

ONLINE BUSINESS MANAGER CERTIFICATION & TRAINING



Online Business Manager Training Program Participant Agreement

By signing where indicated below, you agree that, if Online Business Manager, a division of 901691 Alberta Ltd. (the "**Company**" or "**we/us**") approves your Application and accepts you as a participant in the Online Business Manager Training Program (the "**Program**"), this Online Business Manager Training Program Participant Agreement (the "**Agreement**") is a binding contract between you and the Company, and determines all of your rights and obligations as a participant in the Program. By signing below, you are acknowledging that you have read, agree to, and accept all of the terms and conditions contained in this Agreement.

Upon acceptance into the Program, you authorize the Company to charge your credit card, or cash your check as payment, for your participation in the Program. Furthermore, you agree that if you are accepted into the Program, you are responsible for the full payment of fees for the entire Program, whether or not you actually attend or complete the Program, and whether or not you have selected a lump sum or monthly payment plan.

However, you may request a refund within fifteen (15) days of your acceptance into the program or before you complete your first three training sessions, whichever comes first. The refund of all monies paid to date will only be processed upon the return and/or destruction of any training materials already received. To further clarify, after this refund deadline has passed, no refunds will be issued and all monthly payments must be paid on a timely basis.

We are committed to providing all Program participants with a positive Program experience. By signing below, you agree that the Company may, at its sole discretion, terminate this agreement and limit, suspend, or terminate your participation in the Program without refund or forgiveness of remaining monthly payments if you become disruptive or difficult to work with, if you fail to follow the Program guidelines, or if you impair the participation of Program instructors or participants in the Program.

Upon completion of the Program, you are eligible to apply for and participate in Certification Week. Upon satisfactory completion of Certification Week and the demonstrated mastery of the necessary skills, you may be certified as an Online Business Manager. The Criteria for successful completion of the Certification Week are attached as Schedule A. Your certification will be issued by the International Association of Online Business Managers. Certification in good standing will require you to maintain your membership in the International Association of Online Business Managers and to comply with their "Code of Ethics" for Online Business Managers, as well as fulfill all membership and continuing education requirements. (These terms and requirements of Certification are outlined in greater detail in the Application and Certification Agreement you will enter into with the International Association of Online Business Managers.)

We respect your privacy and must insist that you respect the privacy of fellow Program participants. By signing below, you agree not to violate the publicity or privacy right of any Program participant. We respect your confidential and proprietary information, ideas, plans and trade secrets (collectively "**Confidential Information**") and must insist that you respect the same rights of fellow Program participants and of the Company.

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By signing below, you agree (1) not to infringe on any Program participants or the Company's copyright, patent, trademark, trade secret or other intellectual property rights, (2) that any Confidential Information shared by Program participants or any representative of the Company is confidential and proprietary and belongs solely and exclusively to the participant who discloses it or the Company, (3) you agree not to disclose such information to any other person or use it in any manner other than in discussion with other Program participants during Program sessions, (4) all materials and information provided to you by the Company are its confidential and proprietary intellectual property, belonging solely and exclusively to the Company, and may only be used by you as authorized by the Company, (5) the reproduction, distribution and sale of these materials by anyone but the Company is strictly prohibited, and (6) all intellectual property and materials of the Company are for use only in your work as an Online Business Manager with your one-on-one clients and these materials may not be used to train others in their use or to train others to become an Online Business Manager, or be presented in group settings or in any other manner which delivers these proprietary materials .

To be clear, you may only use the materials or tools we give you in this training– including access to the Standard Operating Procedures (SOP) Guide template – for your own personal use in your business or with your one-on-one paying clients. You may NOT share, train or otherwise distribute any of these materials in any form with prospects, colleagues, groups or any person who has not hired you as a paying client to work directly with them as an Online Business Manager (ongoing or project based.)

Further, by signing below, you agree that if you violate, or display any likelihood of violating any of your agreements contained in this agreement, the Company and/or the other Program participants(s) will be entitled, in addition to all remedies at law and damages, to injunctive relief to prohibit any such violations to protect against the harm of such violations. You further agree that all legal actions shall be brought in the City of Calgary and be governed by the laws of the Province of Alberta, Canada and further, that you consent to the personal jurisdiction of courts in Calgary, Alberta.

We have made every effort to accurately represent the Program and its potential. The testimonials and examples used are not intended to represent or guarantee that anyone will achieve the same or similar results. Each individual's success depends on many factors, including his or her background, dedication, desire, and motivation. By signing below, you acknowledge that, as with any business endeavor, there is an inherent risk of loss of capital and there is no guarantee that you will earn any money as a result of your participation in the Program. By signing below, you also acknowledge that you have represented to the Company that payment of your Program fees will not place a significant financial burden on you or your family.

The Program instructors are not qualified to provide legal, tax, accounting or financial advice, and the information provided to you by the Program instructors is not intended as such. You should refer all legal, tax, accounting, and financially related inquiries to appropriately qualified professionals.

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Print Name: _____

Date: _____

Signature: _____

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Schedule A

OBM Certification Evaluation Criteria

The OBM Certification Week is a 5 day process that is designed to be "a week in the life of an OBM". We give participants a series of projects to complete during the week - a mix of 'real' client projects as well as some theoretical projects.

We invite a number of small business owners to contribute a project to Certification Week. These projects are real needs that these business owners have at this time, so this is a true taste of what clients are asking from an OBM on the job.

Grading Criteria and evaluation of a pass or fail is determined by the Certification Committee and is based on two components:

1. Successful and timely completion of projects

- Projects are completed and submitted on time as per the deadlines
- The project deliverable is satisfactory and complete, as per review and feedback from the Certification Committee members and the business owners who donate a project.

2. Application of the Key Competencies of the Online Business Manager (as taught in the OBM Training program.)

- Key #1 Knowing the Entrepreneurial Mindset
- Key #2: Own Your Role in Your Client's Business
- Key #3: Be Proactive
- Key #4: Keep Your Client Focused on the Right Stuff
- Key #5: Over Communicate
- Key #6: Be a Decision Maker in the Business
- Key #7: Using your Marketing Mindset
- Key #8: Taking a Coaching Approach in Communications
- Key #9: Know Yourself!

Note that the grading criteria is subject to change, and you will be notified of any changes when you apply to participate in Certification Week.

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Specific Grading Criteria

The Certification Committee will be grading each of your projects based on the following criteria.

Overall Evaluation

It is mandatory to meet each of the following criteria in order to pass certification

- Projects are completed and submitted on time as per the deadlines – if a person does not complete and submit all of their projects they will not pass certification
- The project deliverable is satisfactory and complete, as per review and feedback from the Certification Committee members and the business owners who donate a project. (specifics are outlined for each project as per below)
- An understanding of the entrepreneur and a willingness to work with them from that place (vs. resisting or pushing back on their request) – if someone is highly resistant to the Certification process and is unwilling to participate they will not pass certification
- Asking clarifying questions –in order to clarify expectations and ensure that you have all of the information that you need to successfully complete a project you will need to ask questions of the client. It may not be mandatory in all cases BUT we do require that you actively submit questions at least once in the certification process.
- Offering suggestions and ideas to the client throughout the projects, as a demonstration of applying marketing mindset and being willing to “think on behalf of their business.”
- Presenting solutions (not just options) to the client, being clear on what you recommend and why you are making that recommendation.

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Application of the 9 Key Competencies

In order to pass certification you must score 80% or higher on the overall grading of your projects as outline below.

“Planning” projects

A project that asks you to put together a project plan or “plan of action”

We will be looking for:

- Deliverable** – a project plan that includes a list of tasks, due dates for each task and who would be responsible for completion of each task
- Key 2 - asking questions of the client in order to get a clear picture of expectations OR demonstrating a very clear understanding of expectations
- Key 4 – does the plan add to the client’s workload or relieve their workload? Is the plan “ready to use” or are there still a bunch of blanks that actually mean more work for the client?
- Key 5 – completion but not perfection – getting it done is key, a plan doesn’t have to be perfect because it will evolve over time anyhow
- Key 7 – applying “marketing mindset” and providing suggestions/ideas to the client

“System” projects

A project that asks you to put together a process or system for the client or the business.

We will be looking for:

- Deliverable** –a system or process that will provide a solution to what the client is looking for
- Key 2 - asking questions of the client in order to get a clear picture of expectations OR demonstrating a very clear understanding of expectations
- Key 3 - a proactive approach of TELLING the client exactly what you will do for them and how the system works
- Key 6 – presenting a solution/recommendation and not just “options” – you need to clearly demonstrate why you have chosen the system that you did (or why you have presented a couple of options) and not just give the client a list of options that they need to research themselves. The client should be able to make a quick decision off what is provided.
- Key 7 – applying “marketing mindset” and providing suggestions /ideas to the client

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Research projects

A project that asks you to do research and gather information for the client

We will be looking for:

- Deliverable** – providing a list of information that gives the client what they were looking for and why you chose the information that you provide
- Key 2 - asking questions of the client in order to get a clear picture of expectations OR demonstrating a very clear understanding of expectations
- Key 3 - a proactive approach of TELLING the client exactly what you will do for them
- Key 4 – does your response add to the client’s workload or relieve their workload? Is the information “ready to go” or are there still a bunch of blanks that actually mean more work for the client?
- Key 7 – applying “marketing mindset” and providing suggestions /ideas to the client

Analysis projects

A project that asks you to review information and provide an analysis as it applies to the growth of the business

We will be looking for:

- Deliverable** – a report providing an analysis of the project with your comments and suggestions
- Key 3 - a proactive approach of TELLING the client exactly what you will do for them
- Key 6 – presenting a solution/recommendation and not just “options” – you need to clearly demonstrate what you are seeing and provide an analysis of the information. The client should be able to make a quick decision off what is provided.
- Key 7 – applying “marketing mindset” and providing suggestions /ideas to the client

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People projects

Scenario based projects that ask the OBM "what would you do" as it applies to team and client challenges

We will be looking for:

- Deliverable** – a written or verbal response to the scenario
- Key 8 - A priority on asking questions and listening
- Key 8 – Demonstrating an understanding of the other person's point of view and responding accordingly
- Key 8 - Keeping the focus what is good for the business and not getting bogged down in "people drama"
- Key 9 – having clear boundaries and being willing to enforce them where needed.