
PREMIER SEARCH REPORT

NOTE:

This sample Premier Search report is based on an actual search conducted for one of our clients. However, all names and identities, including those of the client and all vendors, have been changed. Any similarity in names or identities to actual people or entities is purely coincidental

CLIENT NAME: ABC CAPITAL INC.
CONTACT: BARBARA JONES, MANAGER,
TRAINING & DEVELOPMENT
TOPIC: LEADERSHIP SKILLS TRAINING
DATE : DECEMBER 7, 200X



a division of Connect 4Growth Corp.

Ms Barbara Jones
Training Manager
Training and Development
ABC Capital - Investment Banking Services
123 Commerce St., 32nd Floor
Toronto, Ontario

Dear Barbara,

Thank you again for thinking of Connect4Training for your strategic **leadership skills** training needs. We appreciate the opportunity to have met with you and your team to learn about your learning requirements and vendor selection criteria. We have used that information to guide our search for best-fit vendors, and in this report, will present them for your evaluation.

Our Understanding of Your Needs

ABC Capital is a major player in a fast-changing, fast-growing, and highly competitive segment of your industry, investment banking. Your organization has unique challenges in providing training for current and future leaders. This highly demanding audience will require a training solution vendor that is relevant, practical, and delivered in fast-paced, flexible method. They will not accept a program that is highly theoretical, or delivered at too slow a pace.

Based on the needs that you have communicated to us, we are confident that we have a good understanding of the type of training firm your organization and your people need in order you accomplish your business goals and objectives.

We understand that you want to train 300 employees from two major groups. The training audience are “MBA’s”, typically, highly results-driven “type A personalities”, who work within a highly competitive and aggressive global marketplace. (wholesale investment). Training will be delivered, primarily in traditional classroom format, however, other methodologies such as e-learning may also be included in the overall delivery mix. Training methods such as case study, exercises and activities will be used in order to keep the participants fully engaged. Training delivery will commence in September ‘0X, and run at least until April ’0X. Training components should be *stand*

alone, 1-2 days (max), and customized according to the client's needs. The **topic** is "leadership" – which comprises behaviors that will contribute to improved "strategic leadership", "communication", and performance management/recognition.

About Connect4Training

Connect4Training has been providing vendor search services to large corporations since 1992, and are leaders in vendor relationship management solutions. We have developed a database of over 2500 vendors, which we draw upon for our clients. We also search the broader marketplace, should there not be enough suitable choices available through our network. Our goal is to be the most objective and complete resource for vendors that fit our clients' needs. You can be assured that the vendors we present to you all have experience and credentials that are well-aligned with your business needs.

Our Vendor Choices

We are pleased to present, for your evaluation, three training firms that are qualified to, and experienced with, leadership skills training design and delivery for the investment banking industry. The vendors are:

Collins Enterprises – Led by Wendy Rice, Collins is a New York City-based specialty training and consulting firm servicing, primarily, the global financial services industry. Their approach to training is, as they say, non-prescriptive. In other words, they understand that each client is different and each training need requires a unique solution. As well, in the classroom, their instructors follow a process that involves drawing-out experiences and working with participants to find their best alternatives.

Scott School of Business – Scott School has, over the past 4 years, developed a strong reputation in the training marketplace as a custom training firm. They have provided training in leadership skills for a variety of companies, including banks, therefore they bring with them many best-practices for leadership. Thorough need exploration, expert and relevant design and delivery, and strong post-training evaluation are their hallmarks.

Interact Inc. – Interact is a large US training firm with offices on both coasts. They are experts in designing and delivering training that focuses on interactions between people. Their leadership training programs provide skills for interacting with subordinates as well as peers and superiors.

About this Report

Please review the information that is contained in this report. The Vendor Profiles and other supporting materials will, we are confident, help you and your team to understand the relative strengths of each of the vendors we have presented. Feel free to contact us if you require further clarification and additional information from one of the vendors. As well, if you would like to contact one or more of the vendors directly, we would be pleased to arrange a meeting or conference call on your behalf.

Again, thank you for the opportunity to work with you and your team on your important vendor search. I look forward to continuing to work with you through your vendor evaluation and selection process.

Kind Regards,

Tom Hawkett
President
Connect4Training, a division of Connect4Growth.



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**Leadership Training Opportunity – REQUEST FOR INFORMATION (RFI)
April 30, 200x**

Connect4Training has been engaged by a major client to help them select a vendor to provide services for a “leadership skills training project”. Our client has conducted a formal need’s assessment and employee surveys to validate their needs and identify performance gaps. They have determined that, by running a series of formal stand alone training programs, their learning objectives and business needs can be met. Senior management understands the business reasons for investing in improving leadership skills within the organization, and recognizes the need for this training intervention.

With the support of senior management, our client is now prepared to move forward by preparing a “business case”, for engaging external training providers, for presentation to senior management. This case will propose that a long term, strategic training program will help to achieve behavioral change and improve leadership competencies. It also include verification that vendors, well-aligned with their needs, are available in the marketplace, to design and deliver this type of training. Once best-qualified vendors are identified, the next step will be to request that selected vendors participate in a Request For Proposal process. The RFP will ultimately result in final vendor selection.

Connect4training’s role in “Stage 1” (the RFI) of this process is to “pre-qualify” vendors from our Network that closely fit our client’s requirements, and help them qualify for the RFP stage. To do that, we will need specific information (as outlined at the end of this document) that will give our client the “confidence” that your firm is a viable candidate for “Stage 2”

The purpose of this **RFI** is to ensure **you** have as clear a picture as possible of the client and the training opportunity, and will use your valuable time and effort most effectively in “qualifying” your firm as a candidate for this opportunity. Our objective is to introduce your firm to our client and to help you advance to the final selection decision stage. Our client has requested certain information about your firm, but we also appreciate your questions and suggestions on how we can ensure our client gains a clear perspective on your firm.

Who is our client?

- a leading international company in the wholesale banking industry.

What is the scope of this training project?

- currently, there are approximately 300 managers in the two target audience groups.
- The training audience are “MBA’s”, typically, highly results-driven “type A personalities”, who work within a highly competitive and aggressive global marketplace. (wholesale investment industry)
- Training will be delivered, primarily in traditional classroom format, however, other methodologies such as e-learning may also be included in the overall delivery mix.
- Training methods such as case study, exercises and activities will be employed in order to keep the participants fully engaged.
- Training delivery will commence in September ‘0X, and run at least until April ’0X.
- Training components should be *stand alone, 1-2 days (max), and customized* according to the client’s needs.

What topics do they want training in?

- “leadership” – which comprises behaviors that will contribute to improved “strategic leadership”, “communication”, and performance management/recognition

What do they want to accomplish with training?

- training is ONE component of a larger initiative to improve leadership skills with the organization

What is driving this training initiative?

There are several reasons why this training will be important to the business

- *Competitive advantage* in the marketplace to attract and retain top performers;
- Improve *employee satisfaction* for improved customer sales and service
- Meet a recognized *need for improved leadership* behaviors within the organization

Who are the employees they want training for?

They are in 2 basic groups of leaders:

- (1) “new managers” who are in leadership roles for the first time, but who have several years of experience with the organization in other roles. These people have a small group of employees reporting to them, and need to be able to develop management/leadership skills that will help them transition from being “part of the team”, to “leading the team”.
- (2) “experienced managers” who have been in leadership roles for one or more years. They typically have a team of analysts, associates, associate directors, and directors reporting to them. They will have increased leadership responsibilities and will need to concentrate on developing their key leadership skills.

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Client's Learning Objectives:

Strategic Leadership

- Setting personal goals/objectives for yourself and your team that align with the overall organizational strategy
- Becoming a leader vs. a manager
- Setting goals/objectives to improve overall organizational effectiveness
- Leading high performing teams

Communication

- Your communication style
- Recognizing the barriers to good communication
- Communicating to groups
- Facilitating communication flow
- Motivational communication
- Conflict resolution

Performance Management/Recognition

- Clarifying expectations between employee and manager
- Aligning expectations
- Communication for Performance Management etc.
- Recognition
- Coaching skills (for on the job training)

What do we need from you in order to get your firm to the table for this opportunity?

- Description of your firm's general approach and capabilities for "leadership" skills training
- Description of your firm's understanding and knowledge of both the **industry** and the **target audience**.
- names of **(2-4) client companies** you have done training for (potentially to be contacted as references) in the investment /wholesale banking industry
- Brief description of the kind of training solution that you would potentially propose, based on the information you have so far, and your previous experience with this type of client/audience.
- Your general **pricing guidelines**, so our client will understand your position in the marketplace.

We request that you submit this information to us **in writing, and sent by email to sampleemail@connect4training.com, by no later than Monday, May 10, 200x**. We would like to first speak to you directly about your firm's capabilities prior to preparing any information for us. We will also require that your firm has recently updated your Connect4training registration.

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VENDOR PROFILE

COMPANY NAME & HEAD OFFICE

SCOTT SCHOOL OF BUSINESS - NORTHERN UNIVERSITY

5th Floor - 222 May Street,
Anytown, ON.

Tel: 999-456-9999

CONTACT PERSON

Ms. Judy Church
Associate Director

Connect4Training has had a strong, ongoing relationship with the **Scott School of Business** for over two years and have been successful in matching them with three major clients for long term leadership/management training skills training programs. In our own dealings with Scott, they have consistently demonstrated professionalism, flexibility, and responsiveness in a timely manner.

We have seen Scott School of Business raise their profile within the Canadian training marketplace, and be able to compete for, and win business, against other market-leading vendors. We would regard them now as a high-quality, national provider of training services, particularly in leadership training. Their well-designed programs, high-quality facilitators, and flexibility seem to be major factors driving their client-achievements.

Over the past several years, each of our clients that have “contracted” with Scott have commented that their dealings with this vendor have been very positive, and that the outcomes of the programs that Scott has delivered to date have met their needs. They have been able to match facilitators that fit with clients’ needs and cultures. Program content has been well-aligned with their learning needs, as a result of the up-front assessment work they do, and projects have been well-managed.

In our conversation with Judy Church, we've described your business, and learning needs. Judy is very confident that their organization has the people, programs, and resources to deliver high quality, targeted training for this audience.

Please see the attached, detailed submission, which outlines Scott's capabilities, methodologies, and fee guidelines. As well, you will find two references listed, one of which is Kathy Jones of ABC Bank. Once you have assessed Scott Business School's viability as a prospective candidate for this project, we would be pleased to speak directly with the references listed.

Response to Connect4Training's RFI

The Scott School of Business is excited about the opportunity to enter into a partnership with Connect4Training and our client to leverage their = combined experience and expertise to create a Leadership program that will drive results through enhanced critical thinking, leadership, conflict resolution, change management and executional excellence across the organization.

Their team is eager to create a solution that will support this vision and bring the following strengths to this project:

1. National and International expertise in leadership development programs and processes.
2. A consultative and collaborative approach to training that takes into account current levels of performance and builds solutions to meeting future needs.
3. Program design expertise that will dovetail your client's learning objectives with performance outcomes to demonstrate ROI.
4. A fully integrated approach incorporating instructional design, adult learning and subject matter expertise, in tandem with logistical management and support to provide a complete end-to-end solution.
5. A team of internal and external experts and resources to support the learning."

Pricing Guidelines

As provided in the vendor's attached response,

- **\$5, 435 to \$7, 000 + GST + Instructor expenses** per day for a recommended series of two 2-day seminars for each group of a **maximum of 25 participants**
- **\$1, 850 to \$2, 500 + GST + Instructor expenses** per day for customization

Diagnostic tools cover a wide range and will be billed for at cost.

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References

Since Connect4Training's clients have used successfully used Scott School of Business for contract training, this reference is based on the information that we have received from our client, Wide Telecommunications. Wide has been using Scott for training for approximately one year. Scott has brought to Wide, a valuable array of skills and knowledge through Scott's faculty. Scott ensured that they understood the training need as well as the business need, and were able to craft a program that met both. Scott's subject matter and industry expertise, and their ability to deliver programs that are relevant to the employees receiving training are the primary reasons that Scott has received high evaluation ratings.

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VENDOR PROFILE

COMPANY NAME & HEAD OFFICE

COLLINS ENTERPRISES

69 West 98 Street
New York, NY
10029

www.Collins-ent.com

CONTACT PERSON

Ms Wendy Rice

Wendy@Collins-enterprises.com

Phone - 917- 545-0023

Connect4Training has known Wendy Rice and **Collins Enterprises** for several years, first contacting her in 1998 regarding a banking client's training need. Since then, we have learned more about Collins's strong reputation as high-quality trainers for companies in the banking industry, domestically and internationally. Collins employs highly educated and talented instructional designers and facilitators and, through their work, have earned the respect of many leading corporations for sales as well as leadership training. We have no hesitation in presenting Collins Enterprises for our financial services clients' consideration for strategic and transformational training projects. Connect4training will request industry-specific references from Collins at an appropriate time.

In addition to this document, please also see two additional documents that refer to a recent comprehensive leadership program that Collins Enterprises developed.

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Description of Services

Collins Enterprises offers a suite of leadership learning products that they've developed for prior assignments. Although they have a large number of leadership practices that they've developed over the years, they do not sell off-the-shelf, one-size-fits-all training for leadership. In order to meet their customer's specific needs properly, they suggest that their leadership materials will require at least 20% customization. Should a client's needs be very unique, Collins will design new courses for them from scratch, or do a considerable amount of tailoring. Collins's objective is to provide learning that helps their clients *drive their business strategy*. Please visit this link for a detailed description of Collins's learning services <http://www.Collins-enterprises.com/Learning%20Services/learning.html>

Experience in Financial Services

Collins has worked with many leading financial services firms, both in North America and in Europe, helping them improve their leadership capabilities. They have worked with retail banking, wholesale, and wirehouse (brokerage side of dealmaking). One of their strengths is helping bankers, in all areas, become better leaders.

Collins has told us, based on our description of ABC Capital's services, that they have not served, specifically, an "investment bank" client. They have told us they have worked with clients on the "wholesale" side (mergers and acquisitions, etc.) and have reported that they've had no problem establishing their credibility with them and with virtually all other areas of the bank. They **will** be delivering a new leadership training program to a large European global investment bank and global asset management business".

Learning Methodology

Collins describes themselves as a firm that does NOT do training -- they create learning experiences based on a process of "discovery learning". Discovery learning is learning-by-doing, and by experiencing, in a profound way, through a transparent structure. Collins' facilitators are world-class experts at engaging their participants by having them experience the learning as if they are "doing the work". Participants believe that they are driving the experience, not the facilitator. Discovery learning is what Collins believes helps drive business strategy for their clients

They will not do work for a client until they have a very strong understanding of the business and of what the client's the business objectives are that are driving the learning need. Please visit this link for a detailed description of Collin's Partnership Approach to Development --

<http://www.Collins-enterprises.com/Custom%20Value/design.html#top>

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Collins's approach to training is not "prescriptive". They do not push preconceived/predetermined ideas on their clients or their participants for what they think will work best. Their seminars are delivered on the basis of answers to important questions. Within their workshops, they base their training on the experiences of the participants, find out what has worked for them in the past, and then, helps them find and evaluate alternative actions. The facilitators, and the learning process create, in the participants, a deep and profound respect for the "talent" that is contained in the audience, and draws from all of their strengths. In addition to capitalizing on what the participants experience in their jobs, and in helping them make sense of their environment, Collins's facilitators are also able to offer a wide range of tools and techniques that participants can use in order to gain the results they need to achieve. Collins can either deliver the programs, or provide **train-the-trainer** for client facilitation.

Collins's courses are NOT based on a "telling" methodology. Participants leave the sessions with practical knowledge, tools, and models that they can use right away. Collins builds a totally integrated experience for participants, focused on helping their clients achieve their business goals.

Leadership Training Experience

Please see attached Sample Program Outline

Wendy Rice assumes that the attached outline in *not* what our client envisions, but she is confident that it shows what is possible in terms of creating leadership, organizational, and business results. Collins's global banking client (customer for this program) wanted this type of program in order to drive business results, to retain key hi-potential people, and to build their bench strength. This program, for high potential managers, will be measured for results - both qualitative and quantitative.

The most recent leadership program by Collins Enterprises, illustrated in the attached diagram, will be used with both Investment Banker and Asset Manager leaders. The program was created for ALL leaders worldwide. It is an immersion program, run over 12 months, for high-potentials in the company.

Collins's confidential client is a major European bank with acquisitions in the U.S. – the European company is branding itself in the U.S. Collins said that their client would prefer they did not use their name for marketing purposes, but will allow themselves to be used as a reference at the appropriate time.

Collins told us that they completed this project last week (week of May 3, 200X). Over the next few weeks Collins will be part of this organization's planning process for 'what's next'.

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Facilitator

Collins's facilitators are considered to be in an "elite" class of learning professionals -- all highly-educated (PhD.-level), from leading Ivy-league schools, with many years of professional experience. The facilitator that Collins suggests for ScotiaCapital's program is a Princeton grad, in his early-60's, who is, apparently, an extremely powerful and effective facilitator. He has worked with many very demanding audiences, including MBA grads, all the way up to groups of MD, Ph.D researchers, who are some of the world's most "skeptical" and difficult-to-convince professionals.

(The bios below are from www.Collins-enterprises.com)

Principal

WENDY RICE - President & Founder

Wendy Rice is an organizational change expert dedicated to building competitive advantage for her corporate clients. A twenty-year veteran of the consulting industry, Price unites her solid understanding of management issues and human resource development with a systemic approach to business transformation.

Since founding Collins Enterprises in 1987, Price has managed and executed customized projects designed to exceed client requirements and produce powerful consulting, coaching and training results.

Rice is on the Board of Directors of the Women's Business Council Board (WBCB). Additionally, she serves as co-chair of the Board of the Women's Presidents Educational Group (WPEG) and as an advisory board member of the National Women's Business Forum. Each of these organizations is committed to creating a level playing field for women enterprises.

Recognized worldwide as an innovative entrepreneur, Price was a member of an international delegation promoting the exchange of management practices between the United States and China. A frequent public speaker, she has appeared in *Business Week* and holds a place in *Who's Who Worldwide*. Price earned an M.S. in Human Resources from Fordham University

Leadership Facilitator

E. THOMAS (TOM) FEHR - Creative Director & Facilitator

Tom Fehr implements whole system, results-oriented solutions to the challenges large and medium-sized enterprises face in today's rapidly changing global economy. A specialist in experiential learning, e-learning, distanced learning, and self-directed team learning, Fehr has designed and facilitated global leadership, executive development and sales training for clients such as American Credit Card, Estelle Lader, and ABC Airlines.

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Fehr speaks regularly on the topics of integrity-based selling, creating championship sales and service teams, and influencing and leveraging client loyalty. He has authored numerous articles addressing sales/marketing strategies, global leadership development, and cross-functional team effectiveness, most recently for the AMA's Management Review. His book, *The Taste for Sales: How to Sell in Difficult Times* is printed in four languages.

Fehr received his B.A. from Cole University, his M.A. from Middle College (R. Cox Fellow), and his Ph.D. from Prince University (Prince National Fellow).

Pricing Guidelines (presented in US dollars)

On limited information about this project with which to go by, Collins estimates design would probably total \$15-20k, depending on number of days needed. Delivery, assuming a high-quality lead facilitator, would be approximately \$6,500 - \$8,000/day. Considering the size of the audience, and the number of courses to be run, about 40 days of delivery would be needed.

References

Connect4Training talked to Amy Smith, Sales Manager, **ABC Airlines** regarding their experience with Collins Ent. Amy told us that Collins has been providing training and consulting services for their company since 1999. Their work with the sales department has covered a broad range of topics and needs, including leadership training. Collins has been very responsive and have been able to make changes in their programs on very short notice, and even during the sessions. ABC recommends Collins for sales training at any level in the organization.

Connect4training talked to Jim Johnson, Director of Sales for **American Credit Card**. Jim told us that they replaced an established training firm with Collins after they found that Collins was a better fit for their organization and could be much more flexible in what, and how they deliver their materials. Program design and delivery has been top-notch and their follow-up work with sales staff has helped to reinforce the classroom instruction. Jim recommends Collins highly.

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VENDOR PROFILE

COMPANY NAME & HEAD OFFICE

INTERACT INC.

60 Town Street
San Francisco, CA US 94100

Tel: 415-241-9999

CONTACT PERSON

Ashley Wells
Sr. Associate
617-234-0000 (Cambridge, MA)
awells@interactassociates.com

Specialties

Primary topics

Leadership development, facilitation, teamwork, coaching

Additional topics

Change management, Training

Primary modes

Multimedia (combination of media), Blended Learning Technologies - Hybrids, Off-the-shelf Web Courses, Classroom Training, Simulation, Experiential - in classroom, Web Based Training (WBT), Synchronous

Types of services provided

In-house customized and off-the-shelf training programs, Consulting services, Keynote addresses, Coaching, e-Learning or Multimedia programs, Public Seminars, Process facilitation, Facilitation of client training programs, Public Seminars, Process facilitation, Consulting, Keynote addresses, Coaching, eLearning

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Synopsis

Connect4Growth has identified **Interact Inc.**, a major US-based training firm, as a potential provider of *management skills* training for Bank Capital's managers on the basis of their extensive experience with firms in your industry, and their 'successes' in training audiences of this type. As the attached summary indicates, INTERACT has significant breadth and depth of expertise as well as programs/program content to deliver effective training to your managers.

In addition to ensuring that their programs/services are designed to provide the results that their clients need, they are also very aware of the need for their clients to assure that the investments they make in training will provide an adequate return. INTERACT has indicated to us that they are very effective in helping corporate training departments develop strong business cases for the training programs/initiatives that they propose to senior management for their support.

Please review the attached **Cover Letter** and **Overview**. Both documents were prepared by Interact's staff in response to your requirements as they have been communicated to us to-date.

Please note that, in addition to the information that INTERACT has presented in their Overview about their capabilities and history, they have also created a **comparison table** that balances the competencies that you want to develop, with the relevant competencies of Interact's programs. In the table, they cover the behaviors listed in: leadership, change management, coaching, and conflict resolution. Interact's Overview document also offers bios of FOUR potential, highly qualified presenters, in section 5 - Deliverers (Quality & Type).

For additional information on this company, we also suggest you visit Interact Associates' website, and in particular, review the following relevant pages:

www.interact.com/html/strategicleadership.html

www.interact.com/html/facilitativeleadership.html

www.interact.com/html/coachingedge.html

www.interact.com/html/teamsaction.html

As well, on Interact Associates' Website, their "Client Stories" page provides a large number of their success stories. Of special interest will be their successes with clients in the Financial Services sector. This link is www.interact.com/html/clientstories.html

Background on Interact Inc.

Interact Inc. is a well-established (since 1969) training firm headquartered in San Francisco, and satellite offices in Atlanta, and the UK. They are a relatively large training company with close to 120 permanent staff and third-party associates. The

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industrial sectors they have serviced are: financial services, energy/oil and gas, utilities, professional services, health care, biotech, pharmaceuticals, technology, government, education, transportation, telecommunications, and manufacturing.

Their clients are the majority of the Fortune 500 companies, as well as government agencies, high-tech firms, and nonprofit organizations around the world on five continents. INTERACT has worked with many **financial services** industry firms, which include several companies in your industry such as Fidelity Investments, Putnam Investments, Morgan Stanley, and others.

Interact Inc. are pioneers in collaborative problem solving and consensus decision making. Their *Interact Method* is a proven approach for building understanding and agreement among people. When people exhibit all four elements – collaborative attitude, facilitative behaviors, strategic thinking and a shared responsibility for success, they are empowered to create the most robust results.

Below are some of Interact Key Qualifications and Capabilities

Interact's training professionals offer a range of both business experience and depth and academic credentials. Many of Interact's trainers hold advanced degrees. Interact will do their best to provide potential clients with a trainer who has a particular business or industry background or specialized academic training. (Please see Interact's Overview document, attached.)

Selected Articles Published by Interact's Principals

Dave Straub, Interact Inc., co-founder

- co-author of the book, "How to Make Meetings More Productive," 1969.
- contributed two chapters to "The Consensus Handbook - How to Reach Agreement," 2000.

Tom Price, PhD, Senior Associate and former CEO,

- wrote "The Job of Leaders," which appeared in the *Human Resource Expert*.

Patrick Averd, Senior Associate

- article, "The Pitfalls of Systems Implementation," Summer Issue of *The Journal for Quality*

Tina Seke, President and CEO

- is co-author, with **Irene Shrape** and Business School Professor, **Rob G. Epp**, of the article, "*Consulting: Solution a Part of the Problem?*".
- also played a pivotal role in formulating the ideas for *Truths Becoming Competitive Traps*.

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Interacts' Philosophy/Methodology and Capabilities Brief

Interact builds organizational capability to achieve strategic objectives by maximizing executive, team, and individual performance.

- Services include the design and delivery of Leadership Development and Learning Systems, and Change Management and Organizational Consulting. Leadership Development & Learning Systems
- Provides more than a roadmap for organization development and transformation, they develop more effective leaders, teams, coaches and internal consultants.
- Draws upon deep experience in strategic thinking, collaboration, team building, group facilitation, instructional design and experiential learning (both on-line and classroom)

Management and leadership development programs

- Interact has created them for some of the best-run companies in the world.
- experiential workshops in leadership, coaching, teamwork, facilitation and change management provide skills people need to think critically, operate collaboratively and perform effectively in fast-paced, high-involvement organizations.

Change Management & Organizational Consulting

- 30 years of experience building collaborative organizations
- helps clients enhance performance and retain top talent during periods of major change by aligning their strategies to their management systems.
- Work across multiple levels and functions
- Translate strategies into action plans with clear accountabilities and deliverables.
- Both the culture and the results are changed long-term.

Supporting Material Provided, & Available (on request)

Please see the attached **Overview** document, which will provide more-detailed information on *Interact Inc.* and their suggested approach, tailored to the specific needs of Connect4Growth's client.

Since the vendor and our client have not yet discussed the specific scope and requirements of their project, the information provided here provides only a broad and general overview of the vendor's capabilities.

Once there is agreement that this vendor represents a feasible potential choice for our client, we will be pleased to contact them to request any additional information that will help you further assess Interact's capabilities and cultural fit for this project.

Biographies on a select number of potential trainers are presented in the attached **Overview** document. Additional biographies on other potential trainers are available from the vendor.

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Brief description of the kind of training solution that you would potentially propose, based on the information you have so far, and your previous experience with this type of client/audience.

This would totally depend on several factors, including:

- Resources available
- Level of current competency and level of proficiency required
- Interest level in extending the learning beyond the classroom and targeting specific business application
- Level of interest in custom solution versus off the shelf

We would make recommendations based on a conversation with the sponsors of the program with an interest of jointly coming to a proposed solution. We know that with this audience and industry, immediate business application, fast paced sessions offered in short timeframes is often the preference. Our tendency would be to go very light on theory and discussion and move to application and coaching quickly. We would also integrate current business issues relevant to the participants into the learning.

Fee Structure

Interact is a premium provider of learning services. Our daily rates range from \$2,900-\$3,500 per day plus travel and expenses. These rates plus cost of manuals are what factor into a project price.

References

A **confidential client** of Interact Inc. agreed to provide this reference on the grounds that they not be identified. We are complying with their wishes. This client, a leader in the financial services, investment banking industry told us that Interact has been providing leadership training for them for over 4 years. Their experience with their industry, and understanding of the business culture has made them a very strong fit for the organization. The session they run are relevant, to the point, and provide the participants with take-aways that they can use immediately in their jobs. Interact's project staff have been very good to work with, and have offered many good suggestions. Interact uses a realistic approach to their training, which is appreciated by the participants.

Connect4training spoke to **Major Bank Inc.** regarding their experience with Interact as a training provider. Bob Marshall, Director of Training told us that their experience with Interact has been very positive. Evaluations for classroom training in leadership, for senior level leaders, have been in the top 10% of all trainers they've used. Major Bank Inc. has also had Interact develop multimedia training tools for mid-level managers, focusing on how to deal with day-to-day leadership issues on the job. Interact has proven that they are in touch with the Bank's changing culture, and, in fact, have been instrumental in helping the organization drive culture change, for the positive.

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