

## CSI WORKSHOP LICENSE AGREEMENT

This CSI Workshop 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 94070-3113 (“CSI”) and \_\_\_\_\_, an individual, located at \_\_\_\_\_ (“Licensee”) as of the latest date signed by the parties (the “Effective Date”). The parties agree as follows:

**1. Definitions.** In addition to capitalized terms defined elsewhere in this Agreement, the following capitalized terms will have the meanings set forth below:

1.1 “Display Materials” means, with respect to each Workshop, the PowerPoint deck provided by CSI for display and presentation use at such Workshop as specified in Exhibit A.

1.2 “Handouts” means, with respect to each Workshop, the handouts, word documents, spreadsheets, charts and graphs provided by CSI for distribution to attendees at such Workshop as specified in Exhibit A. These materials are provided in electronic form and are the responsibility of the Licensee to print.

1.3 “Workshop Trainer Guide” means, with respect to each Workshop, the instructor’s manual or guide and the exercise facilitation and debrief instructions provided by CSI for such Workshop as specified in Exhibit A.

1.4 “CSI Practices” means the practices and techniques as provided by CSI in connection with the Workshop.

1.5 “Trainer Certification Process” means the process specified by CSI for assessing a thorough understanding of the practices and techniques taught in the Workshop, which may include, but is not limited to, successful completion of training with CSI or its designated agent.

1.6 “Trainer” means an individual designated by CSI who has completed the Trainer Certification Process for a Workshop respectively, listed in Exhibit A.

1.7 “Logos and Trademarks” means any trademark owned or controlled by CSI, including without limitation CSI, The Consortium for Service Innovation, KCS, Knowledge-Centered Service, Knowledge-Centered Support, The KCS Academy, KCS Verified, KCS Aligned, any additional trademarks identified in Exhibit A, and all accompanying and related logos.

1.8 “Workshop” means a workshop as specified in Exhibit A.

1.9 “Workshop Materials” means the Workshop Trainer Guide, Display Materials and Handouts, Supplemented Display Materials and Supplemented Handouts.

## **2. License.**

### **2.1 Grant of License.**

(a) Subject to Licensee’s compliance with the terms and conditions herein, CSI grants to Licensee a non-exclusive, personal and nontransferable (with no right to sublicense) license, during the term of this Agreement, to use the Logos and Trademarks in connection with the promotion, marketing, offer, conduct and provision of Workshops and to identify the Workshop Materials.

(b) Subject to Licensee’s compliance with the terms and conditions herein, CSI grants Licensee a nonexclusive, personal and nontransferable (with no right to sublicense) license, during the term of this Agreement, to:

(i) reproduce and use the Workshop Materials for each Workshop for Licensee’s own use in training and preparing for such Workshop;

(ii) add to, or combine with, the Display Materials and Handouts complementary training/educational material or supplemental information in the nature of examples and incremental experience, but without modifying the original definition and scope of the practices model or the definitions of the practices themselves. Such supplemented Display Materials and Handouts are hereafter referred to respectively as, “Supplemented Display Materials” and “Supplemented Handouts”;

(iii) display the Display Materials for each Workshop and, subject to Section 3.2, corresponding Supplemented Display Materials to attendees at such Workshop; and

(iv) reproduce and distribute Handouts for each Workshop and, subject to Section 3.2, Supplemented Handouts, in each case in hard copy form (e.g., paper and printed materials) or pdf only, to attendees at such Workshop. Any updates and/or upgrades to the Workshop Materials that Licensee may receive from CSI will be governed by the terms and conditions of this Agreement. However, CSI has no obligation to create any such updates or upgrades and can do so solely at CSI’s discretion.

## 2.2 Requirements and Restrictions.

(a) The Workshops covered by this Agreement are listed in Exhibit A, as it may be updated from time to time as agreed to by the parties. For the avoidance of doubt, only those Workshops which include the date of certification of the Trainer and the signature initials of both the Trainer and the CSI representative for each specific Workshop the Trainer is certified to teach (the “Verification”) are covered by this Agreement.

(b) Workshops covered by this Agreement may only be delivered by a Trainer as designated by CSI in Exhibit A. The specific Workshops for which the Trainer is certified to teach are to be listed in Exhibit A. A Trainer may not teach any Workshops for which the Verification is not complete.

(c) Licensee will not display the Display Materials (or Supplemented Display Materials) outside of applicable Workshops, and will not distribute any Handouts (or Supplemented Handouts) other than to individual attendees at the applicable Workshops. Licensee will not sublicense any of the rights granted herein or attempt to grant other rights to the Workshop Materials or Logos and Trademarks to any third party.

(d) For each Workshop, Licensee will use, display, print and distribute the applicable Workshop Materials, as may be modified by CSI from time to time, in the conduct of such Workshop to the extent licensed under Section 2.1.

(e) Licensee will not delete, remove, modify, obscure, fail to reproduce or in any way interfere with any proprietary, trade secret, or copyright notice appearing on or incorporated in any Workshop Materials. Licensee will use the titles of the respective Workshops and Workshop Materials and the Logos and Trademarks to identify or refer to the Workshops and Workshop Materials at all times and will not create, develop or use any other Logos or Trademarks or names in connection with the Workshops or Workshop Materials without CSI’s prior written approval.

(f) Licensee shall not use, register or attempt to register any company name, product name, domain name, user name, email address or URL incorporating any Logos or Trademarks or any word or combination of letters similar to any Logos or Trademarks.

(g) Trainers must provide at least two (2) Workshops, each of which must be at least one (1) day in length, within a twenty four (24) month period for each category of workshop for which they are a Trainer.

## **3. Quality Control.**

3.1 Workshops. Licensee will prepare, offer, promote, market, conduct, provide and sell the Workshops and will use the Logos and Trademarks only with Workshops offered by Licensee that comply with the CSI Practices. Licensee will always maintain the quality of the Workshops at a level specified by and satisfactory to CSI. Licensee will permit CSI to attend and inspect the Workshops, Workshop Materials, Marketing Materials and/or the use of Logos and Trademarks at all reasonable times

and on prior written notice.

3.2 Supplemented Workshop Materials. If requested by CSI, Licensee will submit to CSI copies of all Supplemented Display Materials and Supplemented Handouts that Licensee intends to display or distribute. The quality of the Supplemented Display Materials and Supplemented Handouts will be deemed acceptable to CSI unless specific objection is given to Licensee within two (2) weeks of the time of inspection.

3.3 Marketing Materials. Licensee will submit to CSI representative samples of advertisements and promotions, brochures, event announcements and other materials that display or that Licensee intends will display any Logos and Trademarks (“Marketing Materials”) and all material changes to any Marketing Materials for CSI’s review. The quality of Marketing Materials will be deemed accepted only upon the written approval of CSI, and Licensee will use the Logos and Trademarks only with such Marketing Materials specifically approved in writing by CSI, which may be via email.

#### **4. Non-compete.**

4.1 Licensee agrees not to offer or deliver workshops from other sources or to create their own workshops that in whole or in part use the materials covered by this Agreement or curriculums for which CSI has licensable offerings without prior written approval from CSI. Workshops the Licensee offers that existed prior to the effective date of this agreement and include materials covered by this license must be reviewed by CSI for non-compete compliance.

4.2 Licensee agrees not to sell Workshop Materials or any derivative works of any of the Display Materials (or Supplemented Display Materials), Handouts or Workshop Trainer Guides.

4.3 Licensee agrees not to distribute Workshop Materials or derivative works of any of the Display Materials (or Supplemented Display Materials), Handouts or Workshop Trainer Guides to anyone who is not a Trainer authorized to teach the Workshop.

#### **5. Use of Logos or Trademarks.**

5.1 Licensee will only use the Logos and Trademarks to identify, label and promote Workshops and Workshop Materials that comply with the CSI Practices and which are covered by this Agreement. Except for such identification, Licensee will not at any time do, or cause to be done, any act or thing in any way which may suggest, directly or indirectly, that (a) CSI endorses, approves or sponsors Licensee or any other products or services of Licensee, including without limitation, any judgment or determination by CSI with respect to Licensee’s Workshops relative to any other party or workshops with which CSI has authorized use of the Logos and Trademarks; or (b) that Licensee is for any purposes an agent of CSI.

5.2 Licensee will comply with CSI’s instructions and directions regarding the use, appearance and placement of Logos and Trademarks, including without limitation, any style guide or Logos or Trademarks usage guidelines that may be provided or updated by CSI from time to time.

5.3 The Logos and Trademarks will further be used only in conformance with the following guidelines: (a) the Logos and Trademarks are proper adjectives and should be followed by generic terms, (e.g., KCS® training); (b) the Logos and Trademarks should not be pluralized; (c) the Logos and Trademarks should not be used in the possessive form (e.g., do not use “KCS’s training); (d) the Logos and Trademarks are never verbs; and (e) the Logos and Trademarks should always be set off from surrounding text by using initial capital letters, all capital letters, quotation marks, italics or other different type font.

5.4 Licensee will not alter the nature or design of the Logos and Trademarks in any way and will not use the Logos and Trademarks in the creation of a composite trademark or associate it with another trademark or name used by Licensee, unless prior written consent is obtained from CSI.

5.5 Except as explicitly authorized by this Agreement, or other agreements between CSI and Licensee, Licensee shall not use any CSI Trademarks – including without limitation as part of the name or designation for any Licensee product, service, web site, community or other offering – without prior written permission from CSI.

## **6. Royalty Payments.**

6.1 Royalties. In consideration of the licenses and rights granted herein, Licensee will pay CSI or, if so directed by CSI, its affiliate the KCS Academy, a royalty (“Royalty”) as specified in Exhibit A for each individual registered and attending each Workshop.

6.2 Reporting. Unless otherwise agreed to by CSI, Licensee will report each Workshop that it conducts to CSI within five (5) days of completion of such Workshop. The report must include the number of registrants and attendees.

6.3 Invoices and Payment. CSI, or its affiliate the KCS Academy, will invoice Licensee for Royalties accrued, and unless otherwise agreed to by CSI, Licensee will pay invoices within 30 days of invoice date. All amounts past due will bear interest at the lesser of one and one-half percent (1.5%) per month or the highest interest rate allowable under applicable law.

6.4 Books and Records. Licensee will prepare and maintain complete and accurate books and records sufficient to verify its compliance or non-compliance with its payment and other obligations under this Agreement. During the term of this Agreement and for a period of one (1) year thereafter, CSI will have the right to audit, inspect and copy those books and records maintained by Licensee at all reasonable times and on prior written notice. If the audit establishes an underpayment to CSI, then Licensee will promptly pay CSI or, if so directed by CSI, its affiliate the KCS Academy, the amount of the underpayment plus interest from the date past due and reimburse CSI for the cost of the audit.

## **7. Disclaimers; Limitation of Liability.**

7.1 THE WORKSHOP MATERIALS AND LOGOS AND TRADEMARKS ARE PROVIDED “AS IS,” WITHOUT WARRANTY OF ANY KIND. CSI DISCLAIMS ALL WARRANTIES, EITHER EXPRESS OR IMPLIED, WHETHER ARISING BY OPERATION OF LAW, COURSE OF DEALING, COURSE OF PERFORMANCE, USAGE OF TRADE OR OTHERWISE, INCLUDING BUT NOT LIMITED TO WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NONINFRINGEMENT.

7.2 IN NO EVENT WILL CSI BE LIABLE FOR ANY CONSEQUENTIAL, INDIRECT, SPECIAL, OR INCIDENTAL DAMAGES (INCLUDING WITHOUT LIMITATION DAMAGES FOR LOST PROFITS OR BUSINESS INTERRUPTION) ARISING OUT OF THIS AGREEMENT OR THE USE OR INABILITY TO USE ANY WORKSHOP MATERIALS OR LOGOS AND TRADEMARKS, EVEN IF CSI HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. IN NO EVENT WILL CSI’S AGGREGATE LIABILITY FOR ALL DAMAGES RELATED TO THIS AGREEMENT, WHETHER UNDER ANY CONTRACT, NEGLIGENCE, STRICT LIABILITY OR OTHER LEGAL OR EQUITABLE THEORY, EXCEED THE ROYALTIES PAID BY LICENSEE TO CSI IN THE MOST RECENT TWELVE (12) MONTHS OF THE AGREEMENT.

**8. Indemnity.** CSI assumes no liability to Licensee or to third parties with respect to the Workshops prepared, offered, promoted, marketed, conducted, provided and/or sold by Licensee or the use, display or distribution of the Logos and Trademarks, Workshop Materials or Marketing Materials. Licensee agrees to indemnify, defend and hold harmless CSI and its officers, directors, employees, agents, contractors, volunteers, co-authors and licensors from any and all claims, actions, losses, liabilities, damages, costs and expenses (including without limitation attorneys’ fees) resulting from or incidental to (a) Licensee’s negligence or willful misconduct, or (b) Licensee’s breach of this Agreement, including any

representation, warranty or covenant hereunder. Licensee will not settle any such claim or action without CSI's prior written consent. CSI may participate in the defense or settlement of the claim at its own expense with counsel of its choosing. The foregoing obligations do not apply to the extent that any Logo or Trademark infringement claim is based on Licensee's use of the Logos and Trademarks as permitted under, and in accordance with the requirements of, this Agreement or any copyright infringement claim based on the use of the Workshop Materials (excluding the Supplemented Display Materials and Supplemented Handouts) as permitted under, and in accordance with the requirements of, this Agreement. Licensee agrees to carry a general insurance policy with limits of at least One Million Dollars (\$1,000,000) per occurrence.

## **9. Term and Termination.**

9.1 Term. Except as otherwise provided herein, this Agreement will remain in full force and effect with respect to each category of Workshop until twelve (12) months after a new, major release of that category of Workshop as set forth in Exhibit A. CSI will provide reasonable notice of the release of a new version of a licensed Workshop, including the date of the new release triggering the beginning of the twelve (12) months so that the parties can discuss updating this Agreement as appropriate when the next release becomes available. As clarification, if this Agreement applies to more than one category of Workshop, a new, major release of one category of Workshop will not affect the enforceability of this Agreement as it relates to any other category of Workshop.

9.2 Insolvency. CSI may terminate this Agreement in the event that Licensee: (a) applies for or consents to the appointment of a receiver, trustee, or liquidator for all or a substantial part of Licensee's assets; (b) is unable to, or admits in writing its inability to, pay its debts as they mature; (c) makes a general assignment for the benefit of creditors; (d) 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 (e) 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, will 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 will be a material breach of this Agreement.

9.3 Breach. CSI may terminate this Agreement upon thirty (30) days prior written notice if the Licensee is in material breach, or in the case of nonpayment thirty (30) days prior written notice, of this Agreement and Licensee fails to remedy such breach to CSI's satisfaction within such notice period.

9.4 Immediate Termination. Notwithstanding Section 9.3, CSI may terminate this Agreement upon written notice to Licensee if (a) Licensee violates the scope or limitations of its license under Section 2 of this Agreement; (b) Licensee fails to comply with the quality control provisions of Section 3; (c) Licensee violates the scope or limitations of its license(s) to use any Logos and Trademarks, (d) Licensee uses any Logos and Trademarks without the express written permission of CSI; or (e) Licensee fails to comply with the non-compete provisions of Section 4.

9.5 Licensee Termination. Licensee may terminate this Agreement on sixty (60) days written notice to CSI.

### **9.6 Effect of Termination.**

(a) Upon termination of this Agreement for any reason, all rights granted to Licensee hereunder will automatically terminate. Licensee will return or destroy, as directed by CSI, all Workshop Materials, Marketing Materials and other information and materials provided by CSI, in Licensee's possession or control. Licensee agrees to certify its compliance with the foregoing requirements upon CSI's request.

(b) CSI will not be liable to the other party for any damages or claims resulting from, or related to, termination or expiration of this Agreement in accordance with the terms hereof, including loss of goodwill, prospective profits or anticipated sales, or any expenditures, investments, leases or commitments made hereunder or for any other reason. Each party acknowledges and agrees that it has no expectation and has not received any assurances that its business relationship with the other party will

continue beyond the stated term of this Agreement or its earlier termination in accordance herewith.

## **10. Proprietary Rights.**

10.1 The Workshop Materials and Logos and Trademarks are protected by copyright, trademark and/or other intellectual property laws and are owned exclusively by CSI (and/or its licensors and co-authors, if any). Nothing in this Agreement will be construed or interpreted as granting to Licensee any rights of ownership or any other proprietary rights in or to the Workshop Materials and Logos and Trademarks or any modifications, translations or other derivative works or changes thereto, including any Supplemented Display Materials and/or Supplemented Handouts made by Licensee pursuant to this Agreement. Licensee will, at Licensee's own cost and expense, protect and defend CSI's (and/or its licensors and co-authors, if any) ownership of the Workshop Materials and Logos and Trademarks against all claims, liens and legal processes of Licensee's creditors and will keep the Workshop Materials and Logos and Trademarks free and clear of all such claims, liens and processes. ALL RIGHTS NOT EXPRESSLY GRANTED HEREIN ARE RESERVED TO CSI.

10.2 In connection with the use of the Workshop Materials and Logos and Trademarks, Licensee will not in any manner represent that it has any ownership in the Workshop Materials and Logos and Trademarks or any registration or applications therefor. Licensee acknowledges that all uses of the Logos and Trademarks by Licensee will inure to the benefit of CSI.

10.3 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 Logos and Trademarks, to add additional elements to the Logos and Trademarks, or to discontinue use of some or all of the elements thereof. Accordingly, CSI does not represent or warrant that the Logos and 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 will be included as the Logos and Trademarks. In the event that CSI alters any Logos and Trademarks, or portion thereof, Licensee will, after written notice from CSI, promptly implement such modifications.

10.4 Licensee shall hold in confidence the Workshop Trainer Guides and any other nonpublic information provided by CSI pursuant to this Agreement (collectively "Confidential Information"), shall not use or disclose to any third party, and shall take all necessary precautions to secure the Confidential Information. In accordance with this provision, Licensee shall maintain at least the same precautions as it takes in regard to its own confidential information. Licensee's disclosure of such information shall be restricted to its employees who have a need to know for Licensee's performance under this Agreement and who have been advised of their obligation with respect to Confidential Information. If Licensee has any questions as to what comprises such Confidential Information, Licensee shall consult with CSI.

10.5 Because of the unique nature of the Workshop Materials, Logos and Trademarks and Confidential Information, Licensee understands and agrees that CSI will suffer irreparable injury in the event Licensee fails to comply with any of the terms of this Agreement and that monetary damages may be inadequate to compensate CSI for such breach. Accordingly, Licensee agrees that CSI will, in addition to any other remedies available to it at law or in equity, be entitled to injunctive relief, without posting a bond, to enforce the terms of this Agreement.

**11. Publicity.** Licensee may, with CSI's prior written consent, issue a press release indicating that Licensee holds a Trainer designation. 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. CSI may use Licensee's name to publicly disclose and identify Licensee has achieved a Trainer designation, including without limitation on its website and in promotional and other materials.

## **12. General.**

12.1 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. 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 will be null and void. The Agreement will be binding upon and inure to the benefit of the parties hereto and their respective successors and assigns.

12.2 The parties have read this Agreement, including Exhibit A which is incorporated herein by reference, 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 Workshops. No supplement, modification, or amendment of this Agreement will be binding, unless agreed upon in writing by the parties.

12.3 This Agreement will be governed in all respects by the law and statutes of the State of Washington without regard to its conflicts of laws principles. The exclusive jurisdiction and venue of any action under this Agreement will be in the state and federal courts of King County, Washington. Licensee hereby accepts the personal jurisdiction of such courts.

12.4 All notices and requests in connection with this Agreement will be in writing and sent via email or recognized commercial messenger or delivery service. Notices will be deemed received upon written email reply or confirmation of delivery or signing for receipt of delivery if sent by messenger or delivery service. Notices will 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.

12.5 Nothing in this Agreement will 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 will have the right, power, or authority to act or to create any obligation, express or implied, on behalf of the other.

12.6 If any provision of this Agreement, or portion thereof, is found unenforceable, that provision of the Agreement will be enforced to the maximum extent permissible so as to effect the intent of the parties, and the remainder of this Agreement will continue in full force and effect. Failure by either party to enforce any provisions of this Agreement will not be deemed a waiver of future enforcement of that or any other provision.

12.7 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 4, 5, 6, 7, 8, 9, 10 and 12.

12.8 No waiver of any breach of any provision of this Agreement will constitute a waiver of any prior, concurrent or subsequent breach of the same or any other provisions hereof, and no waiver will 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: \_\_\_\_\_



## EXHIBIT A

### Workshops

The following are the current categories of Workshops covered by this license agreement and their corresponding Royalties for Workshop registrants and attendees. The specific Workshops, their corresponding Workshop Materials, and their corresponding Royalties may be updated by CSI from time to time, including upon the release of a new version of the Workshops. CSI will notify Licensee of any such updates or other changes and will provide copies of the updated Workshop Materials. Licensee will promptly discontinue use of any superseded or replaced Workshop Materials.

#### Category 1: KCS Workshops

Trainers certified to teach KCS Workshops are known as “KCS Certified Trainers”.

Date Certified	Trainer Initials	CSI Initials	Workshop Name	Royalty/Attendee
			KCS v6 Practices Workshop, ½-1 day	\$35
			KCS v6 Practices Workshop, 1½-3 days	\$100
			KCS v6 Leadership Workshop, 1 day	\$35
			KCS v6 Leadership Workshop, 1½-2 days	\$100
			KCS v6 Design Session Workshop, 3-5 days	\$125
			KCS v6 Practices and Design Session Workshop (in conjunction), 3-5 days	\$125
			KCS v6 KDA Workshop, 1 day	\$35
			KCS v6 KDA Workshop, 1½ -2 days	\$100

#### Category 2: Intelligent Swarming Workshops

Trainers certified to teach Intelligent Swarming Insights Workshops are known as “Intelligent Swarming Insights Trainers.” Trainers certified to teach Intelligent Swarming Design Session are known as “Intelligent Swarming Architects.”

Date Certified	Trainer Initials	CSI Initials	Workshop Name	Royalty/Attendee
			Intelligent Swarming Insights Workshop, ½-1 day	\$35
			Intelligent Swarming Insights Workshop, 1½-2 days	\$100
			Intelligent Swarming Design Session, 3-5 days	\$125