

KCS *Verified* v4 License Agreement

This License Agreement (the “Agreement”) is made by and between The Consortium for Service Innovation, a Washington non-profit corporation, located at 751 Laurel Street, Suite 533, San Carlos, California (“CSI”) and _____, a _____ corporation, located at _____ (“Licensee”) as of the latest date signed by the parties (the “Effective Date”). The parties agree as follows:

1. Definitions.

a. “KCS *Verified* v4 Trademarks” means the trademarks specified in Exhibit A hereto, which may be amended as provided herein.

b. “KCS *Verified* v4 Products” means Products that comply with the KCS *Verified* v4 Standards and have passed the KCS v4 Verification Process as specified by CSI. Upon execution of this Agreement, the Product(s) identified in Exhibit B shall be designated as KCS *Verified* v4 Product(s).

c. “KCS *Verified* v4 Standards” means CSI’s standards for knowledge management practices and methodologies, which currently includes, but is not limited to, those standards set forth in the CSI document titled “KCS *Verified* v4 Standards Guide”

d. “KCS v4 Verification Process” means the process specified by CSI for determining compliance with the KCS *Verified* v4 Standards, which may include, but is not limited to, attendance at a KCS v4 Foundations Workshop, KCS v4 Program Manager Certification, completion of a KCS *Verified* v4 Self-Assessment worksheets, CSI’s independent evaluation of product functionality based on the KCS *Verified* v4 Technology Demonstration Script and making the completed KCS *Verified* v4 Self-Assessment worksheets available.

e. “Materials” means all materials used or intended to be used in the sale, distribution, marketing or promotion of the KCS *Verified* v4 Products, whether in written, electronic or any other medium, including without limitation, literature, packaging, labels, advertising and promotional materials, artwork, display materials, letterhead, business cards, invoices, price lists and sales materials, brochures, posters and internal and external signage.

f. “Product” means a specific major number product release of a specific product of Licensee.

2. License. Subject to Licensee’s compliance with the terms and conditions herein, CSI grants to Licensee a non-exclusive, royalty-free, personal and nontransferable (with no right to sublicense) right and license to use the KCS *Verified* v4 Trademarks in connection with the sale, distribution, marketing and promotion of KCS *Verified* v4 Products. For each KCS *Verified*

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v4 Product, this license allows Licensee to use the KCS *Verified* v4 Trademarks only in connection with the specific major number product release identified for such KCS *Verified* v4 Products and new point number product releases of such KCS *Verified* v4 Product. By way of example only, if a KCS *Verified* v4 Product is identified as major number product release 2.0, Licensee may use the KCS *Verified* v4 Trademarks with point number product releases 2.1, 2.2, 2.3, etc. Licensee shall not use the KCS *Verified* v4 Trademarks in connection with any other major number product release of a KCS *Verified* v4 Product or any other Product or services without CSI's prior written consent and in accordance with Section 3 below. All rights not expressly granted to Licensee hereunder are reserved to CSI.

3. Additional Products or Major Number Releases.

a. In the event that Licensee desires to use the KCS *Verified* v4 Trademarks in connection with any other major number product release of a KCS *Verified* v4 Product or any other Licensee Product, Licensee shall submit the Product for evaluation under the KCS v4 Verification Process, at CSI's then-current rates, for conformance with the KCS *Verified* v4 Standards. Licensee acknowledges and agrees that CSI may change and update its KCS *Verified* v4 Standards and/or KCS v4 Verification Process from time to time as CSI deems necessary and appropriate in its professional judgment and without notice to Licensee.

b. If, after completing the KCS v4 Verification Process, CSI determines that the Product conforms to the KCS *Verified* v4 Standards, CSI agrees to certify such compliance and authorize Licensee to use the KCS *Verified* v4 Trademarks in connection therewith. Upon CSI's written certification and authorization of any Product as substantially in the form of Exhibit B, such Product shall be deemed a KCS *Verified* v4 Product as that term is used herein, and Licensee's use of the KCS *Verified* v4 Trademarks in connection therewith shall be subject to and governed by the terms and conditions of this Agreement.

c. CSI makes no guarantee that any Product shall be determined to conform to the KCS *Verified* v4 Standards and authorized for use with the KCS *Verified* v4 Trademarks. Further, no Product shall be deemed or construed to be a KCS *Verified* v4 Product and authorized for use with the KCS *Verified* v4 Trademarks except upon CSI's written certification and authorization thereof substantially in the form of Exhibit C.

4. Use of KCS *Verified* v4 Trademarks.

a. Licensee shall only use the KCS *Verified* v4 Trademarks to identify, label and promote KCS *Verified* v4 Products that comply with the KCS *Verified* v4 Standards. Except for such identification, Licensee shall not at any time do, or cause to be done, any act or thing in any way which may suggest, directly or indirectly, that (i) CSI endorses, approves or sponsors Licensee, the KCS *Verified* v4 Products or any other Products or services of Licensee, including without limitation, any judgment or determination by CSI with respect to Licensee's KCS *Verified* v4 Products relative to any other party or its products with which CSI has authorized use of the KCS *Verified* v4 Trademarks; (ii) CSI is the manufacturer, supplier or otherwise a source of any KCS *Verified* v4 Product; (iii) that Licensee is for any purposes an agent of CSI; or (iv) that Licensee promotes or supplies any KCS *Verified* v4 Product on behalf of CSI.

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b. Licensee shall identify new versions of its KCS *Verified* v4 Products as major number product releases or point number product releases accurately and in accordance with its standard business practices. Notwithstanding the foregoing, Licensee shall not identify any new version of a KCS *Verified* v4 Product as point number product release if such version contains significant changes to the KCS *Verified* v4 Product or new functionality.

c. Licensee shall not use, register or attempt to register any domain name, user name or URL incorporating the KCS *Verified* v4 Trademarks or any words or combinations of letters similar to any KCS *Verified* v4 Trademark.

5. Quality and Inspection of KCS *Verified* v4 Products.

a. Licensee shall manufacture, produce, distribute and sell the KCS *Verified* v4 Products and shall use the KCS *Verified* v4 Trademarks only with KCS *Verified* v4 Products manufactured by or for Licensee that comply with the KCS *Verified* v4 Standards. Licensee shall always maintain the quality of the KCS *Verified* v4 Products at a level that meets or exceeds industry standards and not less than the quality of the sample KCS *Verified* v4 Product which was successfully evaluated and certified by CSI in the KCS v4 Verification Process.

b. Licensee will permit representatives of CSI to inspect the KCS *Verified* v4 Products at all reasonable times and on prior written notice. Licensee shall, upon request of CSI, submit to CSI or to its representatives, samples of the KCS *Verified* v4 Products that it sells or intends to sell under the KCS *Verified* v4 Trademarks for the purpose of determining compliance with this Agreement. The quality of KCS *Verified* v4 Products will be deemed acceptable to CSI unless specific written objection is given to Licensee within two (2) weeks of the time of inspection. Licensee shall promptly make any necessary corrections. Licensee shall not use the KCS *Verified* v4 Trademarks in connection with any non-conforming KCS *Verified* v4 Products unless and until such correction is made to CSI's satisfaction.

6. Materials and Display of KCS *Verified* v4 Trademarks.

a. At CSI's request, Licensee shall provide CSI with representative samples of all Materials intended to be used by Licensee and all significant changes to any of the foregoing. When using the KCS *Verified* v4 Trademarks under this Agreement, Licensee undertakes to comply substantially with all laws pertaining to trademarks in force at any time, including without limitation, compliance with marking requirements.

b. Licensee shall comply with CSI's instructions and directions regarding the use, appearance and placement of KCS *Verified* v4 Trademarks, including without limitation, the "KCS *Verified* v4 Style Guide" attached hereto as Exhibit D, which may be revised by CSI from time to time (the "Style Guide"). CSI will provide Licensee with notice of any material changes to the Style Guide.

c. The KCS *Verified* v4 Trademarks shall further be used only in conformance with the following guidelines: (i) the KCS *Verified* v4 Trademarks are proper adjectives and should be followed by generic terms, e.g., Licensee's KCS *Verified* v4 software program; (ii) the KCS

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Verified v4 Trademarks should not be pluralized; (iii) the KCS *Verified* v4 Trademarks should not be used in the possessive form; (iv) the KCS *Verified* v4 Trademarks are never verbs; and (v) the KCS *Verified* v4 Trademarks should always be set off from surrounding text by using initial capital letters, (vi) as indicated in the “KCS *Verified* v4 Style Guide”.

d. Licensee shall not alter the nature or design of the KCS *Verified* v4 Trademarks in any way and shall not use the KCS *Verified* v4 Trademarks in the creation of a composite KCS *Verified* v4 Trademarks or associate it with another trademark or name used by Licensee, unless prior written consent is obtained from CSI.

7. Registration and Licensee. If CSI makes application to register Licensee as a permitted user or registered user of the KCS *Verified* v4 Trademarks if necessary or if requested by CSI, Licensee agrees to join in such application under the conditions of this Agreement and to execute any such documents as may be necessary to implement such application.

8. Disclaimers; Limitation of Liability.

a. Neither the license granted hereunder nor any certification or authorization of CSI for or in connection with any KCS *Verified* v4 Products or any Materials constitutes in any way any representation or warranty: as to the supply of or use of KCS *Verified* v4 Products or that the advertising or promotion of any KCS *Verified* v4 Products or use of any Materials complies with applicable laws or does not infringe or misappropriate any rights of any third party.

b. EXCEPT AS PROVIDED IN SECTION 8d, NOTWITHSTANDING ANY OTHER PROVISION OF THIS AGREEMENT, CSI MAKES NO WARRANTIES REGARDING THE KCS v4 *VERIFIED* TRADEMARKS OR ANY KCS v4 *VERIFIED* PRODUCTS, WHETHER EXPRESS, IMPLIED, STATUTORY, OR IN ANY OTHER PROVISION OF THIS AGREEMENT OR COMMUNICATION WITH LICENSEE, AND CSI SPECIFICALLY DISCLAIMS ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NONINFRINGEMENT.

c. EXCEPT FOR A BREACH OF A PARTY'S DUTY OF CONFIDENTIALITY TO THE OTHER PARTY, NEITHER PARTY SHALL BE LIABLE FOR ANY CONSEQUENTIAL, INDIRECT, INCIDENTAL, OR SPECIAL DAMAGES WHATSOEVER, INCLUDING WITHOUT LIMITATION, DAMAGES FOR LOSS OF BUSINESS PROFITS, BUSINESS INTERRUPTION, ARISING OUT OF OR RELATED TO THIS AGREEMENT EVEN IF SUCH PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

d. CSI represents and warrants that the KCS *Verified* v4 Trademarks will not infringe the trademark rights of any third party. CSI will, as CSI's sole liability and Licensee's exclusive remedy for any breach of the foregoing warranty, indemnify, defend and hold harmless Licensee from and against any claims, actions, losses, liabilities, damages, costs and expenses (including reasonable attorneys' fees) arising from any claim brought by an unaffiliated third party against Licensee that the KCS *Verified* v4 Trademarks, as used in accordance with this Agreement, infringe the trademark rights of such third party.

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9. Indemnity. CSI assumes no liability to Licensee or to third parties with respect to the KCS *Verified* v4 Products manufactured, produced, sold, distributed, marketed or promoted by Licensee in connection with the KCS *Verified* v4 Trademarks or to the use of the KCS *Verified* v4 Trademarks. Licensee will indemnify, defend and hold harmless CSI from and against any and all claims, actions, losses, liabilities, damages, costs and expenses (including without limitation, attorneys' fees and settlement amounts) arising from or related to the manufacture, production, sale, distribution, marketing or promotion of the KCS *Verified* v4 Products, including without limitation, any claims based on product liability, intellectual property infringement or misappropriation, or nonconformity to the KCS *Verified* v4 Standards. The foregoing obligations do not apply to the extent that any trademark infringement claim is based on Licensee's use of the KCS *Verified* v4 Trademarks as permitted under, and in accordance with the requirements of, this Agreement.

10. Term and Termination.

a. Except as otherwise provided herein, this Agreement shall remain in full force and effect for a term of **three years** from the Effective Date of this Agreement. This Agreement may be extended for subsequent **one year** term upon the parties written agreement thereto prior to the expiration of the then-current term; such extension may be limited to one or more specific KCS *Verified* v4 Product(s).

b. Licensee is responsible to update the CSI annually with contact information and the names of the current employees who have attended the KCS v4 Foundations Workshop and hold a KCS v4 Program Managers certification. Failure to provide an annual update to the CSI will result in suspension of the License, removal from the CSI list of KCS *Verified* v4 vendors until the updated information is provided or the term of the License expires.

c. CSI may terminate this Agreement in the event that Licensee: (i) applies for or consents to the appointment of a receiver, trustee, or liquidator for all or a substantial part of Licensee's assets; (ii) is unable to, or admits in writing its inability to, pay its debts as they mature; (iii) makes a general assignment for the benefit of creditors; (iv) has any petition under any bankruptcy law filed against it, which petition is not dismissed within 60 days of such filing, or is adjudicated bankrupt or insolvent; or (v) files a voluntary petition in bankruptcy or a petition or an answer seeking reorganization or an arrangement for the benefit of creditors, or takes advantage of any insolvency law in its capacity as a debtor. In the event that the foregoing clause is held to be unenforceable, then the trustee in bankruptcy or debtor in possession, as applicable, shall be able to maintain this Agreement only if the trustee or debtor in possession abides by all of the provisions herein; and failure to do so shall be a material breach of this Agreement.

d. CSI may terminate this Agreement in the event that Licensee materially breaches this Agreement and fails to cure such breach to CSI's satisfaction within 30 days after written notice thereof.

e. The license granted hereunder to any KCS *Verified* v4 Product shall automatically terminate if Licensee ceases selling or distributing such KCS *Verified* v4 Product for a period of 90 days or more.

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f. Upon termination of this Agreement for any reason, all rights granted to Licensee hereunder shall automatically terminate and revert back to CSI, and Licensee shall cease and desist from all use of the KCS *Verified* v4 Trademarks. Furthermore, Licensee will at no time adopt or use, without CSI's prior written consent, any word or mark which is likely to be similar to or confusing with the KCS *Verified* v4 Trademarks.

11. Ownership of KCS *Verified* v4 Trademarks.

a. Licensee acknowledges that CSI is the owner of the entire right, title and interest in and to the KCS *Verified* v4 Trademarks, and Licensee will not at any time do, or cause to be done, any act or thing in any way impairing or tending to impair any part of such right, title, and interest, and will not challenge the validity of the KCS *Verified* v4 Trademarks. In connection with the use of the KCS *Verified* v4 Trademarks, Licensee shall not in any manner represent that it has any ownership in the KCS *Verified* v4 Trademarks or any registration or applications therefor. Licensee acknowledges that use of the KCS *Verified* v4 Trademarks shall not create in Licensee's favor any right, title, or interest in or to the KCS *Verified* v4 Trademarks, but that all uses of the KCS *Verified* v4 Trademarks by Licensee shall inure to the benefit of CSI.

b. Licensee acknowledges that, from time to time and without prior notice to Licensee, it may be necessary or desirable for CSI to modify certain elements of the KCS *Verified* v4 Trademarks used in connection with the KCS *Verified* v4 Products, to add additional elements to the KCS *Verified* v4 Trademarks, or to discontinue use of some or all of the elements thereof. Accordingly, CSI does not represent or warrant that the KCS *Verified* v4 Trademarks or any elements thereof will be maintained or used in any particular fashion. Any new elements or modifications to existing elements used by CSI following the execution of this Agreement shall be included as the KCS *Verified* v4 Trademarks. In the event that CSI alters any KCS *Verified* v4 Trademarks, or portion thereof, Licensee shall, after written notice from CSI, promptly implement such modifications in future materials.

12. Enforcement. CSI agrees to enforce the KCS *Verified* v4 Trademarks against infringers at its sole option and expense. CSI shall retain all amounts in settlement and damages resulting from its enforcement. In the event CSI elects not to enforce the KCS *Verified* v4 Trademarks after 60 days written request from Licensee to enforce the KCS *Verified* v4 Trademarks, then Licensee may at its option and at its own expense for and on behalf of Licensee, enforce the KCS *Verified* v4 Trademarks. If Licensee enforces the KCS *Verified* v4 Trademarks, it shall retain all damages and amounts in settlement resulting from its enforcement.

13. Publicity. Licensee may, with CSI's prior written consent, issue a press release indicating that Licensee's KCS *Verified* v4 Products have successfully completed the KCS v4 Verification Process and have achieved certification by CSI as meeting the KCS *Verified* v4 Standards. Licensee shall not, without the prior written consent of CSI, refer to CSI or use the CSI name in press releases, advertising or other public or promotional statements. With the Licensee's prior approval CSI may use Licensee's name to publicly disclose and identify the

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KCS *Verified* v4 Products as having successfully completed the KCS v4 Verification Process and having achieved certification of compliance with KCS *Verified* v4 Standards, including without limitation, on its website and in promotional or other materials.

14. Mutual non-disclosure of confidential information. CSI and the Licensee agree to respect the confidentiality of any information designated by either party as confidential and agree not to disclose to any other party any information that may be exchanged that is designated as confidential.

15. General.

a. Licensee may not assign its rights or delegate its obligations under this Agreement, in whole or in part, without the prior written consent of CSI, except in the case of a merger, acquisition or asset sale in which case Licensee may assign its rights or delegate its obligations under this Agreement upon notice to CSI. CSI's rights and duties under this Agreement are freely assignable. Any attempted assignment, transfer, or delegation in contravention of this Section of the Agreement shall be null and void. The Agreement shall be binding upon and inure to the benefit of the parties hereto and their respective successors and assigns.

b. The parties have read this Agreement and agree to be bound by its terms, and further agree that it constitutes the complete and entire agreement of the parties and supersedes all previous communications, oral or written, and all other communications between them relating to the subject hereof. No supplement, modification, or amendment of this Agreement shall be binding, unless agreed upon in writing by the parties.

c. This Agreement shall be governed in all respects by the law and statutes of the State of Washington without regard to its conflicts of laws principles.

d. All notices and requests in connection with this Agreement shall be in writing and sent via facsimile, recognized commercial messenger or delivery service. Notices shall be deemed received upon written confirmation of delivery if sent by facsimile or signing for receipt of delivery if sent by messenger or delivery service. Notices shall be sent to the parties at the addresses at the beginning of this Agreement. A party may change its address by giving the other party written notice in the manner set forth above.

e. Nothing in this Agreement shall be construed to create a partnership or an employer-employee relationship for any reason whatsoever. Each party is acting as an independent contractor and not as an agent, partner, or joint venture with the other party for any purpose. Except as provided in this Agreement, neither party shall have the right, power, or authority to act or to create any obligation, express or implied, on behalf of the other.

f. If any provision of this Agreement, or portion thereof, is found unenforceable, that provision of the Agreement shall be enforced to the maximum extent permissible so as to affect

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the intent of the parties, and the remainder of this Agreement shall continue in full force and effect. Failure by either party to enforce any provisions of this Agreement shall not be deemed a waiver of future enforcement of that or any other provision.

g. The terms, conditions and warranties contained in this Agreement that by their sense and context are intended to survive the completion of the performance, cancellation or termination of this Agreement, including without limitation, Sections 8, 9, 10.e, 11, 13 and 14.

h. No waiver of any breach of any provision of this Agreement shall constitute a waiver of any prior, concurrent or subsequent breach of the same or any other provisions hereof, and no waiver shall be effective unless made in writing and signed by an authorized representative of the waiving party.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the Effective Date.

The Consortium for Service Innovation

Licensee _____

Signature: _____

Signature: _____

Print Name: _____

Print Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

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EXHIBIT A

KCS *Verified* v4 Trademarks



Footnote - KCS v4 is a service of the Consortium for Service Innovation

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License Agreement
EXHIBIT B

KCS *Verified* v4 Products

Licensee Product

Major Number Product Release

**KCS *Verified* v4
License Agreement
EXHIBIT C**

**CERTIFICATION AND AUTHORIZATION
FOR ADDITIONAL KCS v4 VERIFIED PRODUCTS**

This attachment to the License Agreement dated _____, 20__ (the “Agreement”) by and between The Consortium for Service Innovation (“CSI”) and _____, (“Licensee”) amends and supplements the Agreement.

CSI hereby certifies that the following Licensee Product(s) have successfully completed the KCS v4 Verification Process and have been determined to meet the KCS *Verified* v4 Standards. CSI hereby designates such Product(s) as KCS *Verified* v4 Product(s) and authorizes Licensee to use the KCS *Verified* v4 Trademarks in connection therewith in accordance with the terms and conditions of the Agreement. Licensee hereby accepts such certification, designation and authorization.

Licensee Product

Major Number Product Release

The Consortium for Service Innovation

Licensee

Signature: _____

Signature: _____

Print Name: _____

Print Name: _____

Title: _____

Title: _____

Date: _____

Date: _____

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EXHIBIT D

KCS *Verified* v4 Program Style Guide

Style Guide Objective

The KCS *Verified* v4 Style Guide is designed to assist the vendors' effort to increase their market visibility and credibility as a potential strategic partner for KCS adopters.

Style Guide Description

The Style Guide has the following elements which may be used to market the vendor's product as KCS *Verified* v4.

1. KCS *Verified* v4 Logo and Logo Style Guide

The Logo Style Guide defines acceptable use of the logo and color information.

2. KCS *Verified* v4 Press Release

Once the process for Verification is complete, a CSI press release template is available for publication. This communication contains a supporting quote from the Consortium, however in no way endorses the vendors product. Any deviation from this template is forbidden without a permission letter issued by the Consortium for Service Innovation.

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The KCS *Verified* v4 Logo – Color Specifications

With printed materials the KCS *Verified* v4 logo should appear in “full color” with the Consortium purple (Pantone PMS* 261) and black whenever possible. CMYK equivalents to the PMS color should be used when full color (or process) printing is required. With documents printed out on laser printers (color or grayscale), high-resolution logo files (in TIFF format) have been produced. For online (web) needs the *KCS Verified v4* logo files have been produced in GIF format.

When you need to reproduce the KCS *Verified* v4 logo, simply use the digital logo files provided along with this guide.

The KCS *Verified* v4 logo (symbol + logotype) must be positioned on a white background and must always look sharp, clean and well-produced.



CMYK

Purple: C: 51.0 M: 100.0 Y: 0.0 K: 34.0
Black: C: 0.0 M: 0.0 Y: 0.0 K: 100.0

PMS (Pantone Matching System)

PMS: 261

Web smart

Purple: RGB: 85/0/85 Hexadecimal: 550055
Black: RGB: 0/0/0 Hexadecimal: 000000

*** *Pantone Matching System. Pantone Inc.’s standard for color reproduction and color reproduction materials.***

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Logo Usage

To create greater visual impact, keep the area around the KCS *Verified* v4 logo uncluttered.

The logo looks best on a crisp white background. With solid black backgrounds the logo (symbol + logotype) must always be reversed out to white.

Never use placement on photographic or textured backgrounds. Never place the logo or corporate signature within another printed shape.



Full Color: placement on a white background.



Grayscale: placement on a white background. To be used only in white papers, news related materials and when color is not an option.



Black & White: placement on a white background. To be used only in white papers, news related materials and when color is not an option.



Inversed: placement on a solid colored background of your specified print or web colors for use in print or web collateral.

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KCS *Verified* v4 Press Release Requirements

Once the KCS *Verified* v4 candidate completes the four steps to becoming verified, they are offered a supporting quote by the Consortium to be used in their press release announcing their recent accreditation. As referenced in the *Verified Agreement*, there will be no changes to the language provided unless previously approved by the Consortium in writing.

Following is a sample quote for the vendor's press release:

"The Consortium for Service Innovation is pleased to have {*Verified* Vendor name} distinguish themselves as a KCS *Verified* v4 vendor. The Verification process is thorough and challenging, and by completing the process {Vendor Name} has demonstrated they align with and can support the KCS practices", said Greg Oxtan, Executive Director of the Consortium for Service Innovation.

While we encourage creativity and aligning the quote to your products and market, it cannot claim any superior position with respect to

At the conclusion of the press release, the verified Vendor is encouraged to use the following paragraph as reference information.

About the Consortium for Service Innovation

The Consortium for Service Innovation is a nonprofit, alliance of industry leading service and support organizations focused on developing innovative ways to improve the customers' support experience. For more information about the Consortium please visit the web site www.serviceinnovation.org.