



APICS Corporate Services – Part I Overview

Presented by Dominic Longo, Director, APICS Corporate Services

Advancing Productivity, Innovation, and Competitive Success





Why was Corporate Services created?

- Formed: to address a specific set of client needs
- Specifically: the coordination of training engagements held over multiple sites across North America or globally
- Issues:
 - Time Consuming
 - Coordination
 - Contacts with Channel Partners
 - Pricing variability



What does Corporate Services do?

- We act as an extension of your sales effort
- We generate opportunities for the Channel Partners
 - We offer local instruction as the first option
 - We do NOT have staff instructors to offer to clients
- We're here to help the Channel Partners and the Client



Corporate Training managers require a number of deliverables from APICS

- Membership
- Instruction
- Instructor Selection
- Schedule Coordination
- Materials / Courseware
- Student Exams
- Reporting
- Contracting
- Invoicing



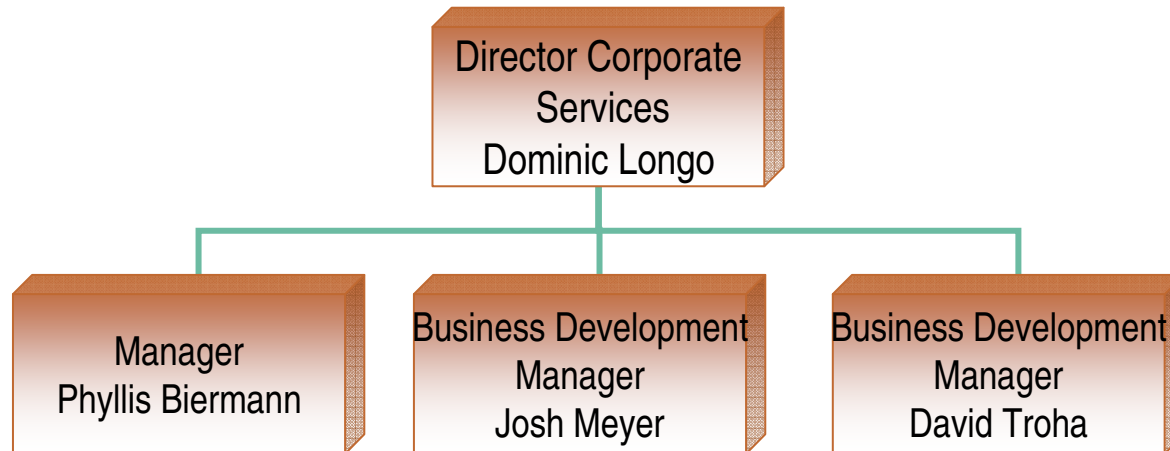
Other Corporate Needs

- Training needs are global
- Resources are limited
- They are asking for a single point of contact

APICS Corporate Services acts to fill those client needs



Corporate Services Team





Corporate Services Scope

- To serve APICS corporate clients:
 - Training
 - Courseware
 - Certification
 - Membership
- *Focused* on customers with needs in multiple regions both domestically and internationally
 - e.g. - Boeing, BASF, DuPont, Unilever, Tetra Pak
- Work with North America and International Channel Partners to deliver on-site training and facilitate testing
- Establish a global relationship and support the local relationship



Keys to Success

- Provide **exceptional service**
- Operating with a **customer first approach**
- Create strong **partnerships** with
 - Channel Partners
 - Other departments at the APICS corporate offices
- Coordinate **consistent delivery** across multiple sites
- Offer local instruction as the **first choice**



Benefits for Customers & Partners

Customers

- Single point-of-contact
- Centralized billing
- Coordinated global training
- Tailored content
- Certification
- Enterprise Membership

International Partners

- Opportunities for Instructors
- Less administration
- New Members
- More time to focus on:
 - Delivery of instruction
 - Student engagement
 - Customer satisfaction



What if...

- You're working with a local office of a large corporation
- They've approached you about training at multiple sites around the world.
- But, your organization has limited resources and cannot meet the client's needs for this opportunity
- This is a great opportunity for APICS to grow

Please contact Corporate Services



Current Success Stories

Food & Beverage

- 14 country training engagement that will encompass 20 individual sessions of BSCM for 300+ students
- Includes new tailored content for all sessions
- Language specific content in Japanese
- Numerous opportunities for future courses

Aerospace

- Pilot program for On-Line training through FVTC
- 20 students – Modules 1 & 2 – Membership for all participants
- Initial feedback is good. Working with FVTC on customer requests

Pharmaceutical

- On-Site engagement for company that primarily uses on-line courses
- Sourced local instructor – high marks on employee survey



Corporate Services Contact Information

Providing the corporate customer with a comprehensive and cohesive program through a single point of coordination

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Thank You

Mid-Presentation Break

Any Questions?



APICS Corporate Services – Part II “The Process”

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How do we do what we do?

13 Easy Steps

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

- Dominic Longo, Director of Corporate Services, dlongo@apics.org
- David Troha, Business Development Manager, dtroha@apics.org
- Josh Meyers, Business Development Manager, jmeyers@apics.org
- Phyllis Biermann, Manager, Corporate Services, pbiermann@apics.org



The Process

1. Client contacts APICS to secure training services
2. Corporate Services contacts the Channel Partner where the corporation wants training to take place
 - Process starts with the nearest Chapter/AEP
 - We are committed to offering local instruction as the first choice



The Process

3. We then share high level information about the engagement
 - Dates requested by client
 - Type of company
 - Specific client requests

4. We also share information about instructor compensation
 - \$1,000 per day for the instructor
 - plus reasonable expenses



The Process

5. Resumes for each instructor and Non-Disclosure Agreements (NDA's) are requested from the Partner.
 - Please include if instructor is part of IDP and level achieved.
 - NDA's cover 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 the resumes or making their decision



The Process

6. Resumes are presented to corporation.
 - Corporation selects the instructors that they wish to interview
 - Corporate Services will contact the instructors who will be selected for interviews to provide additional information about the client (if available)



The Process

7. Interviews take place - Corporation selects an instructor
 - Unsuccessful candidates will be notified by Corporate Services
8. Corporate Services sends an Independent Contractor Agreement to the selected AEP/Chapter.

We will also discuss:

- the process/procedure for the engagement
- prep work with the client prior to the course
- process for instructor expenses
- corporate interaction



The Process

9. Corporate Services contracts with the client.

- Billing, coordination of material, collections, etc...
- Local AEP will be notified that training is taking place
 - Name of Company
 - City where training will take place

10. Course materials (books, surveys, certificates of completion) are shipped to the client site.

- The Instructor Kit must be provided by the AEP/Chapter or instructor



The Process

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
 - Specific topics that need to be stressed
 - Relevant examples
 - Company Data (if available)



The Process

12. Course occurs.

- Course survey is completed at the end of class (on-line)
- Instructor signs and distributes Certificates

13. The AEP invoices Corporate Services for instructor fees & expenses.

- Reasonable expenses must be submitted to Corporate Services through an expense report
- Expenses will be paid within 30 days
 - (original receipts required)



We look forward to working with you !

Any Questions?

Click the Q&A tab to ask your question



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