

MITECH PARTNERS, LLC

PRODUCTIVITY REPORT TRAINING

VERSION 1.00 – APRIL 2018



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PRODUCTIVITY DASHBOARD TRAINING

As part of the mission to grow the brand, Mitech Partners, LLC has instituted a productivity dashboard for core partners and team members. This dashboard is used to gauge engagement with current, former, and potentially new clients. This will be needed to continue to grow the brand forward and provide additional opportunities to be an integral part of the firm. The objectives of this training include:

- ◆ Explain what the productivity dashboard is and why it is being utilized
- ◆ Explain the purpose and what potential outcomes could come to be if utilized properly
- ◆ How to enter data into the dashboard

Fundamentals of the Productivity Dashboard

The productivity dashboard was created back in mid-2017 to track different key metrics that would likely yield to additional clients and revenues for Mitech Partners, LLC. Upon further review, it was decided that it needed revamped and a second version of the dashboard was created in April 2018. This Google Document is available to all core team members that would be conducting sales-related activities. Shown below is an example of a productivity dashboard for the month of April:

mitech		Productivity Dashboard					April 2018
Expectation For Sales Team is 100 Points Per Business Day							
Team Member Name	Emails Sent	Calls Made	Networking	Follow-Up	One-To-One's	Total Points	
Bill McCleskey	0	0	0	0	0	0	
Grady Ring	0	0	0	0	0	0	
Ann Ying	0	0	0	0	0	0	
Doug Trovinger	2.5	2	4	6	0	14.5	
Zack Ford	0	0	0	0	0	0	
Team Totals	2.5	2	4	6	0	14.5	
Total Points	14.5	Percent To Goal	0.69%				
Point Goal	2100						

Activities that are tracked vary from one personnel group to another. Details for each of the categories will be discussed further in a moment. For this version of the Productivity Dashboard, the following items are tracked:

Sales-Focused Team Members (Including Core Partners)

- ◆ Emails Sent To Clients – 1/2 point
- ◆ Phone Calls Made To Clients – 1 point
- ◆ Networking Events Attended – 2 points
- ◆ One-On-One Networking Sessions – 2 points
- ◆ Follow-Ups With Clients or Networking Professionals – 3 points

Emails sent to clients are ones that have a true business purpose and have potential impact on the business. Conversation threads like ones where a decision where to have the next meal is discussed is an example of one that would not count in the dashboard. However, if it is an email to set up a one-to-one meeting or follow-up, then that would be deemed acceptable. Phone calls are much in a similar fashion. Networking events attended is one of the most important components of the dashboard. To be consistent, one should attend a networking group at least twice a month (or monthly if that is how it is scheduled). These will lead to one-on-one networking sessions and follow-ups with potential clients and/or networking professionals.

TEAM GOAL = 100 POINTS ACCUMULATED PER DAY

The team goal is to accrue 100 points per day in the dashboard. This is a collective effort and no one person should do it themselves. Rather, everything achieves more together by doing their part to get to the magic number. The reasoning behind it is fairly simple. For each 100 points accrued, it is likely that a new client will come to Mitech Partners, LLC. Thus, the average monthly revenue they have is approximately \$500.00. If the goal is reached each day, then that will likely bring in an additional 21-23 new clients a month with an average monthly spend of at least \$10,500.00 or more. Note that this doesn't include other clients that are brought on outside of these activities. We'll get to the why on this policy in a couple of moments because we need to know how to use the dashboard first.

How To Use Productivity Dashboard

The productivity dashboard is a fairly easy-to-use document because all calculations are done for team members. Each month, a new productivity spreadsheet will be created to reflect the business days for that calendar month. Depending on the month, that may range anywhere from 19 to 23 business days. Holidays are purposefully excluded from the calendar as those are recognized by the business and the office will be closed.

Assigned tabs are located at the bottom of the spreadsheet as seen below in the sample graphic. Simply find one's name and enter the QUANTITY OF EACH TASK in columns D, E, F, G, and H. The 'Total Points' column at the end of far right automatically calculates the points for that specific team member or partner. Totals are also calculated at the bottom of the sheet. Totals at the bottom are copied into the main dashboard as shown above on the previous page of this training document.



Productivity Dashboard

April 2018

Expectation For Sales Team is 100 Points Per Business Day

Date	Fill in columns D - H only the number of each activity completed					
	Emails Sent	Calls Made	Networking	Follow-Up	One-To-One's	Total Points
04/02/2018	2	1	1	2	0	8
04/03/2018	3	1	1	1	0	6.5
04/04/2018						0
04/05/2018						0
04/06/2018						0
04/09/2018						0
04/10/2018						0
04/11/2018						0
04/12/2018						0
04/13/2018						0
04/16/2018						0
04/17/2018						0
04/18/2018						0
04/19/2018						0
04/20/2018						0
04/23/2018						0
04/24/2018						0
04/25/2018						0
04/26/2018						0
04/27/2018						0
04/30/2018						0
Monthly Totals	25	2	4	6	0	14.5
Emails equal 1/2 point						
Phone Calls equal 1 point						
Networking equals 2 points						
Follow-Ups equals 2 points						
One-To-One Conversations equal 3 points						

Each team member should take a moment out of their day (preferably towards the end so that it is fresh in their mind what they produced) to record the quantity of each statistic on the sheet. Failure to do this will result in inaccurate results not only for the team but oneself as well. Repeated offenses of this may include disciplinary action up to and including termination of employment or releasing as a partner of Mitech.

Should you have any questions regarding the Productivity Report, please see a member of the Executive Leadership team and they will be happy to assist you getting the statistics proper on the sheet. Thank you for all of your hard work!

