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| --- | --- |
| **FAC INITIALS - CLIENT – COURSE – TYPE – LOCATION – DATE**  (Example for consistency: Dell – EFP – Virtual – US – March 15) | |
| Client Name: |  |
| Contract Number: |  |
| RL/LC: |  |
| Course: | EDGE for Professionals, Take Back Your Life, Best Year Yet, EDGE for OneNote, EDGE for Teams, Activating Empathy, Conflict@Work (choose one) |
| Virtual Platform link:  **or**  Physical address and conference room: | Zoom / Teams / Other/ Onsite Address / TBD  (Please login to your IW Zoom account to join the session as the host) |
| Session Time and Time Zone: |  |
| Session Sponsor/ Client Coordinator Contact: |  |
| Course Code/ Eval: | TBD/ No IW eval client will send internally |
| Notes for FAC: |  |
| *CONFIDENTIALITY NOTICE: The information transmitted in this invite and in any replies and forwards are for the sole use of the above individual(s) or entities and may contain proprietary, privileged and/or highly confidential information.* ***Do not forward this information to individuals outside of Effective Edge Worldwide, LLC.*** *Any unauthorized dissemination, review, distribution or copying of these communications is strictly prohibited. If this information has been transmitted to you in error, please notify and return the original message to the sender immediately at the above listed address. Thank you for your cooperation* | |
| **Coordinator Process:** | |
| Signed Client Contract received: |  |
| Refresher in the contract: Y/N  Date of refresher session: |  |
| Send scheduling email to client |  |
| Client confirmed dates |  |
| Send LOE/SOW to Finance to send out – change pipeline stage |  |
| Create engagement in D365 |  |
| Create appointment on Engagement calendar |  |
| Send logistics template to client |  |
| Prepare pre-class document (virtual only) (add to calendar invite)   * Includes link/physical address * FAC bio |  |
| Create eval |  |
| Add/update logistics details to engagement calendar |  |
| Are all participants PC users  (NOT MAC USERS):  Y/N |  |
| Roster Received (add to calendar invite) |  |
| Total number of participants: |  |
| Updated delivery w/participants, eval, complete |  |
| **Travel Details (Onsite Only)** | |
| Airport to fly into:  Hotel:  Transportation Recommendations: |  |
| Name / cell phone # of person meeting Facilitator in lobby 30-min prior to the session start time: |  |
| **Onsite Room Requirements (Onsite Only)** | |
| There will be projector and flip charts and/or white board with markers: |  |
| Adequate power outlets: |  |
| Room sound/speakers |  |
| Participants bring laptops |  |
| Everyone to have access to internet |  |
| Room Set-up: | Classroom, boardroom, u-shape, etc |
| Scheduled (RL schedules) |  |
| Pre-Call |  |
| Post Call |  |
| **MPS Exclusive features** | |
|  |  |
| Was MLC Access Purchased? Y/N |  |
| MLC username and password: | **Password:** MPS\*Learning! |