On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order is available through GSA Advantage™, a menu-driven database system. The INTERNET address for GSA Advantage™ is: http://www.GSAAdvantage.gov.

Schedule for Professional Services Schedule (PSS)
Federal Supply Group: 00CORP
Contract Number: 47QRAA19D00AB
Contract Period: July 17, 2019 through July 16, 2024

For more information on ordering from Federal Supply Schedules click on the FSS Schedules button at http://www.gsa.gov/schedules-ordering

Contractor: Innovative Solutions Group, Inc.
7628 Kensington Manor Ln
Wake Forest, NC 27587

Business Size: Small business, SBA certified 8(a) small business

In accordance with 13 C.F.R. 121.404, the Contractor is ineligible to participate in any RFQ that is set aside for small business where the subject contract’s awarded size status for the preponderance NAICS designated in the RFQ is “other than small”.

Telephone: 919-892-8930
Web Site: www.innsolgroup.com
E-mail: elizabeth.lopez@innsolgroup.com
Contract Administration: Elizabeth Lopez

CUSTOMER INFORMATION:

1a. Table of Awarded Special Item Number(s) with appropriate cross-reference to page numbers:

<table>
<thead>
<tr>
<th>SIN</th>
<th>Recovery</th>
<th>SIN Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>874-1</td>
<td>874-1RC</td>
<td>Integrated Consulting Services</td>
</tr>
<tr>
<td>874-7</td>
<td>874-7RC</td>
<td>Integrated Business Program Support Services</td>
</tr>
<tr>
<td>874-4</td>
<td>874-4RC</td>
<td>Training Services: Instructor Led Training, Web Based Training and Education</td>
</tr>
</tbody>
</table>

1b. Identification of the lowest priced model number and lowest unit price for that model for each special item number awarded in the contract. This price is the Government price based on a unit of one, exclusive of any quantity/dollar volume, prompt payment, or any other concession affecting price. Those contracts that have unit prices based on the geographic location of the customer, should show the range of the lowest price, and cite the areas to which the prices apply.
1c. If the Contractor is proposing hourly rates a description of all corresponding commercial job titles, experience, functional responsibility and education for those types of employees or subcontractors who will perform services shall be provided. If hourly rates are not applicable, indicate “Not applicable” for this item.

2. Maximum Order: $1,000,000.00

3. Minimum Order: $100.00

4. Geographic Coverage (delivery Area): Worldwide

5. Point(s) of production (city, county, and state or foreign country): Same as company address


7. Quantity discounts: None

8. Prompt payment terms: Information for Ordering Offices: Prompt payment terms cannot be negotiated out of the contractual agreement in exchange for other concessions.: Net 30 days

9a. Notification that Government purchase cards are accepted up to the micro-purchase threshold: Yes

9b. Notification whether Government purchase cards are accepted or not accepted above the micro-purchase threshold: will accept

10. Foreign items (list items by country of origin): None

11a. Time of Delivery (Contractor insert number of days): Specified on the Task Order

11b. Expedited Delivery. The Contractor will insert the sentence “Items available for expedited delivery are noted in this price list.” under this heading. The Contractor may use a symbol of its choosing to highlight items in its price list that have expedited delivery: Contact Contractor

11c. Overnight and 2-day delivery. The Contractor will indicate whether overnight and 2-day delivery are available. Also, the Contractor will indicate that the schedule customer may contact the Contractor for rates for overnight and 2-day delivery: Contact Contractor

11d. Urgent Requirements. The Contractor will note in its price list the “Urgent Requirements” clause of its contract and advise agencies that they can also contact the Contractor’s representative to effect a faster delivery: Contact Contractor

12. F.O.B Points(s): Destination

13a. Ordering Address(es): Same as Contractor

13b. Ordering procedures: For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPA’s), and a sample BPA can be found at the GSA/FSS Schedule homepage (fss.gsa.gov/schedules).

14. Payment address(es): Same as company address

15. Warranty provision.: Contractor's standard commercial warranty.

16. Export Packing Charges (if applicable): N/A
17. Terms and conditions of Government purchase card acceptance (any thresholds above the micro-purchase level): Contact Contractor

18. Terms and conditions of rental, maintenance, and repair (if applicable): N/A

19. Terms and conditions of installation (if applicable): N/A

20. Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices (if applicable): N/A

20a. Terms and conditions for any other services (if applicable): N/A

21. List of service and distribution points (if applicable): N/A

22. List of participating dealers (if applicable): N/A

23. Preventive maintenance (if applicable): N/A

24a. Environmental attributes, e.g., recycled content, energy efficiency, and/or reduced pollutants: N/A

24b. If applicable, indicate that Section 508 compliance information is available on Electronic and Information Technology (EIT) supplies and services and show where full details can be found (e.g. contactor’s website or other location.) The EIT standards can be found at: www.Section508.gov/.

25. Data Universal Numbering System (DUNS) number: 077020211

26. Notification regarding registration in Central Contractor Registration (CCR) database: Registered

27. Final Pricing:
The rates shown below include the Industrial Funding Fee (IFF) of 0.75%.

**Labor Category Pricing**

<table>
<thead>
<tr>
<th>Labor Categories</th>
<th>Base Year</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Advisory I</td>
<td>$325.84</td>
<td>$335.62</td>
<td>$345.68</td>
<td>$356.05</td>
<td>366.74</td>
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<tr>
<td>Business Advisory II</td>
<td>$296.22</td>
<td>$305.11</td>
<td>$314.26</td>
<td>$323.69</td>
<td>$333.40</td>
</tr>
<tr>
<td>Sr Trainer/Facilitator</td>
<td>$370.28</td>
<td>$381.39</td>
<td>$392.83</td>
<td>$404.61</td>
<td>$416.75</td>
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<tr>
<td>Tier 1 - Senior Instructional Designer</td>
<td>$148.11</td>
<td>$152.55</td>
<td>$157.13</td>
<td>$161.84</td>
<td>$166.70</td>
</tr>
<tr>
<td>Tier 2 - Experienced Instructional Designer</td>
<td>$133.30</td>
<td>$137.30</td>
<td>$141.42</td>
<td>$145.66</td>
<td>$150.03</td>
</tr>
<tr>
<td>Tier 3 - Instructional Designer</td>
<td>$113.55</td>
<td>$116.96</td>
<td>$120.47</td>
<td>$124.08</td>
<td>$127.80</td>
</tr>
<tr>
<td>Tier 1 - Senior Project Manager</td>
<td>$133.30</td>
<td>$137.30</td>
<td>$141.42</td>
<td>$145.66</td>
<td>$150.03</td>
</tr>
<tr>
<td>Tier 2 - Experienced Project Manager</td>
<td>$98.74</td>
<td>$101.70</td>
<td>$104.75</td>
<td>$107.90</td>
<td>$111.13</td>
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<tr>
<td>Tier 3 - Project Manager</td>
<td>$78.99</td>
<td>$81.36</td>
<td>$83.80</td>
<td>$86.32</td>
<td>$88.91</td>
</tr>
</tbody>
</table>
**Service Contract Act:** The Service Contract Act (SCA) is applicable to this contract as it applies to the entire Professional Services Schedule (PSS) Schedule and all services provided. While no specific labor categories have been identified as being subject to SCA due to exemptions for professional employees (FAR 22.1101, 22.1102 and 29 CRF 541.300), this contract still maintains the provisions and protections for SCA eligible labor categories. If and/or when the contractor adds SCA labor categories/employees to the contract through the modification process, the contractor must inform the Contracting Officer and establish a SCA matrix identifying the GSA labor category titles, the occupational code, SCA labor category titles and the applicable WD number. Failure to do so may result in cancellation of the contract.

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**Business Advisory Services Description**

Business Advisor I or II provides consulting and guidance for managing client solution direction and delivery by:

- Senior executive responsible for providing strategic oversight across multiple engagements and interacting with executive level clients.
- Demonstrated senior leadership ability in a position of significant management or strategy consulting responsibility
- Leading identification of business needs and goal planning, to include solution vision and mission, work plans, staffing, and financials
- In-depth knowledge of and ability to facilitate on the following technologies: Cloud, Artificial Intelligence, Saas, IoT, Security, Data Center, and collaborative technologies
- Excellent knowledge of generational and cultural diversity as well as the solutions for bridging identified gaps
- Ability to learn and integrate new information regarding various markets including business strategies, business development, software development, digital transformation and design thinking
- Experienced in developing business solutions and training curricula for a variety of large corporate clients in various industries such as healthcare, information technology, finance, and manufacturing
- Deep knowledge of adult learning theories and how to apply these theories in the design of learning experiences
- Providing expertise and knowledge to direct the implementation of solutions • Directs the development and implementation of communication and training plans
- Selecting the most relevant tools/techniques to meet specific client requirements and mitigate risks
- Developing practical solutions and methodologies using quality standards and industry practices
- Identifying business process gaps and designing solutions utilizing analysis and experience to handle delivery and implementation challenges
- Ensuring completion of projects within estimated time frames and budget
**Business Advisory I Years of Experience**

- Bachelor’s Degree and 11 years’ experience in Executive level consulting, enablement, Agile Workforce alignment, Technology Integration, VTC room design, SaaS collaborative solutions, Security, Acquisition Planning & Modern Workspace design; or 15 years’ experience in related field

**Business Advisory II Years of Experience**

- Bachelor’s Degree and 8 years’ experience in People Enablement, Instructional and Curriculum Design, Agile Workforce alignment, Technology Integration, Security, Modern workspace design; or 12 years’ experience in related field

**Facilitation/Engagement Execution Specialist Description**

A Facilitation/Engagement Execution Specialist possess and/or performs the following:

- Develops and provides training solutions for a variety of delivery formats, including in-person and virtual facilitation, eLearning modules, recorded webinars, video, and performance support tools such as quick reference guides, job aids, etc.
- Extensive experience conducting in-person and/or virtual facilitation
- Possesses experience designing courses using adult learning principles, integrating interactive concepts and activities to encourage knowledge application and skill development
- In-depth knowledge of Cloud, Artificial Intelligence, SaaS, IoT, Security, Data Center, and collaborative technologies
- Excellent knowledge of generational and cultural diversity as well as the solutions for bridging identified gaps in learning
- Ability to learn and integrate new information regarding various markets including business strategies, business development, software development, digital transformation and design thinking, as well as make it relevant to any work area
- Deep knowledge of adult learning theories and how to apply these theories in the design of learning experiences
- Manages and leads strategy project
- Responsible for developing and maintaining project schedules, budgets, and client interactions
- Ensures deliverables are presented to clients in a timely manner
- Supervises day-to-day operations of project team
- Reviews deliverables for quality
- Develops and manages analysis plans to be delivered post-facilitation
- Communicates recommendation to clients, builds alignment, and manages client relationships
- Facilitation certification

**Facilitator/Curriculum Trainer**

- Bachelor’s Degree with 7 years’ experience or 11 years’ experience in related field

*Costs are incurred only when customized course content (not from existing curriculum of content) are necessary to meet the customers’ business objectives. Instructional Design costs additional. Existing courses/curriculum are inclusive of trainer/facilitator costs.*
Instructional Designer Services

Instructional Designers possess and/or perform the following:

- Instructional design and development
- Conducting in-person and/or virtual facilitation
- Utilize rapid development tools such as Captivate, Camtasia Studio, Articulate, Snag-It, and various LMS applications
- Experienced in developing training solutions for a variety of delivery formats, including in-person and virtual facilitation, eLearning modules, recorded webinar, video, and performance support tools such as quick reference guides, job aids, etc.
- Experienced designing courses using adult learning principles, integrating interactive concepts and activities to encourage knowledge application and skill development
- Deep knowledge of adult learning theories and how to apply these theories in the design of learning experiences
- Experienced conducting analyses of target audience and training requirements
- Excellent time and project management skills
- Detail oriented with exceptional verbal and written communication skills
- Ability to learn new tools and processes quickly
- Certification in in-person facilitation, virtual facilitation or instructional design

Advanced Instructional Designer:
- Bachelor’s Degree with 10 years’ experience or 13 years’ experience in related field

Experienced Instructional Designer:
- Bachelor’s Degree with 7 years’ experience or 10 years’ experience in related field

Instructional Designer:
- Bachelor’s Degree with 5 years’ experience or 8 years’ experience in related field

Tier 1- Senior Project Manager

Description:
- PMP Certification
- Experience in a Project Manager role/title
- Experience in a PM role for several unique industries
- Agile Certification
- Lean Six Sigma Certification
- General and management experience in the business community
- Experience managing multiple simultaneous project streams
- Singular entity projects executed exceeding that exceed $10M budget
- Singular entity projects varying in durations 2 months to 3 years
- Coordinating International Project teams with travel
- Various software/tool platform certifications
- Execution of projects in both Waterfall and Agile methodology

**Senior Project Manager:**
- Bachelor’s Degree and 10 years’ experience or 15 years’ experience in related field

**Experienced Project Manager:**
- Bachelor’s Degree with 7 years’ experience or 10 years’ experience in related field

**Project Manager:**
- Associate degree with 5 years’ experience or 9 years’ experience in related field

**Training Course Pricing**

<table>
<thead>
<tr>
<th>Training Course</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collaboration in Today's Digital Era</td>
<td>$3,589.42</td>
<td>$3,697.10</td>
<td>$3,808.02</td>
<td>$3,922.26</td>
<td>$4,039.92</td>
</tr>
<tr>
<td>Change Management</td>
<td>$814.61</td>
<td>$839.05</td>
<td>$864.22</td>
<td>$890.15</td>
<td>$916.85</td>
</tr>
<tr>
<td>Experience Change</td>
<td>$824.48</td>
<td>$849.22</td>
<td>$874.69</td>
<td>$900.94</td>
<td>$927.96</td>
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<tr>
<td>Design Thinking</td>
<td>$1,209.57</td>
<td>$1,245.86</td>
<td>$1,283.23</td>
<td>$1,321.73</td>
<td>$1,361.38</td>
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<tr>
<td>Human Capital</td>
<td>$3,589.42</td>
<td>$3,697.10</td>
<td>$3,808.02</td>
<td>$3,922.26</td>
<td>$4,039.92</td>
</tr>
<tr>
<td>Bridging the Gap</td>
<td>$3,589.42</td>
<td>$3,697.10</td>
<td>$3,808.02</td>
<td>$3,922.26</td>
<td>$4,039.92</td>
</tr>
<tr>
<td>Intellectual Property: The Retiring Workforce</td>
<td>$3,589.42</td>
<td>$3,697.10</td>
<td>$3,808.02</td>
<td>$3,922.26</td>
<td>$4,039.92</td>
</tr>
<tr>
<td>Aligning to an Evolving Workforce Mini-Series</td>
<td>$14,811.08</td>
<td>$15,255.42</td>
<td>$15,713.08</td>
<td>$16,184.47</td>
<td>$16,670.00</td>
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<tr>
<td>Manager Readiness: Leadership in the New Era</td>
<td>$3,589.42</td>
<td>$3,697.10</td>
<td>$3,808.02</td>
<td>$3,922.26</td>
<td>$4,039.92</td>
</tr>
<tr>
<td>Entrepreneurial Leadership</td>
<td>$3,589.42</td>
<td>$3,697.10</td>
<td>$3,808.02</td>
<td>$3,922.26</td>
<td>$4,039.92</td>
</tr>
<tr>
<td>Building Effective Leaders</td>
<td>$3,589.42</td>
<td>$3,697.10</td>
<td>$3,808.02</td>
<td>$3,922.26</td>
<td>$4,039.92</td>
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<tr>
<td>Jumpstart Program</td>
<td>$3,589.42</td>
<td>$3,697.10</td>
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<tr>
<td>Next Generation Sales Leaders</td>
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<td>$3,697.10</td>
<td>$3,808.02</td>
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<td>$4,039.92</td>
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<tr>
<td>Building a High-Performance Culture</td>
<td>$3,589.42</td>
<td>$3,697.10</td>
<td>$3,808.02</td>
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<tr>
<td>Maximizing Sales Performance &amp; Leadership</td>
<td>$3,589.42</td>
<td>$3,697.10</td>
<td>$3,808.02</td>
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<td>$4,039.92</td>
</tr>
<tr>
<td>Time Management &amp; Planning</td>
<td>$3,589.42</td>
<td>$3,697.10</td>
<td>$3,808.02</td>
<td>$3,922.26</td>
<td>$4,039.92</td>
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<tr>
<td>Effective Recruiting &amp; the Evolving Workforce</td>
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<td>$3,697.10</td>
<td>$3,808.02</td>
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<tr>
<td>Mini-Series</td>
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<td>11,441.56</td>
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<td>12,138.35</td>
<td>12,502.50</td>
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<td>------------------------------------------------</td>
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<tr>
<td>Advanced Leaders Mini-Series</td>
<td>$11,108.31</td>
<td>$11,441.56</td>
<td>$11,784.81</td>
<td>$12,138.35</td>
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<tr>
<td>Management Mini-Series</td>
<td>$11,108.31</td>
<td>$11,441.56</td>
<td>$11,784.81</td>
<td>$12,138.35</td>
<td>$12,502.50</td>
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<tr>
<td>Coaching Mini-Series</td>
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<td>$7,627.71</td>
<td>$7,856.54</td>
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<tr>
<td>Workforce Development &amp; Planning Mini-Series</td>
<td>$11,108.31</td>
<td>$11,441.56</td>
<td>$11,784.81</td>
<td>$12,138.35</td>
<td>$12,502.50</td>
</tr>
<tr>
<td>Connecting With Your Customers</td>
<td>$3,589.42</td>
<td>$3,697.10</td>
<td>$3,808.02</td>
<td>$3,922.26</td>
<td>$4,039.92</td>
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<tr>
<td>Identifying Needs &amp; Uncovering the Value Chain</td>
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<td>$3,697.10</td>
<td>$3,808.02</td>
<td>$3,922.26</td>
<td>$4,039.92</td>
</tr>
<tr>
<td>Customer Advocacy</td>
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<td>$3,697.10</td>
<td>$3,808.02</td>
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<tr>
<td>Becoming a Trusted Advisor</td>
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<td>$3,697.10</td>
<td>$3,808.02</td>
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<td>$4,039.92</td>
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<tr>
<td>Becoming a Rainmaker: Seal the Deal &amp; Building a Partnership</td>
<td>$7,178.84</td>
<td>$7,394.21</td>
<td>$7,616.03</td>
<td>$7,844.51</td>
<td>$8,079.85</td>
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<tr>
<td>Building Quality Leadership</td>
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<td>$3,697.10</td>
<td>$3,808.02</td>
<td>$3,922.26</td>
<td>$4,039.92</td>
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<tr>
<td>Agile Workforce and Process Development</td>
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<td>$3,697.10</td>
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<tr>
<td>Building a High-Performing Team</td>
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<td>$3,697.10</td>
<td>$3,808.02</td>
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<td>$4,039.92</td>
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<tr>
<td>Advanced Process Improvement</td>
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<td>$4,039.92</td>
</tr>
<tr>
<td>Ensuring Successful Outcomes</td>
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<td>$3,697.10</td>
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<tr>
<td>B2B Demand Generation</td>
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<tr>
<td>It's All in the Preparation</td>
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<tr>
<td>Consultative Presentation</td>
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<td>$8,249.95</td>
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<tr>
<td>Consultative Selling &amp; Differentiators</td>
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<td>$7,549.87</td>
<td>$7,776.37</td>
<td>$8,009.66</td>
<td>$8,249.95</td>
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<tr>
<td>Debrief/Follow-Up</td>
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<td>$3,922.26</td>
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<tr>
<td>Train the Trainer</td>
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<td>$7,394.21</td>
<td>$7,616.03</td>
<td>$7,844.51</td>
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<tr>
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<td>$2,967.15</td>
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<td>Change Management Value Bundle</td>
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<td>$2,304.58</td>
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<tr>
<td>Advanced Leaders Value Bundle</td>
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<td>$13,628.17</td>
<td>$14,037.02</td>
<td>$14,458.13</td>
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<tr>
<td>Workforce Development &amp; Planning Management Value Bundle</td>
<td>$13,231.23</td>
<td>$13,628.17</td>
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<td>Business Advisory Services I Bundle 20</td>
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**Training Courses: Categories & Descriptions**

Notes:
1) All courses are Intellectual Property of Innovative Solutions Group, Inc. and may not be copied, distributed, or utilized without written consent. These courses NOT included in Train-the-Trainer
2) Each course is offered independently (unless noted otherwise) and/or in a mini-series.
3) Each course consists of 8-hour days, including (1) one-hour lunch break and several 10-minute breaks throughout. Each course requires a minimum of 8 and a maximum of 20 participants.
4) All courses can be customized to meet your business goals/objectives and may require additional fees for content changes and development.
5) Collaboration in Today’s Digital Era is a pre-requisite for all courses, although may be waived after review of participants’ individual/group communication skills.

I. Pre-Requisite Course

   a. **Collaboration in Today’s Digital Era: (1) 8-hour day**

      i. What is collaboration?
      ii. Individual components of collaboration
      iii. Keeping people engaged using billboarding
      iv. Review and learn technologies used for effective collaboration
      v. Skill practice

II. Aligning to an Evolving Workforce Courses

   a. **Change Management: (1) 8-hour day; pricing per participant and includes license fee**

      i. Key concepts associated with organizational change management
ii. Organizational readiness and how to assess it
iii. Tools and a practical, rapid methodology for transforming an organization at 3 levels: Individual, Team, & Organization
iv. Critical success factors in the change process
v. How to effectively address resistance
vi. Minimum 8 participants; Maximum 24 participants

b. Experience Change: (1) 8-hour day; pricing per participant and includes license fee
   i. Identifying why so many strategies stumble at the start of execution
   ii. Keeping everyone aligned, engaged, and moving forward through change
   iii. Learning to quickly build change capability without putting the business at risk
   iv. Learning and implanting the “what to do” and “how to be” of change
   v. Minimum 8 participants; Maximum 24 participants

c. Design Thinking: (2) 8-hour days; pricing per participant and includes license fee
   i. An approach that helps synthesize people’s needs, an idea’s technical feasibility, and its overall business viability
   ii. Design thinking skills
   iii. Learn through engaging video lessons, hands-on activities, sharing insights, and gathering feedback
   iv. Identify customers’ needs
   v. Applied creativity
   vi. Design of services and customer experience
   vii. Minimum 8 participants; Maximum 24 participants

d. Human Capital: (1) 8-hour day: Offered as part of Aligning to an Evolving Workforce Mini-Series
   i. What is Human Capital Management and how is it beneficial?
   ii. The intersection of human capital and business
   iii. Maximizing talent strategies
   iv. Implementing strategic workforce planning
v. Developing employees to their fullest potential

e. Bridging the Gap: (1) 8-hour day: Offered as part of Aligning to an Evolving Workforce Mini-Series

i. Understanding different cultures
ii. Adopting an agile, data-driven, digital culture that encourages rapid learning and drives growth faster than your competition
iii. Ignite an inclusive culture that embraces diverse mindsets, skill sets, and a flexible digital workspace
iv. Working with purpose
v. Designed flexibility using predictive analytics

f. Intellectual Property: The Retiring Workforce: (1) 8-hour day: Offered as part of Aligning to an Evolving Workforce Mini-Series

i. How we extract the progressive, experiential knowledge of a 30+ year tenured employee
ii. Create instructor-led training or e-learning programs utilizing critical intellectual information
iii. Show samples of LMS that can be utilized to track and grade those employees moving into positions
iv. Create a micro-learning video solution to transfer knowledge visually, thus adapting to new generations

g. Aligning to an Evolving Workforce Mini-Series: (4) 8-hour days consisting of courses below:

i. Human Capital
ii. Bridging the Gap
iii. Intellectual Property: The Retiring Workforce
iv. Manager Readiness (see description below in Section II Course a.)

III. Advanced Leadership, Management, and Coaching Courses

a. Manager Readiness: Leadership in the New Era: (1) 8-hour day

i. Clarify the roles and responsibilities of the manager
ii. Identify management style (People-Oriented, Task-Oriented)
iii. Foundational overview for a new supervisory/manager (Common
b. **Entrepreneurial Leadership:** (1) 8-hour day

i. Defining leadership vs. management  
ii. Clarify the characteristics of a great leader  
iii. Motivation and effectively introducing change  
iv. 360-degree assessment key concepts  
v. Accepting responsibility for successes and failures  
vi. Discover personal leadership style and what it means  
vii. Corporate leadership today  
viii. Evaluating and prioritizing best solutions  
ix. Shadow coaching

c. **Building Effective Leaders:** (1) 8-hour day

i. Key attributes of an effective coach  
ii. What coaching IS and IS NOT  
iii. Types of coaching: One-on-One, Situational, In the Moment  
iv. Setting the stage and expectations for successful coaching  
v. Developmental coaching strategies  
vi. Coaching to levels of performance

d. **Jumpstart Program:** (1) 8-hour day

i. Onboarding new employees  
ii. Performance management  
iii. Expectation setting  
iv. Measurement  
v. Manage and leverage diversity  
vi. Build a cohesive team  
vii. Motivation

e. **Next Generation Sales Leaders:** (1) 8-hour day
i. Coaching methods and frequency for formal observations
ii. Assess individual performance against goals and established sales processes
iii. Unit-, dollar-, and time-bound individual goals
iv. Developing action plans for professional development
v. Full-year coaching activities
vi. Coaching sales interactions, outcomes, and activities

**f. Building a High-Performance Culture: (1) 8-hour day**

i. Definition, key purposes, and elements of an employee performance appraisal
ii. The 7 elements of high-performing teams
iii. Influence on team effectiveness
iv. How to radically improve team dynamics and thrive
v. Creating a clear purpose that will inspire people
vi. Create blueprints for actions to achieve goals
vii. Use language to build trust, encourage forward thinking, and create energy on the team

**g. Maximizing Sales Performance and Leadership: (1) 8-hour day**

i. Introduction to performance management systems and working with a complete business plan
ii. Definition and components of sales management
iii. Goal setting, sales plans and competitive analysis
iv. Managing goals through a closely managed operating system
v. Building a sales plan with defined activities
vi. Assessing the environmental and competitive risks
vii. Monitoring and reviewing schedules

**h. Time management and Planning: (1) 8-hour day**

i. Time management strategies
ii. Creating a plan for each day
iii. Get it done! Don’t procrastinate!
iv. How to delegate
v. How to problem solve
vi. Take care of yourself

i. **Effective Recruiting and the Evolving Workforce: (1) 8-hour day**

   i. Elements of the hiring and selection process
   ii. Effective interview skills
   iii. Behavioral interviewing to identify top candidates
   iv. Behavioral interview model as a guide
   v. Job/position skills and behavioral success criteria
   vi. Plan the interview using two components of a behavioral question
   vii. Conduct the interview with a focused approach
   viii. Evaluate and select the best candidate

j. **Advanced Leaders Mini-Series: (3) 8-hour days consisting of courses below:**

   i. Manager Readiness: Leadership in the New Era
   ii. Building Effective Leaders
   iii. Building a High-Performance Culture

k. **Management Mini-Series: (3) 8-hour days consisting of courses below:**

   i. Manager Readiness: Leadership in the New Era
   ii. Jumpstart Program
   iii. Time Management and Planning

l. **Coaching Mini-Series: (2) 8-hour days consisting of courses below:**

   i. Building Effective Leaders
   ii. Next Generation Leaders

m. **Workforce Development and Planning Mini-Series: (3) 8-hour days consisting of courses below:**

   i. Manager Readiness: Leadership in the New Era
   ii. Jumpstart program
   iii. Effective Recruiting and the Evolving Workforce

**IV. Advanced Sales and Service Training Courses**

a. **Connecting with your Customers: (1) 8-hour day**
i. How to make a connection from the beginning
ii. Understanding the key drivers of customer satisfaction and long-term customer relationships
iii. Insights into customer behavior with emotional intelligence tools
iv. Delivering customer and brand loyalty
v. Effective communication techniques with an emphasis on proactive listening
vi. Non-verbal communication
vii. Reflection & building on experience
viii. Customer connection tools & resources
ix. Skill practice

b. Identifying Needs & Uncovering the Value Chain: (1) 8-hour day

i. Products and services offered and the solutions they provide customers
ii. Effective questioning skills to uncover needs and goals of our customers
iii. Asking questions to clarify customer-expressed wants and actual underlying needs
iv. Determine the knowledge, skills, abilities and behaviors needed to deliver a 5-star customer experience
v. Apply proactive listening skills, understanding motivation and importance of empathy
vi. Skill practice

c. Customer Advocacy: (1) 8-hour day

i. The role of a capable and confident customer advocate
ii. Recognize and address situations of emotional distress
iii. EQ techniques for self-awareness and self-mastery
iv. How advocates change the team environment
v. “Got Service” approach to understanding the customer
vi. Internal alignment: teamwork and the value chain
vii. Review and practice of proactive listening model
viii. Applying the PACT model for problem resolution
ix. Quality assurance and follow-up
x. Detection and escalation of customer-driven concerns
xi. Skill practice

d. Becoming a Trusted Advisor: (1) 8-hour day

   i. What does it take to earn your business?
   ii. Sales and service
   iii. Clear, concise communication: Products, Services, Pricing, Solutions
   iv. Starting with ‘Why’: How Great Leaders Inspire Action!
   v. Account analysis & the consultative approach
   vi. Presenting possibilities
   vii. Being knowledgeable in the customer’s eyes
   viii. Skill practice


e. Becoming a Rainmaker: Seal the Deal & Building a Partnership: (2) 8-hour days

   i. Acknowledging needs
   ii. Review and reinforce the customer’s ‘Why’
   iii. Earning trust: Customer relationships that LAST
   iv. 5 steps to Effective Cross-Selling
   v. Recognizing buying signals
   vi. ‘Ask’ for the sale
   vii. Understanding lifetime value
   viii. Referral Marketing
   ix. The Value Gap: Knowledge, Skill, Time
   x. Understanding Closing Techniques: Test close, Closing questions
   xi. Exceeding customer expectations
   xii. Create advocates from customers
   xiii. Keys to customer follow-up

V. Team Building & Process Improvement

a. Building Quality Leadership: (1) 8-hour day

   i. Define quality initiative as behavior driven change
   ii. Challenge #1: Introduction to Cycle Time & Defect Reduction
iii. Connect roles to quality leadership
iv. Challenge #2: Who is your customer? Success stories
v. Challenge #3: Lessons from Success
vi. Code of team behavior
vii. Critical success factors
viii. Timeframes for process improvement

b. Agile Workforce and Process Development: (1) 8-hour day

i. Challenge #4 Commit to quality
ii. Individual and team behavior indicators
iii. Impact of current process on customer results
iv. Define categories of processes with organization structures
v. Challenge #5: apply key learning via experiential exercises
vi. Introduction to cycle time, relationship mapping
vii. Performance challenge #6: Customer perspectives
viii. Process flowcharting, cross-functional process maps
ix. Methodology of total cycle time reduction (TCTR)
x. Challenge #7: Team assessment of behavior

c. Building a High-Performing Team: (1) 8-hour day

i. Develop quality communication commercial
ii. Define performance outcomes using SMARTER criteria
iii. Challenge #8: sharing SMARTER performance outcome
iv. Challenge #9: Creating a plan for achieving performance outcomes
v. Challenge #10: Models for communicating intent and content
vi. Team assessment
vii. Capturing learnings

d. Advanced Process Improvement: (1) 8-hour day

i. Review learnings
ii. Successfully running the numbers
iii. Explain how Defect Reduction and Cycle Time work together
iv. Define Key Concepts of Six Sigma
v. Calculate Sigma: Six Steps
vi. Challenge #11: Reducing Defects
vii. Growth curve, culture change
viii. Strengths and weaknesses uncovered
ix. Challenge #12: Culture implications

e. **Ensuring Successful Outcomes: (1) 8-hour day**

i. Review of learnings
ii. Launching quality
iii. Leadership by Be/See/Free
iv. Team assessment of behavior
v. Challenge #13: Personal and team commitments
vi. Challenge #14: Progress made and real work accomplished
vii. Performance plan presentations
viii. Levels of commitment
ix. Challenge #15: Involvement vs Enrolling
x. Program evaluation

VI. **Advanced Business Development**

a. **B2B Demand Generation: (2) 8-hour days**

i. The ‘Human Brain’ and selling
ii. Sales process overview
iii. Formulating and refining your target list
iv. Balancing your strategy to include prospective and existing customers
v. Cold Calling vs Warm Calling Techniques
vi. Leveraging existing customer relationships
vii. Partnering and leveraging leads from internal resources
viii. Needs analysis, Discovery questions
ix. Know how to address pain points with your products and services
x. Prospecting
xi. Appointment setting strategies/techniques for the Gatekeeper
xii. Overview of LinkedIn

b. *It’s All in the Preparation: (2) 8-hour days*

i. Benefit-oriented prospecting and networking
ii. Review and practice valid business reasons
iii. Making a customer call
iv. How to research and prepare for an effective call
v. The single most important aspect of the call
vi. Examining and practicing investigative questioning techniques
vii. Knowing your competition
viii. 60-second monologue: My Core Sales Message Presentation
ix. Networking
x. Utilizing LinkedIn for business development

\textbf{c. Consultative Presentation: (2) 8-hour days}

i. Effective time management strategies
ii. Business and territory planning
iii. Making the call
iv. Five-Step sales call model
v. Build trust
vi. Explore and investigate needs and situation
vii. Position and differentiate
viii. Ask for the business
ix. Relationship-focused close
x. Anticipating and preparing for objections: Identifying and troubleshooting
xi. Effective approaches to handling the most common objection you hear

\textbf{d. Consultative Selling & Differentiators: (2) 8-hour days}

i. Creating your business development plan
ii. Customer relationship management to create lasting impressions
iii. What is consultative selling and establishing your differentiators
iv. Importance of small business product knowledge & using it to build relationships
v. Relationship management quadrant
vi. Planned approach to building long-term relationships
vii. After-call work
viii. Skill practice
ix. Sales skill assessment
x. Relationship selling

VII. Add-On Services

a. Debrief/Follow-Up

i. An add-on service to any individual course or mini-series
ii. Provides participants and managers an ample time period during which to apply learned information & skills
iii. Reconvening in group sessions at 30-day and 90-day intervals to reinforce and show actionable insights on how they’ve leveraged key components from training in real-world activities
iv. Video-conference sessions

b. Train the Trainer (only available for content customized to agency goals/objectives)

i. Train potential and/or less experienced instructors on best practices for delivering material, OR
ii. Train experienced instructors/trainers to deliver customized content (agency’s IP)
iii. May be delivered over 1 or 2 days, depending on instructor experience and course content

VIII. Value Package Deals

Note: These packages are offered at a discount and include an essential series of courses bundled with consulting hours and follow-up sessions.
*Value Package Deals for courses priced per participant will include 24 participants, however, billing is done on actual number of participants.

a. Leadership Essentials: (3) courses/ (4) 8-hour days, consulting hours, follow-up, priced per participant *

i. Entrepreneurial Leadership: 1-day
ii. Experience Change: 1-day
iii. Design Thinking: 2-days
iv. 6 hours consulting
v. Debrief/Follow-Up 30-days & 90-days
vi. Pricing includes 24 participants, however, billed on actual number of participants

b. Change Management: (2) courses/ (2) 8-hour days, consulting hours, follow-up, priced per participant *
Each course in this package requires license fees per participant. Price is per participant.

i. Change Management: 1-day
ii. Experience Change: 1-day
iii. License Fees: Includes up to 24 participants for both courses
iv. 6 hours consulting
v. Debrief/Follow-Up 30-days & 90-days
vi. Pricing includes 24 participants, however, billed on actual number of participants

IX. Business Advisory Packages
These packages are bundles of consulting hours based on the advisor level. No expiration on hours.
a. Business Advisory Services I Bundle 10
   i. 10 hours consulting with Business Advisor I

b. Business Advisory Services I Bundle 20
   i. 20 hours consulting with Business Advisor I

c. Business Advisory Services I Bundle 30
   i. 30 hours consulting with Business Advisor I

d. Business Advisory Services II Bundle 10
   i. 10 hours consulting with Business Advisor II

e. Business Advisory Services II Bundle 20
   i. 20 hours consulting with Business Advisor II

f. Business Advisory Services II Bundle 30
   i. 30 hours consulting with Business Advisor II