

## Corporate Training Sold by APICS Corporate Services

Corporate Services may contact you with customer on-site training opportunities that occur near you. This typically occurs when the client contacts us directly. The process for these types of engagements is outlined below. We look forward to working with all of our channel partners to serve the client and promote APICS globally.

- 1. Client contacts APICS to secure training services**
- 2. Corporate Services contacts the AEP where the corporation wants training to take place**
  - Process starts with the nearest AEP
  - We are committed to offering local instruction as the first choice
- 3. We then share high level information about the engagement**
  - Dates requested by client
  - Type of company
  - Specific client requests
- 4. Also, we share high level information about instructor/AEP compensation**
  - \$1,000 per day for instructor (plus reasonable expenses)
- 5. Resumes and Non-Disclosure Agreements (NDA's) are requested from the AEP**
  - Please include if instructor is part of IDP and his/her level achieved
  - NDA's cover the communication between Corporate Services and the instructor
  - Prompt responses to these inquiries are necessary. This allows corporate services to provide a quick response to the client
  - Do not become worried/surprised if a client takes their time reviewing or making a decision
- 6. Resumes are presented to corporation**
  - Corporation reviews resume's and selects those instructors they wish to interview
  - Corporate Services will contact these instructors with additional information about the client (if available)
- 7. The interviews take place and the corporation selects an instructor**
- 8. Corporate Services sends an Independent Contractor Agreement to the selected AEP organization**
  - We will also discuss:
    - o The process/procedure for the engagement
    - o Prep work with the client prior to the course
    - o Process for instructor expenses
    - o Corporate interaction
- 9. Separately, Corporate Services contracts with the client for the engagement**
  - Billing, coordination of material, collections, etc... are all handled by Corporate Services
- 10. Course materials (books, surveys, certificates of completion) ship to the client site**
  - The Instructor Kit must be provided by the AEP or instructor
- 11. Instructor completes preparation for the course**
  - We suggest that the instructor hold a 60-90 minute conference call with the corporate contact prior to the start date
  - During this call the instructor can obtain
    - o Specific topics that need to be stressed during the course
    - o Relevant examples
- 12. Course occurs**
  - Course survey at end of class
  - Instructor signs and distributes Certificates of Completion
- 13. AEP invoices corporate services for the instructor and submits expenses**
  - Reasonable expenses must be submitted to Corporate Services through an expense report
  - Expenses will be paid within 30 days (original receipts needed)
  - These fees cannot be paid without an invoice and expense report

### APICS Corporate Services Team

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