BLACKBIRD FOR TRAINING

Advanced Claims & Variations Management

20 – 24 September 2027
Kuala Lumpur (Malaysia)

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Introduction

The Advanced Claims & Variations Management course is designed to strengthen the ability to manage contractual claims and project variations with a structured, evidence-based, and commercially sound approach.

Major projects, especially in construction, infrastructure, energy, engineering, and capital works, often face changes in scope, delays, disruption, site conditions, employer instructions, design changes, and schedule impacts. When these events are not managed properly, variations and claims can quickly turn into disputes that affect project cost, time, relationships, and overall delivery performance.

This course provides a practical framework for managing claims and variations from the moment an event occurs through to notification, evidence collection, delay analysis, cost assessment, claim preparation, negotiation, and settlement. The content is aligned with principles commonly reflected in international contract forms, including FIDIC-based practices, while remaining focused on claims and variations management rather than FIDIC training.

The five-day program follows a clear progression. It begins with the contractual foundations of claims and variations, then moves into notices, records, evidence, delay analysis, financial evaluation, claim preparation, negotiation, and settlement. This structure helps participants protect contractual rights, reduce dispute exposure, and improve the quality of claims management across the project lifecycle.

Course Objectives

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

- Understand the contractual foundations of claims and variations management.
- Distinguish between variations, claims, disputes, and contractual entitlements.
- Analyze contract clauses related to changes, delay, extension of time, compensation, and notices.
- Understand notice requirements and the impact of late or weak notifications.
- Prepare structured records and supporting evidence for claims.
- Assess the impact of variations on time, cost, resources, and project performance.
- Analyze delay and disruption events and link them to contractual responsibility.
- Prepare extension of time claims using a clear and defensible methodology.
- Prepare cost claims related to variations, delay, disruption, and prolongation.
- Review claims submitted by contractors, consultants, subcontractors, or suppliers.
- Build a complete claim file supported by facts, records, analysis, and contractual reasoning.
- Strengthen negotiation and settlement skills before escalation into formal disputes.
- Reduce claim and dispute risks through early management of variations.
- Develop an internal mechanism for tracking claims and variations throughout the project lifecycle.

Course Outlines

Day 1: Contractual Foundations of Claims and Variations

- Understanding the nature of claims and variations in engineering and construction projects.
- Differentiating between variation orders, claims, disputes, and contract amendments.
- Reviewing the relationship between scope of work, time schedule, price, and contractual responsibilities.
- Understanding the contractual roles of the employer, contractor, consultant, and project manager.
- Analyzing clauses related to variations, delay, compensation, notices, instructions, and determinations.
- Connecting claims management with the logic of internationally used contract forms, including FIDIC-aligned practices.
- Identifying events that may give rise to extension of time, additional cost, or contractual relief.
- Understanding how weak contract administration can lead to claims and disputes.
- Case discussion on claims arising from scope changes, additional instructions, and design revisions.
- Practical exercise on identifying the contractual basis for a potential claim.

Day 2: Notices, Records, and Evidence Building

- Understanding the role of contractual notices in protecting entitlement.
- Identifying when notices should be issued and what information they should include.
- Analyzing the consequences of late, incomplete, or poorly drafted notices.
- Preparing professional contractual correspondence that supports the project position.
- Identifying the types of records required to support claims and variations.
- Organizing site records, daily reports, instructions, photographs, meeting minutes, resource records, and progress updates.
- Building an evidence file that links the event, impact, responsibility, and outcome.
- Distinguishing between technical, time-related, financial, and contractual evidence.
- Reviewing common documentation mistakes that weaken claims.
- Practical exercise on drafting a claim notice and preparing an initial evidence register.

Day 3: Delay Analysis and Extension of Time Claims

- Understanding the main types of delay in projects and their effect on claims.
- Distinguishing between critical and non-critical delays.
- Analyzing the relationship between the baseline schedule and updated schedules.
- Identifying the critical path and evaluating the impact of variations on project completion.
- Reviewing delay events caused by the employer, contractor, external conditions, or concurrent factors.
- Understanding extension of time principles and linking them to facts and project records.
- Preparing a reviewable delay analysis methodology.
- Evaluating disruption and productivity loss linked to project progress.
- Reviewing extension of time claims in terms of methodology, evidence, and conclusions.
- Practical exercise on analyzing a delay event and preparing an extension of time summary.

Day 4: Financial Impact Evaluation and Claim Preparation

- Understanding the main types of additional costs arising from variations, delay, disruption, and prolongation.
- Analyzing labor, equipment, materials, site overheads, head office overheads, and indirect costs.
- Assessing the cost impact of extended project duration.
- Distinguishing between direct compensation, indirect losses, and disruption-related costs.
- Preparing a methodology for calculating the financial impact of a claim.
- Linking claimed costs to the contractual event and supporting evidence.
- Reviewing claims related to new rates, revised quantities, and changed work conditions.
- Analyzing productivity loss and execution-related claims.
- Building a complete claim structure covering facts, contractual basis, analysis, entitlement, and claimed amount.
- Practical exercise on preparing a concise financial claim supported by documents.

Day 5: Claim Review, Negotiation, and Settlement

- Reviewing claim quality in terms of contractual basis, facts, evidence, analysis, and presentation.
- Assessing strengths and weaknesses before negotiation.
- Preparing a professional response to claims submitted by another party.
- Understanding settlement approaches before escalation into formal dispute procedures.
- Managing claims and variations negotiation meetings.
- Using contractual, financial, and time-related analysis to support negotiation positions.
- Handling disagreements over responsibility, time impact, cost entitlement, and scope.
- Preparing settlement records, agreements, and claim closure documentation.
- Developing a claims and variations register for open, pending, negotiated, and closed matters.
- Final application on reviewing a full claim file and presenting settlement recommendations.

Why Attend this Course: Wins & Losses!

- Build stronger capability in claims and variations management.
- Improve understanding of contractual clauses related to delay, compensation, and changes.
- Reduce loss of entitlement caused by weak or late notices.
- Develop a structured approach to records, evidence, and claim documentation.
- Improve the ability to analyze delay events and extension of time claims.
- Prepare clearer and more defensible time and cost claims.
- Review claims submitted by other parties with greater accuracy.
- Reduce disputes through early and organized variation management.
- Improve the quality of contractual correspondence and claim files.
- Strengthen negotiation and settlement capability in project environments.
- Support management decisions through clearer claims reporting.
- Build a practical system for tracking claims and variations across the project lifecycle.

Conclusion

The Advanced Claims & Variations Management course provides a practical and structured framework for managing project claims and variations from the first event through to evaluation, negotiation, and settlement.

The program begins with the contractual foundations of claims and variations, including the relationship between scope, time, price, responsibilities, and entitlement. It then moves into notices, records, and evidence building, as these are critical elements for protecting contractual rights and supporting a strong claim position.

The course then covers delay analysis and extension of time claims, followed by financial impact evaluation and claim preparation. Participants learn how to connect facts, contract provisions, schedule impact, cost impact, and supporting documentation into one coherent claim file.

The final day focuses on claim review, professional responses, negotiation, settlement, and claims tracking. This helps participants evaluate claims more objectively, respond to other parties more effectively, and reduce the risk of unnecessary escalation.

By the end of the course, participants will be better prepared to manage claims and variations with clarity, prepare stronger claim files, evaluate claims from other parties, improve contractual correspondence, and reduce disputes through a disciplined methodology aligned with common international project contract practices, including FIDIC-based principles.