



Southeast District Chapter Officer Webinar Q&A

November 16, 2011

Topic: Win, Win, Win
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Thank you for your commitment to APICS. APICS corporate staff is dedicated to providing valuable services and programs to the APICS membership—with the help of the many talented volunteers and Channel Partners.

APICS Mission

APICS builds and validates knowledge in supply chain and operations management. We enable our community of members, affiliates and customers to lead in the global marketplace.

Your questions both before and during the November 16, 2011 Southeast District Chapter Officer Webinar are categorized into the following topical areas:

- APICS Interactive Learning - Fox Valley Technical College
- Chapter Services
- Communicating With The Local Chapter
- Contacting Potential Clients
- Enterprise Membership
- Instructors
- Revenue To The Chapters

APICS Interactive Learning - Fox Valley Technical College

Question: For online participants to date is this with 'Interactive Learning' approach with local chapters providing facilitation support or is this just 100% Fox Valley Program?

Response: *We have not had a customer express interest in purchasing additional facilitation for their students. I am aware that FVTC developed a "blended learning" module that can be sold by the chapters. Corporate Services does not sell the "blended learning" product.*

Chapter Services

Question: What type of chapter would utilize Corporate Service?

Response: *Any chapter can utilize our services. All APICS chapters are eligible for Win/Win/Win.*

Communicating With The Local Chapter

Question: How does the Channel Partner know that APICS is holding training in our area?

Response: *When the Corporate Services team starts the search for instructors, the chapters are the first contacted (typically the VP of Education) for a list of instructors. This is the most notable way a chapter will know that APICS Corporate Services is holding training in your area.*

Our clients typically opt for membership because non-member pricing is about 30% more expensive than member pricing. So most clients realize that it is more economical to become a member of APICS in conjunction with training. When those companies secure Enterprise Members, those members will appear within My Chapter.

Question: If we don't have a VP of Education officer, will you contact the Chapter President or call a known instructor within the chapter instead?

Response: *If your chapter does not have a designated education officer we will then contact the Chapter President or another chapter leader. If all else fails, we contact the APICS District and Chapter Services team for assistance with contacting the chapter leadership.*

Question: Will Channel Partners find out who that customer was? Discuss with BOD members?

Response: *After the engagement is completed, the Corporate Services team will contact the Chapter to request a Win/Win/Win invoice. At that time we provide the name of the company, the name of the course that was held (BSCM, CSCP, etc) and the date of the classes. To respect the confidentiality of our corporate contact, we do not disclose the name of our key contact.*

Question: If the chapter does not have an Instructor and a local class is held, will Corporate Services let chapter know about the new APICS members?

Response: *As with all memberships, new member information will appear in My Chapter.*

Instructors

Question: How does Corporate Services find Instructors? If the local chapter does not have an instructor, where do you go to find them?

Response: *First, we contact the leaders of the local chapter(s) that are closest to the training site and request a list of their available instructors to present to the client. If no instructors are available or after several attempts we do not receive a response from the Chapter, then the Corporate Services team will contact neighboring chapters. If all else fails, we will then search for an instructor from the Instructor Development Program pool.*

Question: Does Corporate Services utilize the Instructor Development Program?

Response: *All of the instructors we hire must hold the certification that they are teaching (CSCP or CPIM). We encourage instructors to highlight within their resume that they have the APICS Instructor Development Program designation; however, we do not require that our instructors be a part of IDP, because this would severely limit the total number of instructors that are available. It's my understanding that many chapters do not have IDP instructors.*

Question: Who makes the final instructor selection?

Response: *The client.*

Question: Does the chapter and/or Instructor have to sign an agreement with Corporate Services?

Response: *Instructors are asked to sign non-disclosure agreement when they present their resume. In addition, the instructor who is selected for the engagement is also asked to sign a separate instructor agreement which makes the instructor a sub contractor to APICS for the training engagement.*

Question: Does Corporate Services pay for Instructor travel if needed?

Response: *Travel expenses are paid by the client and those funds are reimbursed through Corporate Services. Instructors are required to prepare an expense report and provide original receipts.*

Question: Does Corporate Services provide the Instructor with the Instructor Guides?

Response: *The instructors are required to have access to current instructor kits. It can be their own or guides that are licensed to the chapter.*

Question: What about instructor expenses and IG kits expenses?

Response: *Please refer to the responses immediately above.*

Revenue To The Chapters

Question: Is the revenue identified as such to the Channel Partner? Can it be mistaken as part of membership dues?

Response: *If a chapter is entitled to receive revenue from the Win, Win, Win program, the Corporate Services team will contact the chapter and request an invoice for the engagement. The chapter is then paid, directly from the invoice submitted. Therefore chapters will be able to track the funds based on their own invoicing system.*

A Sample Email To A Chapter - Requesting A Win, Win Win Invoice:
On August 11 & 12, APICS Corporate Services completed a 2 day, CPIM BSCM onsite training with PMC Biogenix at their plant in Memphis, TN. Although the client ultimately selected an instructor outside the Memphis Chapter, your Chapter will still receive benefits from this engagement. Please reply with an invoice in the amount of \$400.00 to APICS Corporate Services.

Question: Which partner gets the membership fee? APICS Corporate or each member's home chapter?

Response: *Chapters will receive the chapter dues portion of each membership secured.*

Question: Can Channel Partners do all of this same service, at less cost?

Response: *Yes chapters can, and do offer the exact same services to local corporate clients. However, each chapter sets its own course and instructor fees.*

Contacting Potential Clients

Question: Are you cold calling these customers to try to get their business versus the local chapter?

Response: *Corporate Services does reach out to potential customers; however, most of our business comes from APICS' existing clients, new customers who call into the corporate offices or new customers from companies we've met at trade shows and industry events.*

Question: Doesn't the cold call process compete with chapters attempting to get the same business locally, while you are looking at global?

Response: *The sale is ultimately for the Chapter, we view the relationship between Corporate Services and the Chapters as more of a partnership.*

Question: Are you competing with the local chapter, if they have a major corporation in their area?

Response: *No, we do not consider our services as competition to the local chapter. We rely on the chapters for our instructor base; therefore we consider our relationship with chapters as more of a partnership.*

Question: May a chapter contact Corporate Services if they know of potential customers, but have not had time to pursue?

Response: *Yes. Provided that you can provide 1) a key contact who is actively looking for training and 2) some background on the company. Then Win/Win/Win Plus will apply to any lead that comes from a chapter.*

It sounds like this: "We received a call from XYZ Company. Mr. Smith is the head of Supply Chain Excellence and wants to know more about

CSCP & CPIM. They want to understand how class delivery works outside of North America. We can handle their needs locally, but they clearly need help in other parts of the country and also in Europe.”

Corporate Services would completely leave the local opportunity to the chapter and pursue the global opportunity, and the local chapter would still receive funds through Win/Win/Win-Plus once something is sold.

Enterprise Membership

Question: Does Corporate Services require client participants become APICS members?

Response: *Membership is not a requirement; however, our clients typically opt for membership because non-member pricing is about 30% more expensive than member pricing. Most clients realize that it is more economical to become a member of APICS in conjunction with training. When those companies secure Enterprise Members, those members will appear within My Chapter.*