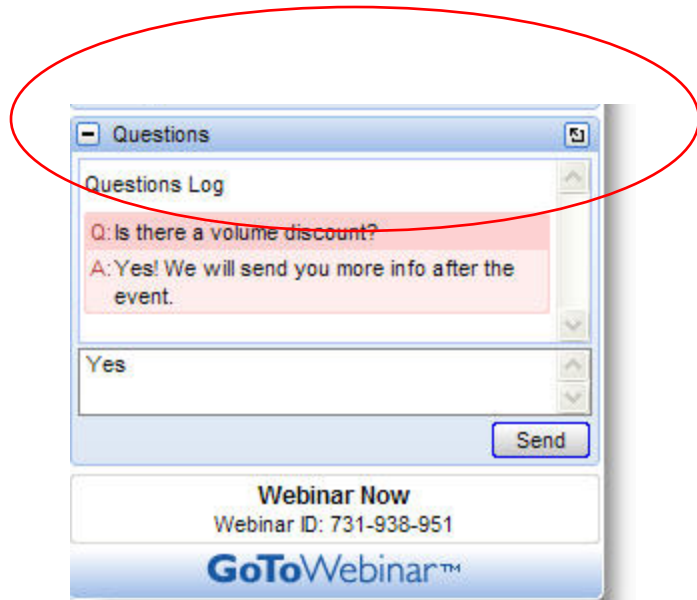




**Welcome To The APICS Southeast District  
Chapter Officers Webinar Series  
August 28, 2013**



# Housekeeping: For A Productive Event!



## Questions:

Due to the amount of content we want to cover, please submit your questions using the webinar toolbar.

Questions not answered during the broadcast, will be answered offline. You will receive an email with a a response to your question.

**So Ask Away!**

# APICS2013

**Orlando, Florida, USA**  
**Gaylord Palms Resort & Convention Center**

Leadership Summit  
Saturday, September 28, 2013  
Noon – 5:00 pm

Volunteer Leaders Reception **(recognizing all volunteers)**  
Saturday, September 28, 2013  
6:00 – 7:30 pm

APICS 2013 Conference  
September 29, 2013 – October 1, 2013



# Chapter Discounts

APICS chapters can register up to five individuals to attend the Leadership Summit in conjunction with the entire APICS 2013 conference at the discounted rate of \$949.

Register using the following RSVP codes to receive the discount:

<u>Code</u>	<u>Registration</u>	<u>Rate</u>
ORFLJ1	Full conference & Leadership Summit	\$949
ORFLJ	Leadership Summit only	Free

**Spread the word to your members:**

**You can earn up to 24 points toward your APICS certification maintenance by attending conference**



# Need Volunteers At Conference

## APICS Volunteer Ambassador Program

We are looking for a few great volunteers to help monitor meeting rooms, welcome attendees, room announcements, and collect evaluations.

### Volunteers Receive

- Reduced rate for conference registration \$769  
**If you have already registered for conference, your rate will be reduced to \$769**
- Certification maintenance points
- Beautiful volunteer ambassador shirt

### If you interested contact:

Lisa Ross, Volunteer Ambassador Leader, [lisa\\_j\\_ross@yahoo.com](mailto:lisa_j_ross@yahoo.com) 919-368-6101







# Final District Meeting

Hosted By: Florida West Coast Chapter

Start Planning Now To Attend

Who Should Attend: Chapter Board of Directors as a team

Date: November 8-9, 2013

Location: Embassy Suites Tampa Westshore Hotel  
\$119 per room, per night  
Tampa, Florida

**Please use the evaluation from today's webinar to submit the topics you would like discussed during the district meeting.**

Stay tuned to the APICS Southeast District website for updates



# Thank You APICS Southeast District Volunteer Management Team





# Thank You 2013/2014 Chapter Volunteers

Appalachian Chapter  
Asheville-WNC Chapter  
Atlanta Chapter  
Birmingham Chapter  
Blue Grass Chapter  
Central Alabama Chapter  
Central Carolina Chapter  
Central Georgia Chapter  
Central Savannah River Chapter  
Charleston Chapter  
Charlotte Chapter  
East Tennessee Chapter  
Eastern North Carolina Chapter  
Falls Cities Chapter  
Florida Gulf Coast Chapter  
Florida Space Coast Chapter  
Florida West Coast Chapter  
Foothills Chapter  
Great Pee Dee Area Chapter  
Greater Jacksonville Chapter

Gumtree Chapter  
Hampton Roads Chapter  
Industrial Crescent Chapter  
Memphis Chapter  
Mid Carolina Chapter  
Mid Florida Chapter  
Mid Tennessee Chapter  
New Orleans Chapter  
North Central Florida Chapter  
Northeast Alabama Chapter  
Ohio Valley Chapter  
Piedmont Triad Chapter  
Puerto Rico Chapter  
South Florida Chapter  
Southern Alabama Area Chapter  
Tennessee Valley Chapter  
Triangle Chapter  
Tri-State Chapter  
Upper Cumberland Chapter





## Today's Speakers



Eric Schneider  
Vice President, Channel Partner Services  
APICS

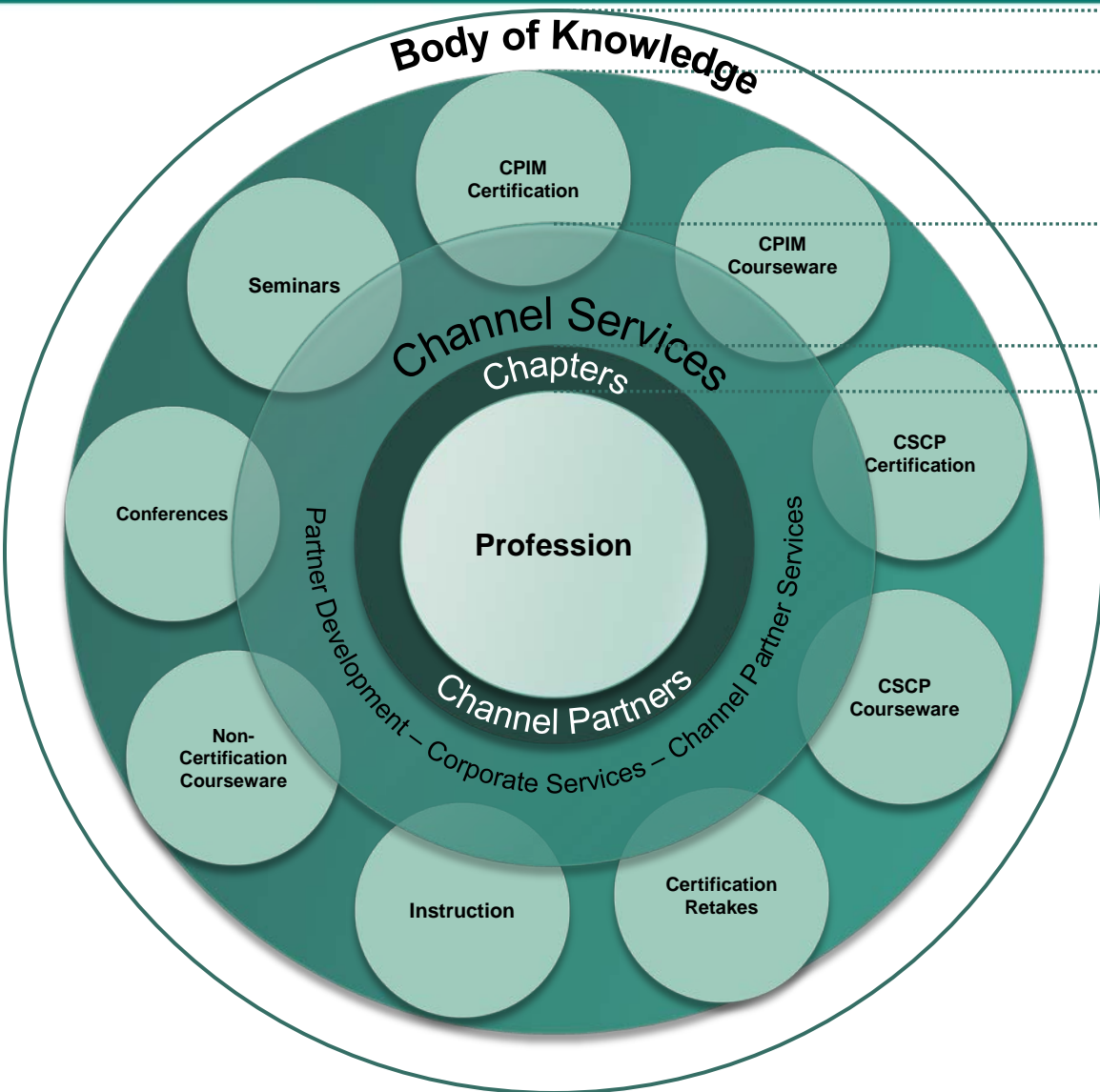


Dominic J. Longo, CSCP  
Director, Corporate Services  
APICS



# Chapter Support: Regional Business Development Manager Program





Knowledge, Innovation, Education & Research

Product, Services & Infrastructure

Growth, Partnership & Relationship

Delivery, Community & Connection

Stakeholders & Core



## Program Goals

- Be mission-driven
- Increase access to APICS products/services
- Strengthen/grow North American Chapters
- Respond to Chapter need for additional sales support
- Collaborate closely and build trust
- Capitalize on Corporate Services infrastructure and sales experience
- Deliver excellent service to the professional and the corporate sponsor





## The Corporate Customer

- A conduit to the individual professional and potential APICS member
- A sponsor of APICS education and certification
- A growing understanding of the individual/corporate mutual benefit and bottom line impact
- An employer
- Corporate Services knows Corporate Customers



## The Regional Business Development Manager - Pilot

- Full-time Sales Professional
- Employed by APICS
- Reporting to Eric Schneider
- Located within the SE District, traveling extensively
- Sells instruction, materials, certifications and membership on behalf of Chapters in the District
- Collaborates directly with District Leadership and Chapter Leadership
- Offers full-service, partial service support and 'opt out'
- Pilot = feedback, consultation and adaptation



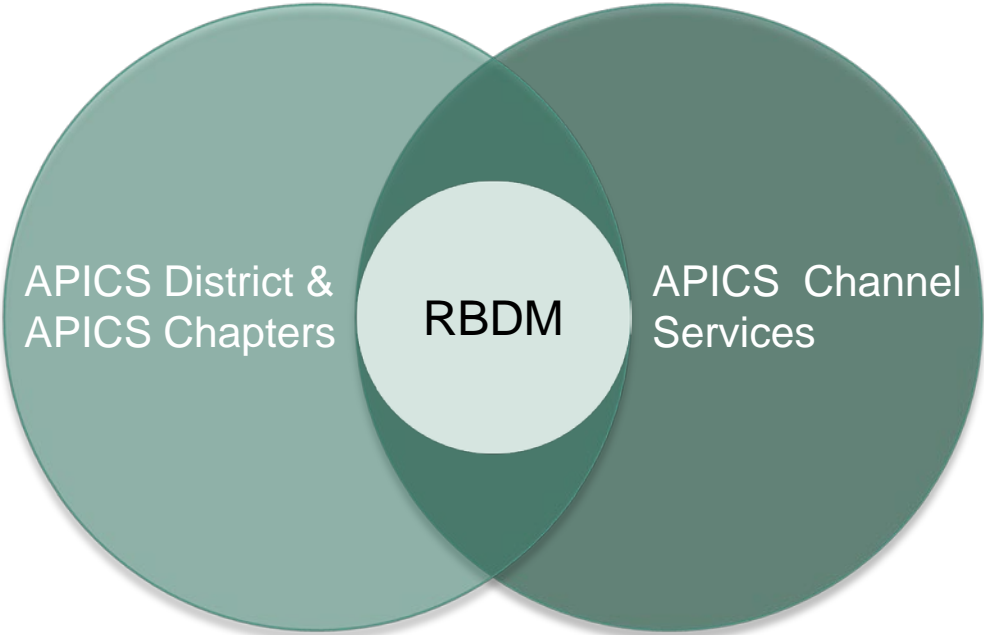
## Benefits to Chapters

- Growth
  - Membership
  - Revenue
  - Visibility
- Expanded relationships with corporate customers
- Experienced, professional sales support
- Increased focus on core strengths
- Corporate Services infrastructure (full-service)



# Working Together

**Local Knowledge**  
**Local Relationship**  
**Lead Generation**  
**Instruction**  
**Local Community**



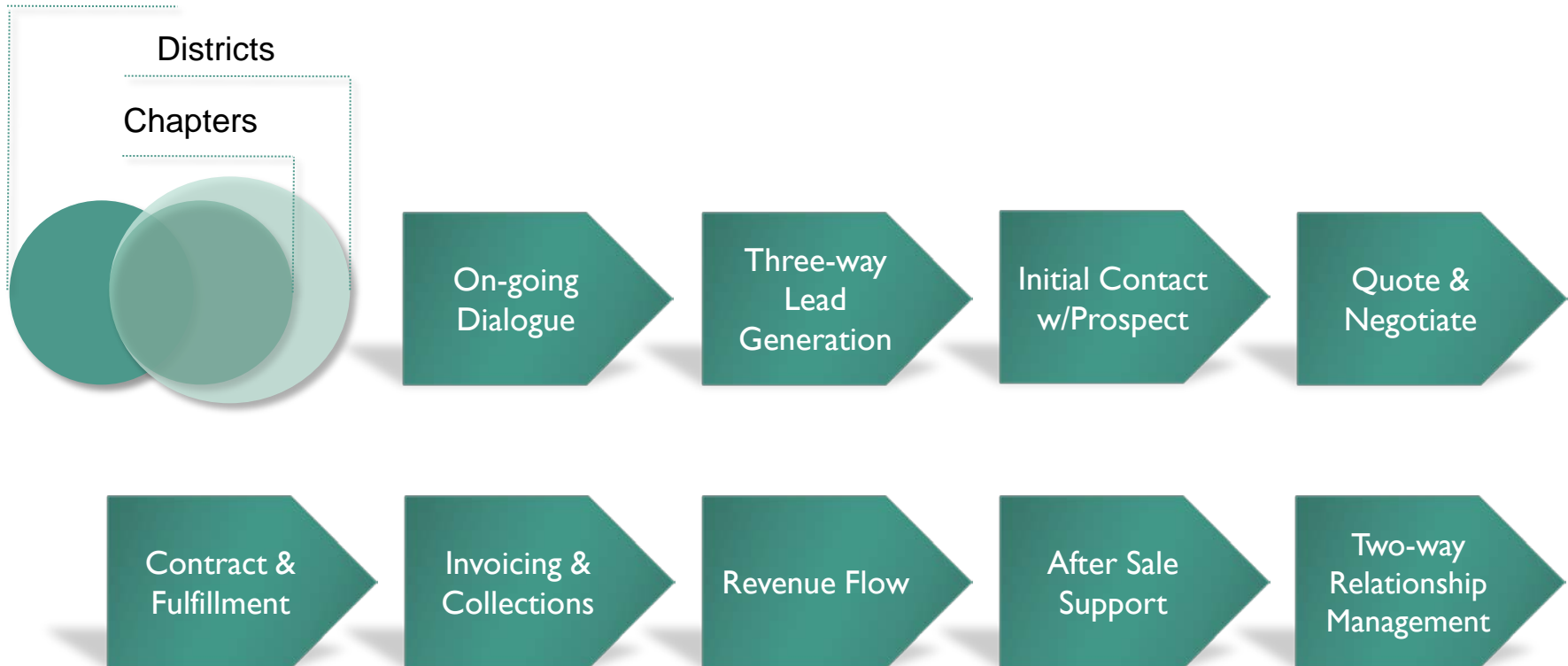
**Infrastructure**  
**Know How**  
**B2B**  
**Global Coordination**





# Working Together – Full Service

RBDM





## On-going Dialogue

- Regular meetings will be scheduled with the District Managers
- RBDM's will meet with Chapter leaders to evaluate the market
  - Understand the local market and history with corporate clients
  - Understand leads that are known to the Chapter
  - Develop a local strategy and target list
- Chapters will be notified about all leads that are in progress
- Regular communication with DFA's re: district issues



## Three-way Lead Generation

- APICS B2B efforts will also generate local leads for the RBDM's
- RBDM will develop the local area through traditional sales techniques
- Chapters should continue their independent efforts to generate leads

Keep in mind: Your existing corporate contacts are an excellent source of new opportunities for new leads

- Suppliers, acquaintances, customers
- Other divisions who may need AIPCS in other parts of the country



## Initial Contact w/Prospect

- RBDM will set-up phone/face-to-face meetings with prospective clients
- These meetings will focus on:
  - Understanding client needs
  - Presenting the APICS products/services that can fulfill those needs
- These can include
  - Membership, Training, Certification, Books/Material, Conferences
- RBDM will make arrangements to introduce a leader from the local Chapter





## Quote & Negotiate

- The initial quotation will be for the APICS Published Rates
  - RBDM will have some latitude to negotiate price
  - Any further negotiation will be in consultation with the Chapter
- Professional quotations will be prepared and sent to the client
- Chapter Leaders will get a copy of the quotation
- The ongoing dialogue with the client will be managed by the RBDM
  - Chapter leaders will continue to be updated on the progression
- Please keep in mind that it can be several weeks/months before a clients gets full approval and funding to move forward



## Contracting

- All training engagements require a signed contract
  - Corporate Services has approved contracts
  - They are regularly used with corporate clients
- Legal staff is available at APICS to support corporate services
  - Client may want to make changes to our standard agreements
- Instructor options are not offered until the agreement is executed
- Contracts are signed at the corporate level



## Fulfillment

- Fulfillment covers a number of activities for Onsite Classes
  - Gathering instructor candidates
  - Presenting instructors to the client
  - Executing Instructor Agreement
  - Coordinating/Finalizing dates
  - Ordering courseware
  - Ordering other material
  - Processing membership orders
  - Processing certification orders (Exam Credits)
  - Processing of instructor invoices and expense reports
- All of these services are provided by the RBDM



## Invoicing & Collections

- Invoicing will be completed by the RBDM in conjunction with Finance
- Instructors are paid upon the completion of the course
- Collections will be managed by the RBDM and Corporate Services
- Funds will be distributed to the Chapter after invoices are paid by the client





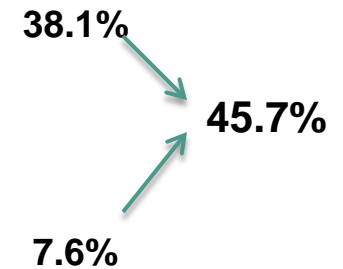
## Revenue Flow

- Once payment is received by the client, funds will start to flow to the Chapter
  - It's common that client payment to take 30 to 60 days
- Funds are distributed according to the following schedule
  - Single Site Engagements → Enhanced Revenue Share for the Chapter
  - Multi-Site Engagements → Traditional Revenue Share for the Chapter



## BSCM - Onsite Training - MULTI SITE

Number of Students		<b>10</b>
Price		<b>\$10,500</b>
Participant Guides		Corporate
Introduction to Materials Management		Corporate
Dictionary		Benefit
<b>Instructor Fees</b>	\$1,000	<b>\$4,000</b>
Classroom Material (pens, paper, tent cards, magazine)		Corporate
Shipping		Corporate
<b>Traditional Revenue Share for Chapter</b>	\$200	<b>\$800</b>



10 Person Enterprise Membership (billed Separately)

\$200      \$2,000

(\$500 Chapter)

10 Exam Credits (billed separately)

\$165      \$1,650



### Chapter Rates

#### **BSCM - Onsite Training - SINGLE SITE**

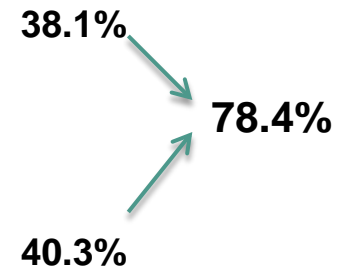
Number of Students	↓	<b>10</b>
Price	↓	<b>\$10,500</b>
Participant Guides	\$90	\$900
Introduction to Materials Management	\$98	\$980
Dictionary	\$0	\$0
Instructor Fees	\$1,000	<b>\$4,000</b>
Classroom Material (pens, paper, tent cards, magazine)	\$10	\$100
Shipping	\$5	\$50
<b>Gross Revenue Share for Chapter</b>		<b>\$4,470</b>

10 Person Enterprise Membership (billed Separately)

10 Exam Credits (billed separately)

\$200	\$2,000
\$165	\$1,650

(\$500 Chapter)





After Sale  
Support

Two-way  
Relationship  
Management

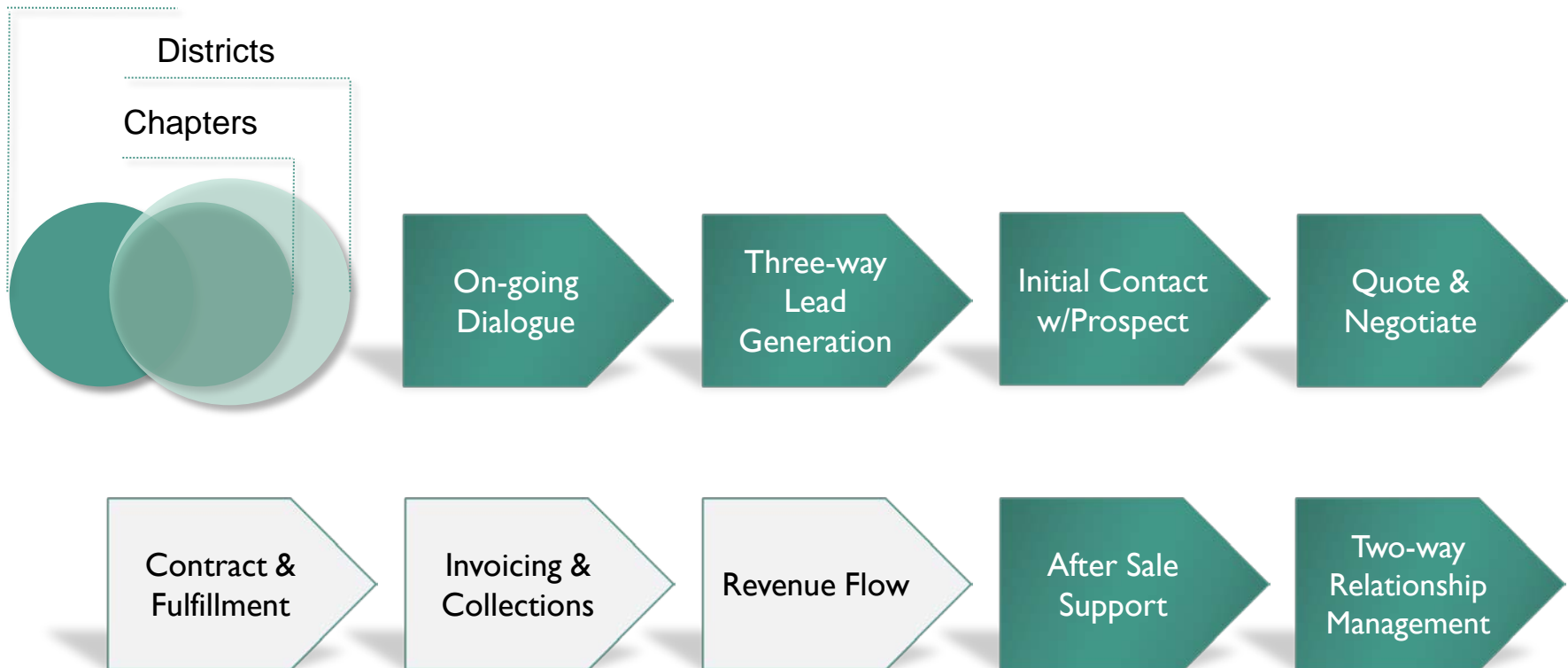
- The RBDM & the chapter should coordinate efforts to follow up with the client
  - The relationship doesn't end after the engagement is complete
  - Neither does the selling
- Opportunities exist to
  - Schedule the next class (Module 2,3,4,5)
  - Promote/Sell other products (certification, conferences, etc.)
- Invite client to attend Chapter activities or become involved as a volunteer
- Develop revenue opportunities outside the local area





# Working Together – Partial Service

RBDM





# Other Common Scenarios



## Membership Only Orders

- APICS already has an efficient mechanism to collect Chapter dues
- Client will provide a roster to RBDM
- RBDM will invoice the client and work with Customer Service to build new membership profiles for client employees
- Payment is received from the client
- Funds are shared monthly with the Chapters based on the new members chapter selection
  - \$50 for Professional Memberships
  - \$25 for eProfessional memberships



## Material Only Orders (CSCP)

- The client is interested in purchasing Learning Systems for a self-paced self-study CSCP program
- RBDM will quote standard pricing based on member and non-member rates
- Client will be invoice by RBDM for the appropriate rate
- Once final payment is received, funds will be transferred to the Chapter
- In this instance, Chapter receives difference between “Chapter Rate” and the amount paid by the client
  - Client Rate: \$895 (rate for orders of 2-25)
  - Chapter Rate; \$615 (rate for all L.S. ordered)
  - Remitted to Chapter \$280 per L.S.





## Client opts for Asynchronous Learning through FVTC

- This engagement is handled as a multi-site engagement
  - The traditional revenue sharing model applies
- Contract is signed by client and a roster is provided to the RBDM
- RBDM will invoice the client and work with Customer Service to enroll students into FVTC, build new membership profiles, ship books and material to each student (typically students are from various locations)
- APICS is billed by FVTC for the engagement
- Chapter receives \$50 for each student from their local area who takes an APICS course through FVTC



## What happens when a single-site becomes a multi-site?

- The possibility exists that a relationship that starts out as “Single-Site” will evolve into a “multi-site” relationship
- Treat the original location as a single-site and all future locations as multi-site
  - Single-Site
    - Enhanced revenue share for the Chapter
      - Chapter pays “chapter rate” for all printed material
      - \$1,000 per day for the instructor
  - Multi-Site
    - Traditional revenue share for Chapter
      - \$200 per day of instruction for the Chapter
      - \$1,000 per day for the instructor



# Win/Win/Win - Lead Generation from your existing clients

Chapters that provide leads to Corporate Services receive a benefit

**Example:** Full CPIM course held in one other location

● BSCM	\$10,500 x 4%	=	\$ 420
● DSP	\$ 9,300 x 4%	=	\$ 372
● MPR	\$ 9,300 x 4%	=	\$ 372
● ECO	\$ 9,300 x 4%	=	\$ 372
● SMR	\$ 9,300 x 4%	=	\$ 372
Total	\$47,700		

Trail Commission **\$1,908**



# Conclusions





## Final Thoughts

- Full-service, partial-service and opt-out
- RBDM 100% focused on Chapter sales
- Collaboration and agreement throughout the process
- Standardized pricing with negotiation determined by Chapter
- Pilot program feedback and modifications



# Appendix: APICS Pricing



## On Site and On Line Course Pricing

<b>On Site</b>	Students Per Class			
<b>Course</b>	4-10	11-15	16-20	21-25
CPIM Module 1 (4 day delivery)	\$10,500	\$11,800	\$13,900	\$16,000
CPIM Module 2 (4 day delivery)	\$9,300	\$10,000	\$11,500	\$13,000
CPIM Module 3 (4 day delivery)	\$9,300	\$10,000	\$11,500	\$13,000
CPIM Module 4 (4 day delivery)	\$9,300	\$10,000	\$11,500	\$13,000
CPIM Module 5 (4 day delivery)	\$9,300	\$10,000	\$11,500	\$13,000
CSCP (6 day delivery)	\$12,000	\$12,000	\$12,000	n/a

<b>On Line</b>	Students Per Class			
<b>Course</b>	4-10	11-15	16-20	21-25
CPIM Module 1 (10 week delivery)	\$1,130	\$1,080	\$1,040	\$1,000
CPIM Module 2 (9 week delivery)	\$1,009	\$959	\$919	\$879
CPIM Module 3 (9 week delivery)	\$1,009	\$959	\$919	\$879
CPIM Module 4 (9 week delivery)	\$1,009	\$959	\$919	\$879
CPIM Module 5 (9 week delivery)	\$1,009	\$959	\$919	\$879

<b>On Line</b>	Students Per Class
Course	8-15
CSCP (12 week delivery)	\$2,100



## Membership and Courseware Pricing

APICS Membership				
Type	Number of Members		Price Per Member	
Tier I	5-24		\$200	
Tier II *	25-50		\$190	
Tier III *	51+		\$180	

\* Once a company reaches 25 Enterprise professional members they can add \$125 additional Enterprise e-Professional Members at a rate of

**Notes:**  
 Corporation can control which employees have access to their Enterprise Membership  
 Memberships are activated upon payment  
 Membership rates are per year per person

Courseware - CPIM	1	25+	50+	Chapter
Basics Participant guides	\$110	\$99	\$94	\$90
APICS Dictionary	\$25	\$25	\$23	\$25
Intro to Materials Management	\$96	\$88	\$83	\$98

Courseware - CSCP	1	2-25	26-50	50-100	101-250
Learning System	\$945	\$895	\$845	\$795	\$745



# Questions