MITECH PARTNERS, LLC

CLIENT ENGAGEMENT MODEL & EXECUTION

VERSION 1.00 – FEBRUARY 2018

mitech

CONFIDENTIALITY STATEMENT

All information that is contained in this document is confidential and proprietary in nature. This document may not be distributed, edited, copied, or shared with anyone outside of the Mitech Partners, LLC organization without the written consent of Mr. Bill McCleskey, Founder. Information contained within this document may include strategic initiatives, processes, procedures, and other core tasks that can be severely impacted when unauthorized distribution of said item is executed.

It is agreed upon once opened, the user(s) that access this document will assume full liability and protect all information that is not for public consumption as proprietary and confidential. In the event of unauthorized release which may include, at a minimum, disciplinary action and up to termination of partnership, employment, civil, and/or criminal penalties.

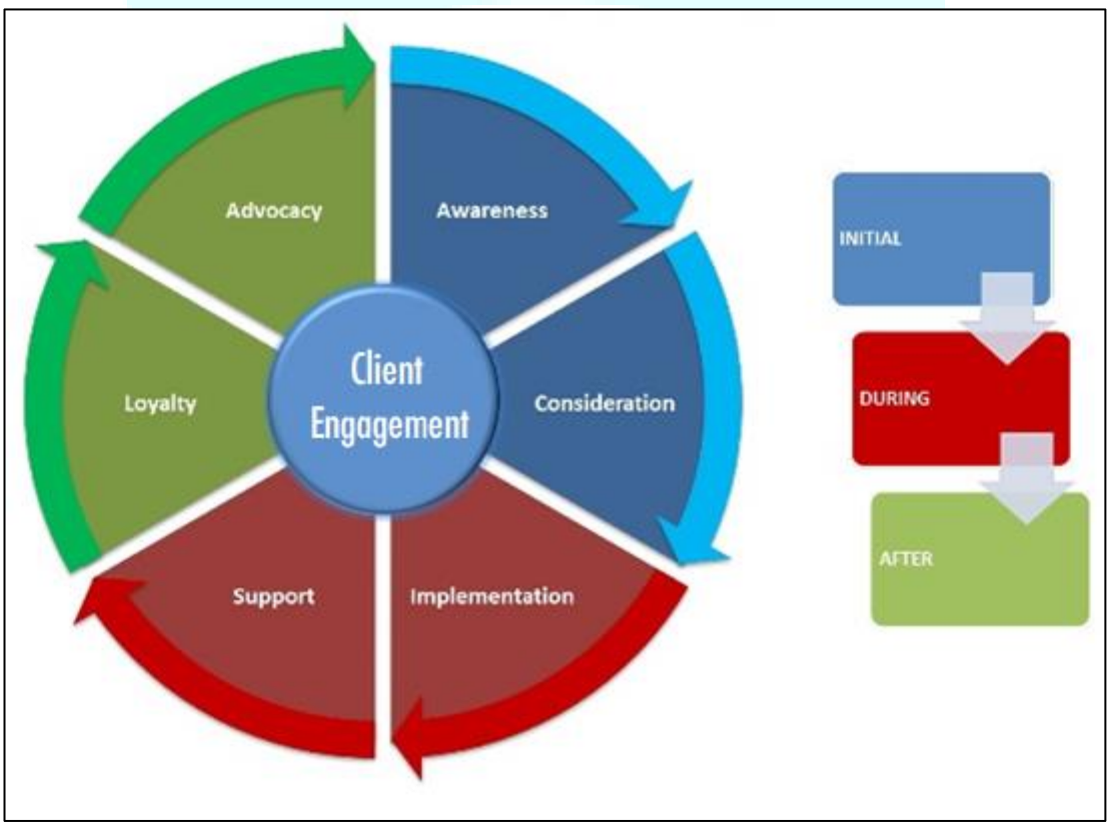
CLIENT ENGAGEMENT MODEL & EXECUTION

Though the main reason why Mitech Partners, LLC is in business is to obviously generate revenues and profits from them, what is the one source these come from? Clients of course! This training document reviews the Client Engagement Model and how we can use it to flawlessly execute our sales strategy and have them for life. As of result, the goals and objectives of this training are as follows:

- Understand the purpose Client Engagement Model and why it is important to execute the model with every client past, present, and in the future
- Briefly review the 4 A's of Client Experiences
- Benefits of the strategy to the company, partners, and you

Client Engagement Model

The goal of the Client Engagement Model is to ensure that the time spent with each client we serve is consistent, positive, and always focused on them. The model focuses on the relationship building process well before they become a client of Mitech Partners, LLC. As shown below, there are three (3) initial phases of the Client Engagement model.



Initial Conversations

When looking for new clients and trying to build the funnel, initiating conversations is the most important activity that should be executed early in the engagement process. This can be done through calling prospects on the phone, sending out email messages, reviewing catalogs or industry specific publications, and so on. Networking events are also great ways to get the ball rolling to get contacts and help fill the funnel.

When trying to find the best contacts that could become new clients for the company, here are a couple of things to consider:

- Are you aware of the product offerings that Mitech provides their clients and can present it in a 30-second elevator speech?
- When talking to a potential client, are the persons you're talking to decision makers for their company and if not, are they able to provide that information to us?
- Applying the information, you received from them, will they be a great fit for the company?

Conversations at this stage of the process shouldn't be exhaustive and long. Rather, they should be short and ones that take at most a couple of minutes of one's time. Remember, the idea here is to prospect and then follow-up on them later (which is the next phase of the model.

During the Prospecting Process

Now that you have some persons expressing interests in the opportunity to become a client at Mitech Partners, LLC, what is the next thing to do? Naturally is to give them a call and reach out to them. However, one of the biggest challenges in this part of the process is to maintain contact with the prospects. It is very uncommon that you will get a sale on the first call. The goal is to keep in contact with them without coming off as pushy, desperate, or nervous.

Here at Mitech, the client experience is extremely important to our business and we have developed a contact strategy that new sales team members and partners should use when trying to get new clients on board. Though results will vary as clients may be busier than others in comparison, here are some good rules of thumb for contacts:

- Always contact prospective clients at least twice a week but NO MORE than three (3) times a week by phone.
- With respect to email messages, unless communicating directly with the client, contact them via this method no more than twice in a calendar week.

- Note: It is best to always contact prospective clients by phone FIRST and then email second. This is unless they prefer email and not phone calls.

When attempting and/or successfully making contacts with prospective clients, ALWAYS LEAVE DETAILED NOTES in the back-office file. That way the next time you interact with the client, (or if someone else contacts them), they will be able to know what has been done.

After the Prospecting Process

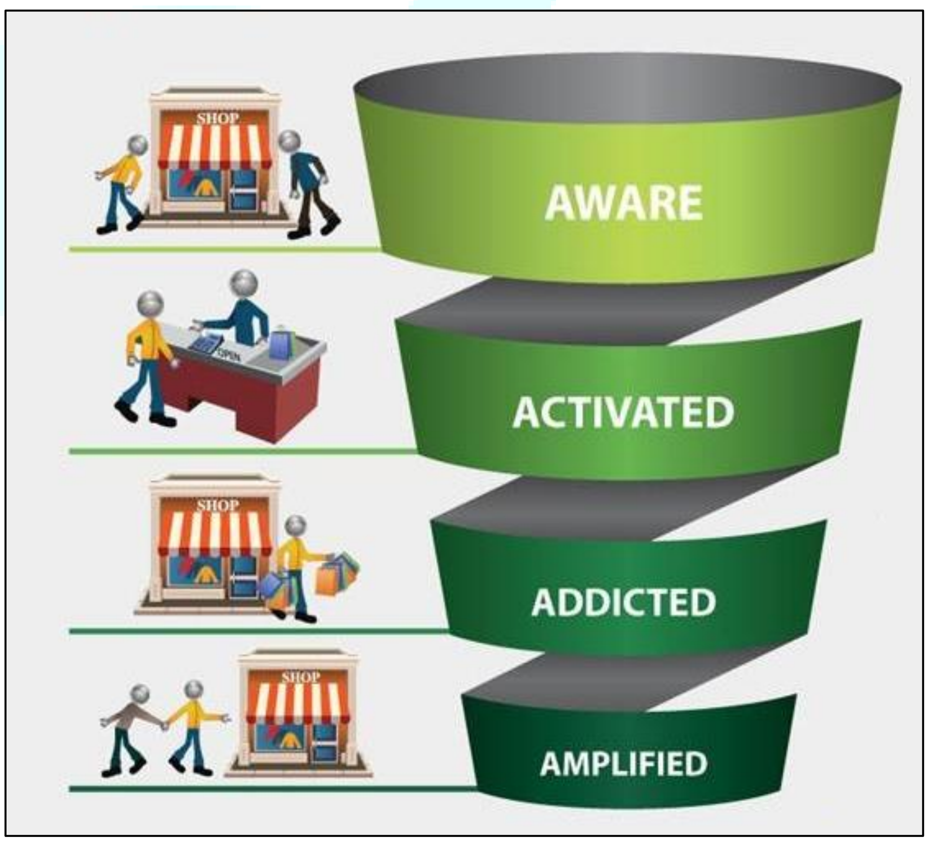
Once the clients that were prospected become a part of the Mitech Partners, LLC family, it is important to keep in contact with them to ensure the solution provided not only met expectations but exceeded them as well. The communication after the fact will help gain trust in the company as well as provide an opportunity for us to provide additional services for them in the future and/or an opportunity for them to pass on new leads. In short, they become advocates of the brand and help spread good news about the company to others.

As part of our communication strategy, we will send out strategically-timed messages to clients periodically to ensure that we are there for them and are only a phone call or email away. Additionally, it is to offer opportunities to welcome new services we will offer and when appropriate, highlight new team members that have come aboard. Emails that are sent to the entire client base are timed commonly once every couple of weeks to at most once a month.

Four (4) A's of Client Experience

So why is it important to engage the clients regardless if they are a first-time client of ours or one that has been with us since the day we opened the doors? It all comes down to the Four (4) A's of Client Experience Theory.

This theory is a good way to visualize your sales funnel. Although there are many leads that come into our business, we must be aware of them. Action must be taken on those leads as quickly as reasonably possible so that we can activate the customers into a positive buying decision.



Ones that decide to come aboard see the benefits of the services we provide and as of a result, they become addicted to the brand. As they continue to experience the top-notch services we provide, this is amplified though their testimonials, word of mouth conversations with fellow business owners and networking groups they attend, and so on. Communication throughout the process is realistically the biggest kicker here to ensure that the most clients that are at the top of the funnel make it to the bottom to exponentially grow the brand.

As you'll see in the final section of this training document, there are many benefits to executing this model.

Benefits of the Client Engagement Model

One of the main goals we have here at Mitech Partners, LLC is to ensure that the clients we have get the best possible experience before, during, and after a signed agreement. There are many benefits that come about executing the client engagement model that one should know about. Other than being a part of one's job duties when prospecting, here are ones that make the cut:

- Stronger client relationships that will require limited or no additional interaction outside of general inquiries and health check-ups
- Deeper client base which can share our successes and their positive experiences with others.
- Higher number of client opportunities and deeper funnels for all sales team members and partners
- More opportunities for one-time and MRC commission payments, spiffs, and bonus opportunities.
- Growth opportunities in the company including leadership opportunities
- And more.

Conclusion

Remember, it is very important to understand the Client Engagement Model and why it is important to the success of Mitech Partners, LLC. As we reviewed, initially engaging with potential clients, following up with them, and taking care of them once the services have been installed are the three (3) core phases that the model goes through with each client we talk to. Regardless it is over the phone or via an email message exchange, constant communication ensures that our clients aren't just another number in the file. The benefits of using this strategy are virtually limitless because together everyone achieves more and we are one team with a dream envisioning client success for everyone we take time to talk to.