

MITECH PARTNERS, LLC

HOW TO SEND LEADS TO THE HOME OFFICE

VERSION 1.00 – FEBRUARY 2018



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.



QUICK START TO SUCCEEDING AT MITECH PARTNERS, LLC

At Mitech Partners, LLC, partners and team members alike may have leads that they would like to share or need assistance with to successfully close and complete. The following job aid and instructions below provide three (3) ways to pass on leads to the home office. Note that it is recommended to first attempt to complete the order yourself but if you have many leads that need processed, called upon, or ordered, don't delay, review these options below today!

Option One – Text Lead Submissions

As part of our continued offerings to provide unique alternatives to the standard quo of calling in, we provide Order Texting Services to our partners. This feature is great for transactions that may need to be pushed through as quickly as possible and/or by request of the prospective client. This practice should be used for RESIDENTIAL CUSTOMERS only because all business transactions **MUST** go through the back office online portal.

TEXT ORDER SUBMISSION – DIAL 615-249-5072 & GIVE THE FOLLOWING PIECES OF INFORMATION...

- ◆ Customer Name
- ◆ Address
- ◆ Phone
- ◆ Email
- ◆ Services Needed
 - If they are requesting a bundle, please note the number of TV outlets needing activated/installed
- ◆ Additional Information
 - Provide us if they have a carrier preference or one they wish to stay away from
 - Past-due or balances subject to collection to a carrier

This information will assist us in providing the fastest quote possible to the client and in the shortest amount of time.

Option Two – Phone Lead Submissions

PHONE ORDER SUBMISSION – DIAL 615-249-5072 & GIVE THE FOLLOWING PIECES OF INFORMATION...

- ◆ Customer Name
- ◆ Address
- ◆ Phone
- ◆ Email
- ◆ Services Needed
 - If they are requesting a bundle, please note the number of TV outlets needing activated/installed
- ◆ Social Security Number & Date of Birth (Residential Customers Only)

- ◆ Additional Information
 - Provide us if they have a carrier preference or one they wish to stay away from
 - Past-due or balances subject to collection to a carrier

This information will assist us in providing the fastest quote possible to the client and in the shortest amount of time.

Option Three – Email Lead Submissions

EMAIL ORDER SUBMISSION – DIAL 615-249-5072 & GIVE THE FOLLOWING PIECES OF INFORMATION...

- ◆ Customer Name
- ◆ Address
- ◆ Phone
- ◆ Email
- ◆ Services Needed
 - If they are requesting a bundle, please note the number of TV outlets needing activated/installed
- ◆ Social Security Number & Date of Birth (Residential Customers Only)
- ◆ Additional Information
 - Provide us if they have a carrier preference or one they wish to stay away from
 - Past-due or balances subject to collection to a carrier

This information will assist us in providing the fastest quote possible to the client and in the shortest amount of time.

If one chooses to do so, they are welcome to create leads in the back office. This is not a required practice but is helpful for the staff in the office to obtain information in an expeditious manner when the other options are not utilized. A benefit of utilizing this practice is that one will receive emails and correspondence on orders that are in progress and have been installed/completed. Also, the more details provided for an order, the higher the chance it will close quickly.

Note: For DirecTV customers ONLY, they are **REQUIRED** to put a credit/debit card on file even if there is no upfront cost. This is because DirecTV gives them all their equipment for free and will charge their card on file if the customer runs away with the equipment. So, it's merely a security measure for DirecTV. You may send the customer's CC# via the above methods or call it in. Either is fine.

