



The *CareWise™ Solutions*
Certified Consultant Program

THE CERTIFIED CONSULTANT APPLICATION PROCESS & PRELIMINARY CHECKLIST

Presented By LifeWorkx Inc.

2019

(DOCUMENT 2)





APPLICATION PROCESS - BECOMING A CAREWISE™ SOLUTIONS CERTIFIED CONSULTANT

ABOUT THE CERTIFICATION PROCESS

Becoming a *CareWise™ Solutions* Certified Consultant is an important professional step for consultants and a significant investment for LifeWorkx. It's a process that ensures you are making an informed decision - and that LifeWorkx is engaging with the best-available experienced and respected consultants in their areas of operation. We expect this approach to create win-win outcomes for consultants, clients and LifeWorkx.

THE CERTIFICATION PROCESS WORKS LIKE THIS.

1. Assess the opportunity by first reading *the Preliminary CareWise™ Solutions Consultant Opportunity Checklist* included in this document.
2. What is your decision? Not for you? Thank you for checking it out.
3. If it is for you and you decide to continue with your application then...
4. Download and complete the *CareWise™ Solutions Certified Consultant Application Form*. It is accessible from the link on the "Consultant" page of the website at www.lifeworkx2021.com/become-a-consultant.
5. Email the Form as indicated. You will be invoiced the non-refundable *Application Fee* of \$250 for process your application¹.
6. You will be notified of the success of your Application within 30 days.
7. Confirm your acceptance of the Certified Consultant offer.
8. LifeWorkx will invoice you for the required fees as shown in the fee table later in this document.
9. Certification requires signing an Agreement between LifeWorkx and yourself setting out the terms, conditions & code of practice of the business and professional arrangement.
10. Arrange to attend the three-day Certification Program (accommodation, meals and course fees apply)
11. Satisfactorily complete the *Certification Program*

¹ The Fee table is supplied later in this document. All fees are plus tax if applicable



“IS THIS RIGHT FOR ME?”

PRELIMINARY CAREWISE™ SOLUTIONS

CONSULTANT OPPORTUNITY CHECKLIST

ABOUT THIS CHECKLIST

- *This Checklist is for your information – It does not need to be completed – It is provided so you can make a decision to proceed with the *Application Form*– or not!*
- *This is a *Preliminary Checklist* for consultants considering the opportunity. It helps you to answer the question “*Is this opportunity right for me?*”*
- *It is recommended that the checklist be used as a decision-making tool before proceeding.*
- *LifeWorkx makes this opportunity available for experienced consultants only.*
- *LifeWorkx understands that it is a mutual benefit - for Consultants and for LifeWorkx - if consultants have an opportunity to work through the process before making a decision to proceed – or not. This checklist helps you with this process.*
- *This *Checklist* addresses questions that are included in the *Application Form* for those wishing to proceed.*
- *Before considering these questions, we recommend that you re-read the *CareWise™ Solutions Certified Consultant Opportunity Outline* document on the LifeWorkx website Consultant page at www.lifeworkx2021.com/become-a-consultant.*
- *Please understand that LifeWorkx makes no promises or undertakings about potential revenue from this opportunity. You are the best judge of this for your business, based on your business knowledge, professional judgement and experience.*

**THIS CHECKLIST IS FOR YOUR INFORMATION ONLY.
DO NOT COMPLETE AND SEND THIS TO LIFEWORKX**

CAREWISE™ SOLUTIONS PRELIMINARY CONSULTANT CHECKLIST QUESTIONS

“IS THIS OPPORTUNITY RIGHT FOR ME?”

1. Am I comfortable consulting in this specialist area of CareWise™ Solutions (*e.g. Do I believe that this is a priority area for future business and employee development for my clients?*)
2. Can I see the opportunities and fit with my current consulting niche? (*e.g. Management/Organization/Business Consulting; Strategy; Benefits; EAP; Technology; Learning and Development; Recruitment etc.*)
3. How does it match my professional skills, knowledge and experience?
4. Am I prepared to invest the time to build my CareWise™ knowledge base to a professional level?
5. How can I and my business benefit from Certification? (*e.g. Can I use the opportunities to expand my business/client base?*)
6. Is the revenue potential what I am looking for? (*Please understand that LifeWorkx makes no promises about potential revenue. This is based on your business knowledge, professional judgement and experience.*)
7. Can I benefit from the use of the CareWise™ Solutions brand and logo to expand my client base?
8. Am I prepared to operate in, and help build the CareWise™ Solutions network? (*e.g. make and receive CareWise™ referrals to other consultants.*)

CAN I IDENTIFY PRIORITY CAREWISE™ BUSINESS OPPORTUNITIES?

9. Can I identify 2 or more CareWise™ Solutions consulting opportunities that I can immediately follow-up on with clients?
10. Does this opportunity allow me to expand my client base?

DO I HAVE THE QUALIFICATIONS AND EXPERIENCE?

11. Do I have sufficient consulting experience? (*The Baseline requirement: 3+ years of relevant consulting experience.*)

12. Can I demonstrate success as a consultant? (For example, successful consulting project outcomes experience associated with the completion of numerous consulting projects that met the clients' expectations and can be confirmed by clients) (*This may involve producing a report in the actual Application*)

13. Can I explain how this experience applies to the CareWiseTM opportunity? (*This may involve adding to the report in the actual Application*)

14. Do I have a relevant degree? (*Post graduate level preferred*)

15. Do I have a membership in at least one relevant professional association?

DO I AGREE TO THE CERTIFICATION REQUIREMENTS AND FEES?

16. Certification Requirements

a. Downloading and completing the *Application Form*. This includes payment of the Application Fee of \$250.

b. Paying the balance of the fees as shown in the following table. (Subject to change.)

c. Attending a three-day Certification Program following acceptance of your Application. (accommodation, meals and course fees apply)

d. Satisfactory completion of the *Certification Program*

17. Signing an Agreement between LifeWorkx and yourself setting out the terms, conditions of the professional arrangement.



WHAT IS THE COST?

LifeWorkx adopts a professional approach to the certification, registration and support of its qualified consultants because this is a unique opportunity to be a leader in this rapidly emerging area of *CareWise™ Solutions* for all businesses and for more than 42M employee-caregivers.

This adds value to the brand and means that only experienced and capable consultants who have completed the application and certification process can access the full range of *CareWise™ Solutions* resources and services and market their services as *CareWise™ Solutions* Certified Consultants with the associated branding.

To support and develop the *CareWise™ Solutions* Certified Consultant brand, LifeWorkx applies the following fees.

FEE	AMOUNT	COMMENTS
INITIAL APPLICATION PROCESSING FEE		
1. Application Processing Fee	\$250*	<ul style="list-style-type: none"> ■ This accompanies the written application on the official Certified Consultant Application form. ■ It covers the professional and administrative costs to process each application. ■ Non-refundable.
INITIAL REGISTRATION & CERTIFICATION FEES		
2. Annual Certified Consultant Registration Fee	\$5,000*	<ul style="list-style-type: none"> ■ \$5,000 payable on LifeWorkx approval of the Application and signing of the Certified Consultant Agreement. ■ Non-refundable.
3. Certification Program (3-Day Residential Group Program)	\$4,000* (plus accommodation, meals)	<ul style="list-style-type: none"> ■ \$2,000 (50%) payable on LifeWorkx approval of the Application and signing of the Certified Consultant Agreement. (Non-refundable) ■ \$2,000 (50%) payable 10 days prior to the Program commencement. (Non-refundable) ■ Mandatory program for certification. ■ Includes Consultant Manual plus program resources. ■ Discounted access to <i>CareWise™ Solutions</i> store.
ANNUAL REGISTRATION FEES		
4. Annual Registration Renewal Fee	\$3,500*	<ul style="list-style-type: none"> ■ Invoiced by LifeWorkx 1 month prior to the annual anniversary registration date. ■ Payable on or before the annual anniversary.



FEE	AMOUNT	COMMENTS
		<ul style="list-style-type: none"> ■ Certified Consultant must advise LifeWorkx if renewal is not required. ■ Non-renewal requires the Certified Consultant to cease marketing as a <i>CareWise™ Solutions</i> Certified Consultant and to remove all <i>CareWise™ Solutions</i> references such as trademarks, logos and links from the website and all future consulting material. Effective from the anniversary of Registration.

NOTES:

- All payments are plus tax where applicable.
- Payments are non-refundable, except where this contravenes applicable law.
- The annual *Registration Fee* includes quarterly required Zoom group online professional and networking conversations.
- These are intended for Consultants to remain current with *CareWise™ Solutions* resources and client solutions, to share ideas, experiences, to build inter-company, interdisciplinary *CareWise™* relationships and review customers’ needs and successes.
- It is proposed that Certified Consultants participate at least 2x a year with each conversation being 2-3 hours maximum.
- These will be advised in advance and the prior reading resources distributed at least 10 days prior to the online conference.
- Other Certified Consultant professional support processes may be introduced, including but not limited to:
 - Structured small group processes to address key *CareWise™* client challenges.
 - A *CareWise Client Innovation Program Conference*_(annual) structured as_a hands-on approach, and continuous learning cycle leading to a new program, products/services development to address client feedback, listen to each other, spot trends, address collaboration across their businesses for better solutions and open opportunities such as collaborative grant or funding applications and bring key people together for a customer-specific solution.
- Fees are subject to change without notice.

WHERE TO NOW?

HAVE YOU DECIDED?

- Thank you for taking the time to get to this point in the process.
- If you are ready to proceed, it is time to download the *Application Form* from www.lifeworkx2021.com/become-a-consultant and get started.
- The *Application Form* asks an expanded form of the questions in this document It:
 - Must be completed by the applying Consultant.
 - Requires written responses.
 - Requests documentation including a Capability Statement, evidence of success as a consultant, e.g. in the form of a consulting report.
- Complete the Application Form as requested and submit as directed.
- LifeWorkx will invoice you for the fees as detailed in the Fee Table above
- Expect a 30-day decision process.

NEED MORE INFORMATION?

If you have any questions, please contact Jeannette Galvanek, CEO, LifeWorkx Inc.

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