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# Our trainings

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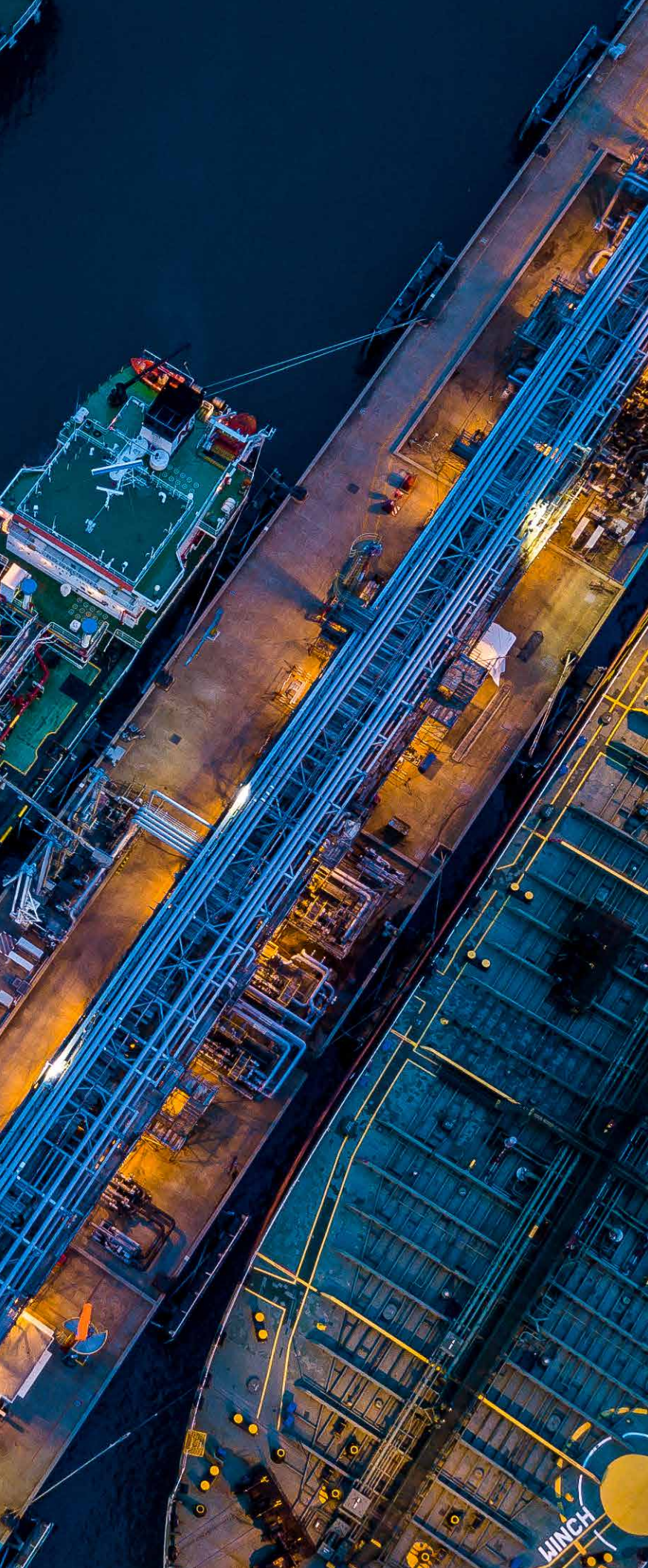
*Building on 50 years on international development experience, DAI offers a comprehensive catalogue of online trainings.*

**Our trainings** are distinguished by content that is steeped in practical applications of development practices and topics. We draw on more than 2,000 long-term projects and development assignments completed across 150 countries to advance trainees' skills.

**Our expert trainers** are development practitioners themselves and rely on data and analytics to craft the course material using real case studies to apply theory to practice.

**Our courses** can be customized to include specific languages, countries (including geographies within a country), and development contexts to optimize the application of the material to current challenges.





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# Local Content Training

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Since mid-2015, the topic of local content has moved center stage, and with it the need for adaptive professionals to implement rapidly evolving local content compliance regimes and deliver tangible local benefits as a balance to globalization. Today, in upending the supply chain world order, the COVID-19 pandemic is redefining how we source goods and labor. Companies and governments should not wait for this current pandemic to run its course before launching initiatives to reimagine their use of local content—and they certainly shouldn't wait for the next global shock to force their hand.

The following training modules have been developed from DAI's globally recognized Local Content Master Class, which has been operating for more than 10 years and trained more than 500 practitioners globally. The Master Class is accredited by the British Accreditation Council.



## Past Participants Include:

- National and international oil, gas, and mining companies
- National and international companies involved in other capital-intensive sectors such as infrastructure, transportation, renewable energy, utilities, and water management
- Government policy-making authorities
- Host-country regulatory agencies
- International and large-scale domestic contractors/suppliers
- Local supplier business and trade associations
- Specialists from international development agencies and development finance institutions

## Details

- Can be offered in-person on request
- Customizable to a particular jurisdiction, project, host government, or company

***“Certainly the prime local content course in the market. Highly recommended.”***

*Local Content Manager,  
international oil field services  
company*

## Master Trainers



**Zachary Kaplan**

Vice President, Sustainable  
Business Group



**Dr. Michael Warner**

Senior Advisor, Sustainable  
Business Group



**Dorival Bettencourt**

Director, Sustainable  
Business Group

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## Offered Languages

English, Spanish, Portuguese, and French

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## Duration

One day per module

## Module 01

# Local Content Strategy and Policy Training

### Development Context

From Indonesia to Nigeria, governments are rethinking local content. Now, more than ever, countries and companies are trying to identify effective measures to drive local sustainable development when sourcing or making new investments. This challenge is particularly hard when seeking to find the right balance between promoting the use of local enterprises and workforces without compromising other critical factors such as cost competitiveness, quality, safety, and schedule. Sourcing locally and using new private sector investments to catalyze local economic growth—local and national content—is growing in importance across all sectors of the global economy.

This course takes practitioners from both the private and public sectors through the theory, definition, and implementation of appropriate and well-balanced local and national content policies, at the government, corporate, or project level. It examines various local content laws, regulations, and policies around the world and assesses their effectiveness. It also trains participants on alternative private sector approaches, at the corporate or project level, to developing successful local and national content development policies and plans.

### Core topics covered

- Local/national content origins, economic theory, and definitions
- Global political economy of local content
- Experiences with local/national content—what has worked and what has not
- Principles and methodology for determining a fit-for-purpose local content strategy and/or policy development approach
- Core elements of a robust local content strategy and/or policy
- International trade implications
- Methodology for developing a local content strategy and/or policy
- Case studies with analysis of local content laws, regulations, and policies

## Module 02

# Local Content Forecasting, Plans, and Procurement Tactics

***“The course was beyond my expectations. I thought I was coming for validation, but actually learnt many new insights.”***

*Head of Strategy and Policy Development, Nigerian  
Content Development Monitoring Board*

### **Development Context**

This module prepares participants to forecast local content scenarios linked to the procurement of goods and services and the employment of workforces for large projects. Participants learn the latest practices in determining how to measure local supply chain capacity as well as skill levels and qualifications in the local workforce to inform their local engagement strategies. They also learn how to translate results of such forecasts and scenario analyses into local content plans that reflect how local economic impact can be achieved most effectively. Finally, participants gain exposure to new procurement, contract tendering, and evaluation techniques that reposition local content as a core element in sourcing goods and services competitively.

### **Core topics covered**

- Understanding of supply and demand for local content
- Local content forecasting methodologies and mapping the local industrial base (enterprises and workforce)
- Developing a local content plan
- Contracting and tendering strategies
- Procurement procedures
- Ethical considerations

## Module 03

# Local Content Reporting, Impact Measurement, and Communications

### Development Context

Laws, regulations, and policies, as well as local stakeholder expectations, have elevated the importance of local content reporting. Concurrently, the growing importance of environmental, social, and governance standards and corporate commitments to the Sustainable Development Goals mean companies and governments must use data and analytics to measure the economic impact generated through local procurement and local employment in ongoing and new investments across all sectors. This module trains practitioners on the methods for selecting the right metrics and key performance indicators (KPI); establishing the right data collection and analysis processes and standards; and “telling the story.” Core to this module is becoming comfortable with identifying the right metrics from which practitioners can evaluate impact correctly and use the analytical results to improve on local content reporting and performance. Participants gain an understanding of the expectations and interests of various stakeholder groups and how to create engagement and communication strategies that use empirical evidence to spur collaboration and drive improvements in stakeholder relations and local content performance over time.

### Core topics covered

- Data governance and collection systems, processes, and methods
- Selecting the right metrics, KPIs, and impact measures
- Understanding and interpreting data
- Communicating results and engaging key stakeholders
- Identifying the right digital solutions to streamline reporting



## Module 04

# Local Content Investments: Supplier and Workforce Development

***“Well organized, good content, excellent materials... created an atmosphere of openness, teamwork, and discussion.”***

*Project Director, TCO Kazakhstan*



### Development Context

Investing in local content can take many forms. The past 15 years have seen major advances in the ways companies and governments invest in building the capacity of local SMEs and workers in a way that is economically viable and sustainable. This module teaches participants how to use data and analytics to structure capacity-building and local content programs that are commercially effective and economically beneficial. Participants learn how to diagnose gaps in the local supply chain—from enterprises to individual workers—and design and implement programs to address these gaps. Key to this approach is stakeholder engagement and sustainability planning.

### Core topics covered

- Supplier evaluation and gap assessment methodology
- Using online registration and pre-qualification portals and tools
- Assessing local workforce skills and qualifications
- Measuring local training capacity of technical, vocational, and higher education institutions
- Designing and implementing local content—supplier and workforce—development programs
- Calculating the net present value (NPV) of an investment in strengthening local content

A photograph of two men standing in a field of young green plants. The man on the left, wearing a red and blue plaid shirt over a black t-shirt and khaki pants, is pointing towards the plants. The man on the right, wearing a blue jacket over a black and white striped shirt and blue pants, is holding a tablet and looking at it. The background shows a fence and some buildings under a clear sky.

# Small Business Recovery and Resilience Trainings

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Micro, small, and medium enterprises (MSMEs) comprise up to 95 percent of the world's businesses and employ up to 60 percent of the workforce. However, MSMEs are more vulnerable to shocks than their larger counterparts, whether those shocks are economic, health-related, climatic, political, or otherwise.

DAI's small business recovery and resilience trainings take businesses and startups through critical business tools and techniques to help stabilize, strengthen, and pivot their companies. The modules are designed to:

- Develop stabilization plans for business continuity related to operations and workforce
- Manage cash flow, calculate runway, and develop a short-term financial strategy
- Analyze customer demand and pivot business model to seize current opportunities
- Adjust sales approach to current environment (such as leveraging e-commerce)
- Shore up supply chain to mitigate further risk

DAI's small business recovery and resilience trainings can be delivered either as individual, targeted modules, or as the holistic two-day MSME Resilience System.



## Past Participants Include:

- **COMPANIES:** Support local suppliers, redirect corporate social responsibility (CSR) funds to effective training for sustainable growth
- **GOVERNMENTS:** Accelerate MSME sector resilience as part of larger economic recovery efforts
- **DONORS:** Adapt economic growth projects to current needs and realities
- **FINANCIAL INSTITUTIONS:** Reduce MSME portfolio risk and nonperforming loans
- **INDUSTRY ASSOCIATIONS:** Develop the resilience of member

## Details

- Can be offered in-person on request
- Customizable to a particular jurisdiction, project, host government, or company

***“Supporting and facilitating MSME training and development is critical to help businesses adapt to the market’s new landscape and to drive economic recovery from the COVID-19 pandemic.”***

*Dipika Chawla, Principal  
Entrepreneurship Specialist, DAI*

## Master Trainers

from DAI’s Sustainable Business Group



**Amanda Ryan**  
Senior Analyst



**Alyssa Menz**  
Senior Analyst



**Dipika Chawla**  
Manager



**Zaki Raheem**  
Senior Manager



**Dorival Bettencourt**  
Director



**Mobola Sandey**  
Manager

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## Offered Languages

English, Spanish, French, Italian,  
Portuguese, Tamil, and Hindi

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## Duration

Four hours or full day





## Module 01

# Business Pivoting

### Development Context

While MSMEs' size is partly what makes them vulnerable to disruptions, it is also what makes them strong and adaptable. When MSMEs use this to their advantage they can more readily adjust to changing environments and incorporate flexibility into their business models.

This training provides a guide for MSMEs to quickly adapt their businesses to ever-fluctuating business conditions. Drawing on tools and approaches tested with entrepreneurs around the world, we guide MSMEs through understanding the six types of pivots, examining their business models, and identifying opportunities for adapting to the new environment. Interactive exercises and tools help MSMEs take a critical look at their customers, products, channels, cost structures, partnerships, and more.

### Core topics covered

- Recognize the six types of pivots, including product pivot, channel pivot, customer segment pivot, and more
- Create a visual representation of the business model that can be updated as the business evolves
- Analyze how external constraints are affecting different parts of the business and what MSMEs can do to adapt
- Identify new opportunities to maintain and grow business during difficult periods

## Module 02

# Supply Chain Resilience

### Development Context

Recent events, including the COVID-19 pandemic, have demonstrated the significant impact of supply chain disruptions on MSMEs. Disruptions lead businesses to slow down production, manufacturing, and service provision, with knock-on effects across their businesses, as well as direct and indirect impacts to the customers and societies they serve.

This training integrates real-life examples to teach concepts and tools that can help MSMEs respond to and prepare for unexpected supply chain disruptions. Focus areas include supplier, logistics, and inventory management, supply chain planning and control, and client and supplier communication. We use interactive exercises designed to help MSMEs integrate supply chain resilience into their everyday business considerations.

### Core topics covered

- What is supply chain management?
- Learn tools and concepts to prepare for market disruptions
- Develop scheduling, market monitoring, systems planning, and control techniques
- Learn best practices and techniques for communication with clients and suppliers



## Module 03

# Cash and Cost Management

### Development Context

Most MSMEs have less than two months of runway to survive under adverse conditions. For the smallest enterprises, the runway is even shorter. These firms are drastically affected by shocks and changes in market conditions that have the potential to lead to large-scale social interruption, decreased consumer spending, and disruptions in supply chains and labor force.

This training provides foundational crisis-response financial management guidance and advice for MSMEs. Using interactive financial planning exercises, we guide MSMEs through various tools for developing their short-term financial strategy, including calculating the business's financial runway, creating a financial dashboard, and managing cash inflows and outflows. We draw on salient and targeted examples to provide practical guidance for post-crisis financial planning, including revisiting their business model and negotiating for financial support.

### Core topics covered

- Develop tools for creating a short-term financial strategy
- Checklist of cash, liquidity, and cost management tactics and guidance
- Calculate your company's runway
- Support with basic inventory management and pricing
- Plan for business financing post-crisis
- Tips for (re)negotiating with banks during crisis
- Cash-flow planning for business continuity after shocks



## Module 04

# eCommerce

### Development Context

MSMEs across sectors are increasingly transacting business online to better connect with customers, suppliers, and partners. Indeed, those who successfully leverage eCommerce are able to expand their access to markets near and far; studies show that MSMEs which use eCommerce are five times more likely to export their goods and services and are typically more productive and influential in the development of successful communities (MSMEs and E-Commerce, International Chamber of Commerce, 2016).

This module will train MSMEs on eCommerce strategy, tools, platforms, and best practices. MSMEs will learn how to integrate eCommerce into their business or enhance existing processes they may have. It will also provide guidelines on how to handle supply chains and logistics relating to eCommerce, as well as how to use digital marketing to fully realize the benefits of eCommerce.

### Core topics covered

- Introduction to eCommerce
- Understand technical and strategic options
- eCommerce and your supply chain
- Engage with industry best practices
- Online marketing techniques
- Primer on ethical and legal issues

# Lead Trainers



*Our expert trainers are development practitioners themselves and rely on data and analytics to craft the course material using real case studies to apply theory to practice.*

## Zachary Kaplan

Vice President, Sustainable Business Group

Zachary Kaplan has more than 10 years' experience in the extractives industry, focusing on local content and policy, and leads activities related to local content, corporate social investment, and supplier development.

- Technical Advisor to local content supplier development programs worldwide.
- Assesses local supplier capacity for upgrade to enter global supply chains and facilitates foreign direct investments via joint ventures
- Key architect behind the development of DAI's proprietary local content methodologies and tools currently deployed across the globe
- Spearheaded a Local Content Regime Analysis in Ghana, Nigeria, Brazil, Trinidad and Tobago, Tanzania, Papua New Guinea, and Uganda, to assess the impacts of local content regimes

## Dorival Bettencourt

Director, Sustainable Business Group

Dorival Bettencourt has more than 10 years' experience in oil and gas investment, with technical expertise in local content policy and implementation, and champions supplier development for oil and gas clients around the world.

- Leads and oversees industrial baseline assessments for major oil and gas investments globally
- Designs and implements local content stakeholder engagement strategies across DAI's portfolio
- Extractive Industry Lead for U.S. Agency for International Development-funded private sector development and competitiveness program in Mozambique



## Dipika Chawla

Manager, Sustainable Business Group

Dipika Chawla is an entrepreneurship specialist with more than 10 years' experience in sustainable economic growth and MSME development.

- Leads international and interdisciplinary teams to design and deliver entrepreneurship and MSME development programs
- Experienced trainer in product design, business model development, pivoting, organizational management, and pitching to investors
- Designs and manages programs for business plan and innovation competitions, technology incubators and business accelerators, and entrepreneurship ecosystem strengthening
- Team Lead of the technical team supporting implementation of Kosmos Innovation Center, a regional entrepreneurship program in West Africa

## Zaki Raheem

Senior Manager, Sustainable Business Group

Zaki Raheem has 18 years' experience as an MSME development specialist designing, advising, mentoring, and managing entrepreneurship, enterprise development, value chain development, and financial inclusion programs.

- Facilitates in-person and virtual workshops for entrepreneurs and small businesses; hosts business plan competitions, startup boot camps, innovation challenges, and pitch events; designs and facilitates training-of-trainers for incubators
- Technical Director for the global advisory team with Shell LiveWIRE, a flagship entrepreneurship program supporting a global network of accelerator and pre-accelerator programs
- Adjunct Professor at Columbia University's School of International and Public Affairs, where he teaches a graduate-level MSME development class



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