

## **BATES Associate Network Concept**

Bates Project Management, Inc. (BATES) is a project management consulting and services company that delivers professional project management services to its clients through a network of Associates. To fulfill the growing needs of companies for qualified and experienced project managers—and to further penetrate existing markets—Bates is now increasing its associate network throughout North America. Specifically, we are expanding our markets in Ottawa/Eastern Ontario, the Greater Toronto Area, the Province of Quebec and the Western and Pacific Regions, as well as South-western Ontario and the Atlantic Provinces. The BATES Associate philosophy is inclusive and beneficial for both the Associates and the company. Associates become part of the reputable Bates team without having to become full-time employees.

### **The Associate benefits include:**

- The ability to be independent and earn their potential while being part of a larger team.
- The BATES Associate training and conference program is subsidized by BATES reducing the cost of the Associate's own management development program.
- The central marketing program of BATES provides a much higher probability of gaining client work at good rates and sales commissions than when working on their own.
- The opportunity to work and communicate professionally with other highly experienced professionals within the BATES network. Communications within the BATES network team is both face to face and via telecommunications hook-up, through Internet for E-mail and teleconferencing. This provides the feeling of being part of and working with a cohesive team.
- Access to a growing body of knowledge in different areas of project management, which is maintained centrally by BATES, based on client work results and research being conducted by the company.
- The associate retains the freedom to conduct business outside the BATES umbrella, be it other types of consulting, such as information systems or engineering, or any other business ventures. While BATES would prefer that all project management consulting and services work be provided under the BATES umbrella, an associate has the option of providing services outside the BATES umbrella, provided they do not overtly compete with BATES on clients BATES has identified.
- All Associates have the opportunity to participate in the ownership and management of the company. See more detail in the "Levels of Officer/Owners and Associates" for further explanation.

### **BATES' benefits include:**

- The ability to have access to a large pool of highly experienced and professional consultants from various professional/technical fields, who are loyal to the BATES philosophy, approach and team. This is a tremendous asset for (1) performing client work and (2) developing new and enhanced products for our market niche.
- A wide sales network with every Associate as a potential salesperson.

**Levels of Officer/Owners and Associates.** The BATES Associate network has levels of Officer/Owners and Associates.

**Officer/Owners.** As the company grows, we are establishing two levels of officer/owners, corporate and regional, which will provide their services to the company. All officer/owners are remunerated based on performance using several methods: management fees, marketing commissions, client services, corporate product development, profit sharing and dividends. All officer/owners buy into the company with minimum amounts established by their level and position.

- **Senior Officer/Owners.** Senior officer/owners are the senior executives of the company and include the president, a corporate marketing vice president and the regional senior vice presidents. They focus primarily on corporate and regional direction, financial and marketing management. Senior officer/owners make up the corporate board of directors.
- **Officer/Owners.** Officer/Owners can fulfill corporate or regional management positions. Examples are:
  - Regional vice president responsible for market and client service direction. Sectors are established by each region and could be by geographical or industry sector.
  - Industry sector or project management competency leaders on the corporate management team. These officer/owners develop and recommend process and policy for their sector or competency areas.

**Associates.** Associates are independent consultants who have accepted the guidelines and conditions for becoming BATES associates. These associates normally have significant experience in both a particular professional or technical area plus project management experience. Associates are remunerated by performance, including client services fees, marketing commission, BATES product development and for shareholders, dividends when declared. Associates usually work within a particular region, but should be available for assignment to client projects from other regions.

- **Project Management Consulting Associates.** Individuals whose experience encompasses both a professional or technical background plus project management experience. There are two levels of PM associates:
  - **Senior Associates.** Individuals who have significant experience in management and project management backgrounds and usually have extensive consulting experience when they join the network. In BATES, they work on major client contracts and often are the BATES project manager on the contract.
  - **Associates.** Individuals who have a good background in management and project management when they join the network. They are available for client work, usually as a team member working under a Senior Associate or Officer/Owner.
- **Project Support Associates.** These associates provide project administrative support in direct management services contracts to either BATES or client project managers. This work includes schedulers, cost analysts, clerks, and etc.
- **Specialty Associates.** Individuals who are professional consultants in areas other than project management whose specialty area complements the BATES consulting practice. They are available for

client work, usually as team members working under a Senior Associate or Officer/Owner. Examples are Quality assurance and manufacturing process.

- Marketing Associates. Individuals who specialize in identifying and selling training seminars, who undertake to represent BATES in their geographic area. They do not work on client projects.

All individuals who teach BATES seminars must be Certified Instructors. Currently, all Officer/Owners and some of the Senior Associates are Certified Instructors. There are currently seven certified instructors in the network.

**How to become a BATES Associate**. To become an Associate of the BATES Network, an individual must:

- Be accepted by BATES as a potential associate. The initial screening uses the BATES Associate Profile to assess the individual qualifications and characteristics.
- Participate in the BATES Initial Associate Training Program, which provides the candidate with a background of BATES and its products with emphasis on the Bates Project Management Methodology (PMM).
- Accept the BATES Associate Network Guidelines for participating in the BATES network.
- Accept and work in accordance with the Project Management institute's (PMI) "Code of Ethics for the Project Management Professional" (attached). Membership in PMI and certification as a Project Management Professional (PMP) is encouraged.
- Must agree not to work in client assignments that are in conflict of interest with BATES.
- Be willing to participate in the BATES Development and Conference Program.
- Be willing to accept the small financial cost coverage of:

the BATES Initial Associate Training Program,

the BATES Development and Conference Program and

the BATES Initial Associate Training Program is defined to include the standard Bates Project Management Seminar Workshop. (4 Days).

The cost to an Associate for this training program will be \$500.

During the entry assessment, each candidate will be evaluated on presentation skills and sales skills to determine if those skills need enhancement. If so, the associate is expected to obtain training in these areas as part of their own career development program.

**How to become a Certified Instructor.** For Senior Associates who desire to become Certified Instructors and are accepted by BATES for that program, the process is as follows:

- The candidate undergoes an intensive screening which includes an interview with Bill Bates to determine their attitude towards management instruction, their ability to conduct seminars and their basic acceptance of the PMM. If accepted, they then proceed with the following steps.
- They attend three more sessions of the Bates Project Management Seminar/Workshop.
- They complete a project plan for a new project utilizing the PMM by hand without any computer assistance and present that plan to an officer of BATES, who will usually be Bill Bates in a formal presentation.
- They attend a five-day, two level Train-The-Trainer course. Level one is a basic training presentation skills and level two is practice teaching of selected BATES seminar materials to a live audience.
- Finally, they team teach in one or two seminars with a Certified Instructor and are critiqued. During these seminars they should expect to teach a minimum of forty percent of the seminar and could teach more at the discretion of the assigned Certified Instructor.