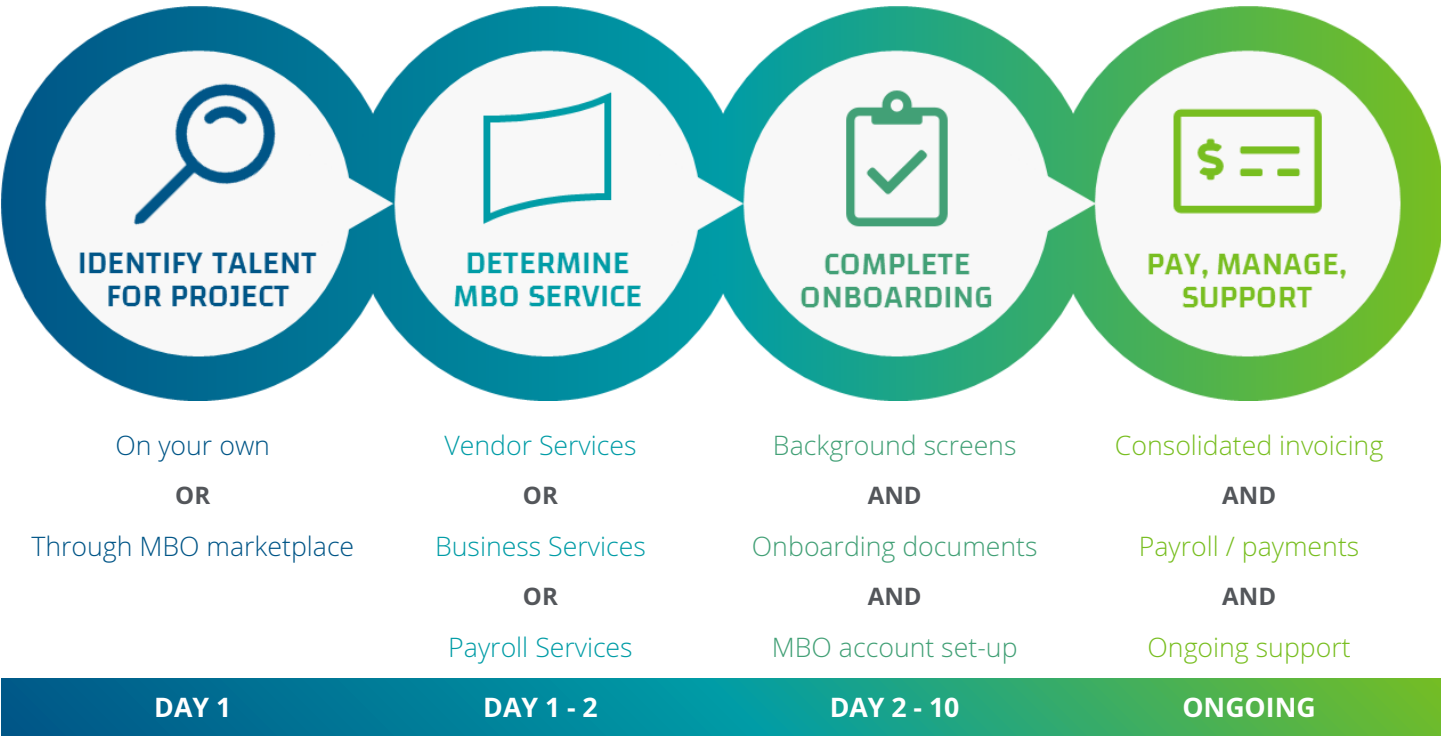


Engagement Lifecycle Process Summary

MBO Partners, through our comprehensive independent workforce, solution supports Cisco throughout an independent’s entire engagement lifecycle. This document explains the processes behind the four key areas of our solution: finding the right workers, determining the best way for them to engage, helping them complete their onboarding requirements, and handling all ongoing financial administration and support.



* Timing expectations above are approximate and may vary due to the worker’s responsiveness to MBO’s onboarding instructions and the selected engagement service.

For example, workers who engage through Payroll Services often complete onboarding within one day of service determination, while the Business Services process may take up to 10 days due to business establishment requirements. Background screenings and Cisco-specific onboarding requirements also factor into overall onboarding timing.

The sections that follow provide step-by-step explanations of each area of the engagement cycle.



COMPLETED BY
CISCO MANAGERS

TALENT SOURCING AND REFERRAL

► **Note:** MBO provides our engagement services for talent whom Cisco managers identify internally and refer to us.

1. Source the right independent talent for your project directly (i.e., outside of the Cisco staffing network/process). Examples of how to direct source talent include:
 - On your own, using talent you know and trust.
 - Using the MBO marketplace, through which clients create an easy-access community of proven independent talent.
 - Using MBO's Advisory Services, which provide a full-service independent workforce sourcing solution.
2. Refer the talent to MBO by completing this [referral form](#).
3. Complete all the red areas of ONE of the following two SOW templates:
 - [Managed Project](#) (if the project is deliverable-based)
 - [Managed Service](#) (if the project is SLA-based)

For further guidance on completing the SOW, please refer to this [MBO / Cisco FAQ](#).

The day you refer the talent to MBO and complete the SOW is considered **Day 1** of the engagement process summarized in the sections that follow.



COMPLETED BY
MBO

MBO ENGAGEMENT SERVICE DETERMINATION

► **Note:** Because no two independent workers are alike, MBO offers three services—**Vendor Services**, **Business Services**, and **Payroll Services**—to ensure an engagement experience ideally suited to each workers' unique characteristics.

1. MBO directs the talent to complete our proprietary online Engagement Questionnaire.
Timing: Day 1
2. MBO reviews the questionnaire responses and, if necessary, conducts a personal consultation with the talent to fill in gaps or clarify ambiguities.
Timing: Typically Day 1 or 2 (subject to the talent's responsiveness)
3. Based on the above, MBO determines the engagement service that best fits the talent's experience, preferences, business structure, and vendor qualification status.
Timing: Typically Day 1 or 2 (subject to the talent's responsiveness)



COMPLETED BY
**THE TALENT
YOU REFER**

ONBOARDING

► **Note:** MBO monitors each referral's progress in completing the onboarding steps and provides regular reminders to avoid delays.

1. MBO provides the talent a detailed list of onboarding steps that include Cisco-specific tasks (immediately below). Candidates for Business Services or Vendor Services also complete qualification or business-related tasks (further below). In most cases, talent can complete both sets of tasks concurrently.
Timing: Immediately upon service determination
2. The talent undergoes a Cisco-required background check.
Timing: Typically launched on Day 2 or 3 with results four to five days later
3. The talent completes any appropriate Cisco-required onboarding documents.
Timing: Typically Day 2 or 3
4. The talent completes a Federal I-9 form (W-2 engagements only).
Timing: Typically Day 2 or 3
5. The talent creates an account in the MBO system and signs the appropriate agreement with MBO.
Timing: Typically Day 2 or 3

Business-related tasks: Vendor Services

1. MBO instructs vendor candidates to send us business documentation (Articles of Incorporation, Form W-9, proof of other clients, marketing examples, etc.).
Timing: Typically begins on Day 2 and often takes two to four days; can occur concurrently with remaining onboarding steps
2. MBO evaluates the talent's business for vendor qualification, including business documentation review, insurance confirmation, and ensuring adherence to qualification criteria. Non-qualified talent engages through Business Services or Payroll Services.
Timing: Within one business day of receiving the business documentation

Business-related tasks: Business Services

1. If the talent already has a company, MBO requests and reviews supporting documentation (Articles of Incorporation, Form W-9, proof of other clients, marketing examples, etc.). Non-qualified talent engages through Payroll Services.
Timing: Typically begins on Day 2 or 3 and often takes two to four days; can occur concurrently with remaining onboarding steps
2. If the talent does not have a company, MBO assists with establishing a new compliant business. This may include filing the business with state agencies, securing a Federal EIN number, and more.
Timing: Typically begins on Day 2 or 3; business creation can take up to two weeks; can happen concurrently with remaining onboarding steps



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ONGOING PAYMENTS, MANAGEMENT, AND SUPPORT

1. MBO confirms completion of all onboarding activities and notifies you that the MBO onboarding process is complete. (Note: Cisco may require the completion of additional non-MBO-related tasks before the project may begin.)
Timing: Within one business day of completion of the steps above
2. MBO provides the talent with detailed instructions for submitting hours, milestones, deliverables, and/or expenses.
Timing: Concurrent with step 1 above
3. MBO sends Cisco an invoice that consolidates approved labor and expense submissions for everyone engaged through MBO.
Timing: Each Week
4. As they work, MBO provides talent their labor payments and reimburses Cisco-billable expenses.
Timing: Payment timing varies by engagement service. See the grid below.
5. For talent engaged through Vendor Services or Business Services, MBO monitors each business's adherence to appropriate eligibility requirements.
Timing: Ongoing throughout the entire engagement
6. MBO's experienced support professionals are standing by to answer talent's questions, resolve issues, notify talent of program changes or upcoming events, and provide guidance related to getting the most from their independent practices.
Timing: Ongoing throughout the entire engagement

PAYMENT TIMING EXPECTATION

Vendor Services or Business Services	After invoicing (step 3 above) as well as a 30-day holding period, Cisco pays MBO at the end of each month. We then pay talent in the next weekly payroll cycle. As such, talent in these services can expect to receive their payments about 35 to 65 days after invoicing, to account for payment processing. See the Cisco Payment Calendar for details.
Payroll Services	MBO pays talent engaged through Payroll Services on Fridays, two weeks after a given work week (or one week if required by state law).