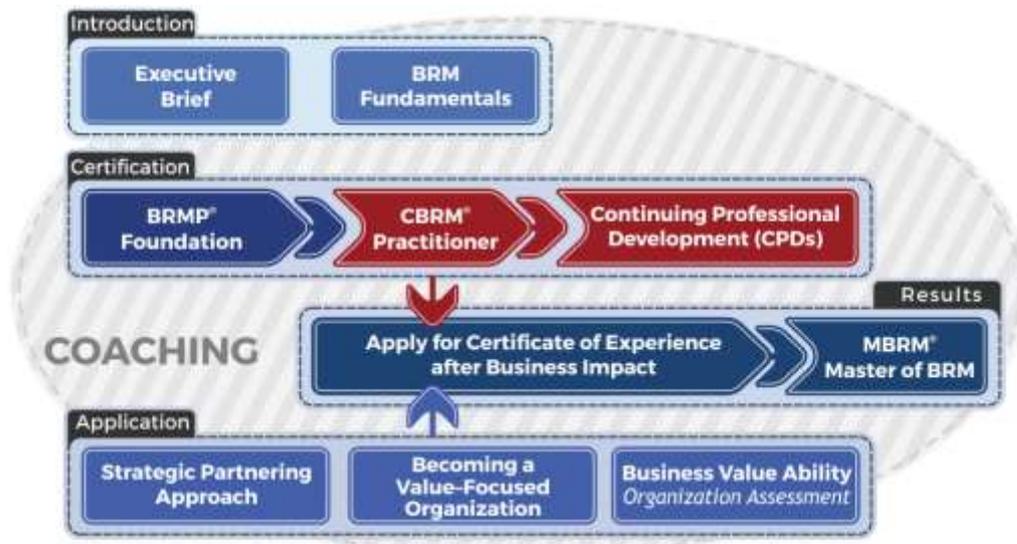
This module introduced the CBRM course with topics including:

- BRM Knowledge Path to Success
- BRM Role, Terminology and Capability Review
- CBRM® Toolkits
- Business Relationship Management Institute

Business Relationship Management is an art; the job demands subtlety and finesse, but the scenario-based exam also demands some precision.

	Hint	Engaging actively with the course materials and sharing experience of BRM and BRM techniques, as well as accessing the support of others through BRM Institute, helps the learning process.
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2. BRM Knowledge Path to Success



The Knowledge Path to Success illustrates progress on the learning path. The BRMP Foundation course is completed and this course can be viewed as a journey to become a CBRM practitioner. The paths that can be taken after this course are also visible, for example, continuing professional development or applying for a Certificate of Experience. The Continued Professional Development Plan for CBRMs is a vital part of keeping the CBRM certification up to date. The certification is granted for three years in which practitioners are required to complete professional development goals annually to further develop their skills in Business Relationship Management.

	Tip	The BRM Institute website provides more information about CBRM Certification maintenance requirements: https://brm.institute/cbrm-cpd-expectations/
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The CBRM's primary focus is on strategic business relationship management leveraged to drive business value, build strategic partnerships and evolve enterprise culture. A CBRM can influence their local communities, themselves, local businesses, and those around them through the knowledge gained from the course. This new-found knowledge and practice can be used to gain a Certificate of Experience which can be accessed through the following link:

<https://brm.institute/certificate-of-experience-certified-brm/>

3. BRM Role, Terminology and Capability Review

Every discipline has its own terminology or 'jargon', this is the same for BRM. Used properly, jargon can improve communication by removing ambiguity and reducing the scope for confusion and misunderstanding. This course referred to the role as Business Relationship Manager or BRM, different terms may be in use in other organizations. The BRM's client is known as the Business Partner and the providing organization is known in BRM as the Provider. Providers could be IT, Human Resources, Marketing, Finance and other organizations or departments.

The BRM Body of Knowledge gives the following formal definition of Provider:

	Provider	"...The term used to describe the organization that the Business Relationship Manager represents to their Business Partner"
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The Business Partner is the role in the organization that the Business Relationship Manager works with to achieve the objectives of Business Relationship Management. The following is a formal definition of Business Partner:

	Business Partner	"... The term used to refer to the individual that the Business Relationship Manager represents on behalf of the Provider organization"
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The BRM Body of Knowledge provides a formal definition of the Business Relationship Manager:

	Business Relationship Manager	"...a role that serves between the strategic interface that is the Provider and one or more Business Partners to stimulate, surface and shape business demand for the Provider's products and ensure that the potential business value from those products and services is captured, realized, optimized and recognized"
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BRM can be viewed from three perspectives, as a role, as a discipline and as an organizational capability:

- BRM as a role refers to a set of duties, responsibilities and authorities that will be assigned to a person or team
- BRM as a discipline describes the skills, capabilities and knowledge that are used to do Business Relationship Management

- BRM as an organizational capability refers to the ability of a provider to be effective in shaping and channelling demand to the highest value opportunities

The following graphic is a visual representation of the House of BRM:

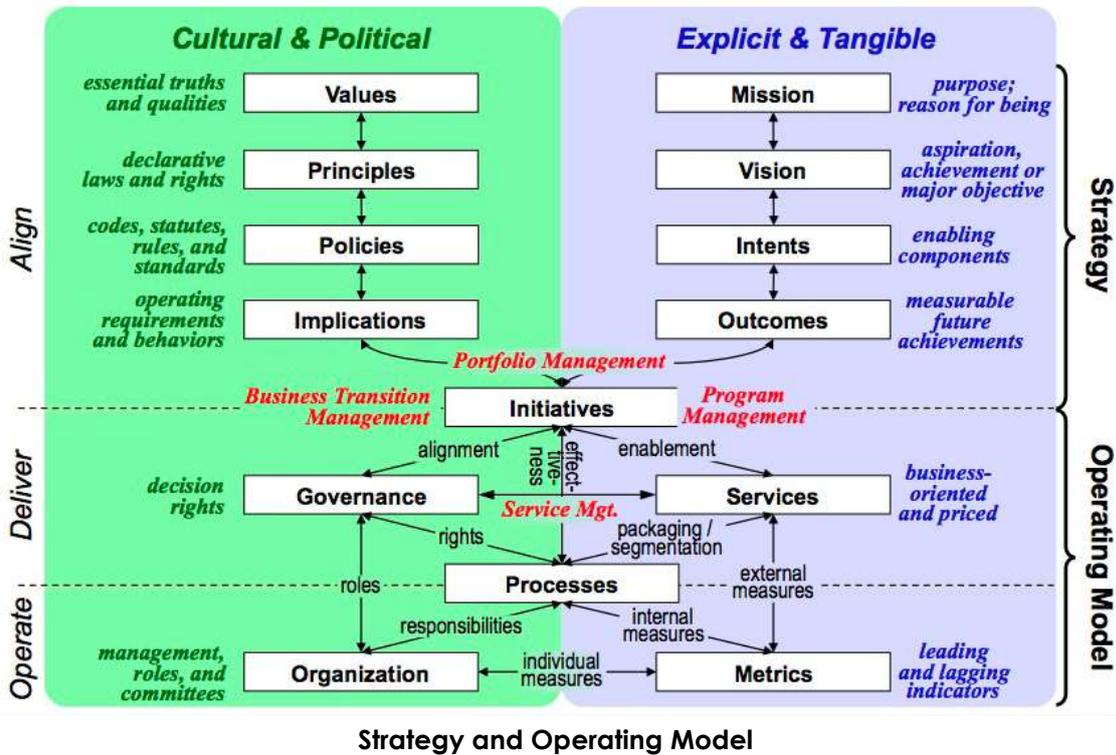


House of BRM

At the bottom are the competencies needed for effective BRM and for ensuring that it delivers value to both the Provider organization and its Business Partners. The competencies provide the foundation on which BRM is built. The pillars define the BRM space in terms of BRM Core Disciplines: Demand Shaping, Exploring, Servicing and Value Harvesting. The roof of the House of BRM protects Business Relationship Management as a key aspect of Provider capability. It does this by ensuring clarity around the role, discipline, and organizational capability of Business Relationship Management in the context of the Provider Strategy and Operating Model.

	<p>Operating Model</p>	<p>An Operating Model is an abstract representation for how an organization utilizes its resources to create value.</p>
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The following diagram illustrates an operating model and the strategy it supports:



The upper part of the diagram, labelled Strategy, shows the various components that together define the strategy of the Provider. The lower part of the diagram shows the components of the Operating Model and how they interact.

Business Relationship Management is in part science, but a large part of it is also art. The frameworks and techniques presented on the course should be used with creativity and finesse. Unlike operational process-based subjects such as ITIL and COBIT, BRM emphasizes soft skills, so the frameworks, techniques and models introduced in the CBRM training should be used with care and adjusted to suit the context. A hand drawn maturity curve has far more impact and will drive more discussion and insight than a fancy PowerPoint slide! Frameworks should be presented from the perspective of the stakeholders with a consideration of what's in it for them, or WIIFM. The BRM needs to make these frameworks and techniques their own and fit them into their enterprise context and vocabulary. It is important to consider where to take Business Partners and Provider stakeholders but also to meet them where they are, building on "the known".

4. CBRM® Toolkits

Toolkits are an important resource that can be accessed during study. Whereas BRMP® training and certification covered the “what” of BRM, CBRM® addresses the “how”, and is built around 3 major CBRM toolkits. These are:

1. Assessing BRM Context

Technique
Business Demand Maturity Assessment
Assessing Business Relationship Maturity
Assessing Capability Maturity
Assessing BRM Competency

2. Developing Strategic Relationships

Technique
Strategic Relationship Management Planning
Strategic Relationship Management Process
Hierarchy of Needs and Expectations
Diagnosing Relationship Quality
Relationship Value Mapping
Relationship Improvement Planning
Relationship Strategy on a Page
Cultivating Relationship Networks
Identifying Relationships Needing Improvement and the Means to Improve Them

3. Optimizing Business Value

Technique
Value Management Planning
Business Strategy on a Page
Scenario Planning

Business Capability Roadmapping
Benefits Dependency Networking
Stakeholder Mapping
Transition Network Analysis
Stakeholder Analysis Charting
Planning Business Transition Management
Business Value Optimization
Creating a Mission Statement
Creating a Vision Statement
Developing Principles
Assessing Business Transition Network Members
Assessing Transition Portfolio Capacity
Linking Business Drivers with Technology
Building a Business Case for BRM

There are also general CBRM Tools:

Technique
Repairing Broken Business Partner Relationships
RACI Charting
Value Mapping
Documenting Ideas
Portfolio Balancing
Portfolio Classification
Converting Business Drivers into Transition Drivers
Expressing a Unique Value Proposition
Organizing and Deploying BRM Capability
Strategic Sourcing

Business Capability Management
BRM Performance Measurement
Cultivating Business Innovation
Ideation
Using Real Options for Business Investment Decisions
Portfolio Management Process and Techniques
Shaping the Business Partner Experience
Appreciative Inquiry
BRM Communications Management
Navigating Organizational Politics
Issue Clarification
Improving Personal Influence

There are a variety of problem solving, quality improvement and continuous improvement methodologies available. These are often embraced more strongly by Business Partner organizations than by Providers, so knowing what methods are in use by Business Partners can be useful. Some examples of these include:

- Lean Six Sigma
- DMAIC, which means Define, Measure, Analyze, Improve and Control
- Voice of the Customer (VOC)
- Quality Function Deployment (QFD)
- Shift Left
- SIAM
- Kanban

	Tip	It's good relationship development practice to be using the quality and continuous improvement tools that are used by the BRM's Business Partner.
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5 Business Relationship Management Institute

The Business Relationship Management Institute was incorporated in March 2013 as a 501(c)(6) non-profit corporation.

	BRM Institute's Mission	"To inspire, promote, and develop excellence in Business Relationship Management across the globe, leading to outstanding business value for organizations and professional fulfilment for every individual member of the BRM community"
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To fulfil its mission BRM Institute:

1. Builds, validates, and advances knowledge and leading practices for all aspects of BRM capability, discipline, and role through the BRMiBOK™
2. Through membership, provides a platform for BRMs to share experiences, exchange ideas, support professional growth and enhance career opportunities
3. Establishes and facilitates BRM education, professional training and certification programs
4. Develops enterprise awareness as to how BRM capability improves business performance
5. Provides opportunities for participation in the development and promotion of the BRM profession
6. Conducts research and builds partnerships to advance the BRM discipline and practice

Joining the global community at BRM Institute as a professional member gives access to a growing collection of useful concepts, models, frameworks, techniques and many more benefits through the following link:

<https://brm.institute/welcome/>

There is also a 50% discount for joining offered to students taking the CBRM course.

Members can contact BRM Institute and access the BRM Interactive Body of Knowledge (BRMiBOK™). The BRM online community can be accessed through their social media pages on twitter, Facebook and LinkedIn:

<https://twitter.com/BRMInstitute>

<https://www.linkedin.com/in/brm-institute-8144b093/>

<https://www.facebook.com/BRMInstitute/>