

MITECH UNIVERSITY

ONBOARDING PROCESS FOR NEW MITECH BUSINESS PARTNERS

VERSION 1.00 – FEBRUARY 2018



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ONBOARDING PROCESS FOR NEW MITECH BUSINESS PARTNERS

Once interest has been received from a potential new Mitech Partners, LLC business partner, it is the goal of the company to create a pleasant and warm initial experience. This is done so that partners feel welcome and an integral part of the business. It is also critically important to reduce the risk of new business partners cancelling their relationship with Mitech Partners, LLC prematurely. The goal of this training process is to achieve the following objectives:

- ◆ Ensure that all Mitech Partners, LLC Operations personnel can successfully create a new business partner and their credentials
- ◆ Provide positive initial experiences to new business partners
- ◆ Assist with any questions, concerns, and hesitations that commonly occur immediately upon sign-up.

Due to the impact to the bottom line of both the company and new business partners, it is critically important to follow this process carefully and not skip any steps in the process. Failure to do so will result in revenues lost for the company and commissions, spiffs, and other potential payments for the new business partners.

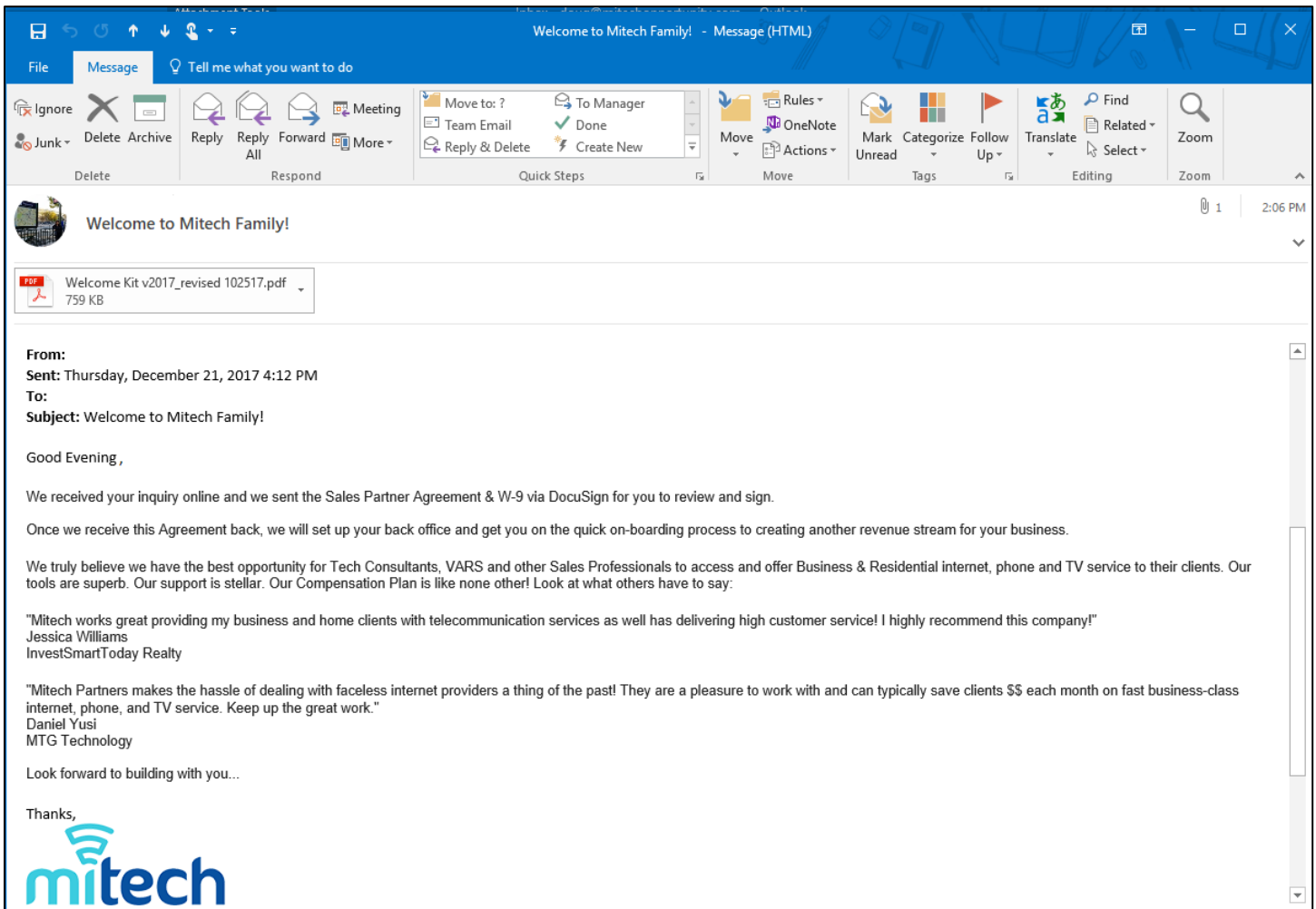
Part 1: Partner Documents

This part of the process focuses on the initial steps that must be taken once interest has been provided from a potential new business partner. It is assumed that the partner has already received, reviewed, and signed the MSP-Sales Partner Agreement & W-9 form and has been documented as them being received.

Step 1: Once approved by the Operations team, the welcome email is sent out to the new business partner which outlines general policies, procedures, and steps necessary for their partnership agreement to be successful. The welcome email includes a document which highlights the following items:

- ◆ Key websites to bookmark & residential cable call in number
- ◆ Mitech business back office & orders
- ◆ Residential order process
- ◆ Alarm & security orders
- ◆ Credit card processing orders,
- ◆ And more.

It is the responsibility of the new business partner to thoroughly review this document and provide confirmation they have received it and accept the contents wherein. A sample welcome email like what is shown below is what is sent and received:



Pro Tip: It is recommended to send out the welcome email no more than one (1) business day upon receipt of the MSP – Sales Partner Agreement & W-9 tax form to set a positive precedence for the new partner in the beginning stages of the partnership.

Part 2: Back Office Partner Signups

This part of the process focuses on creating a new user account in the Mitech Partners, LLC back office. Extra attention must be paid to these steps to ensure there are no errors or issues for new business partners logging into the back office.

Step 2: Access the Mitech Partners, LLC back office via the following URL: <http://www.mitechbiz.com>. Enter in the following credentials that are case-sensitive:

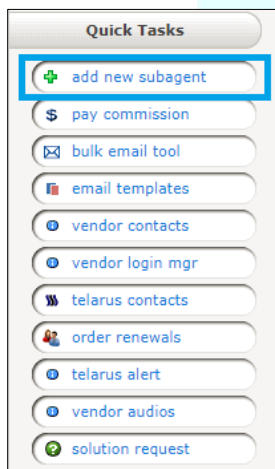
- ◆ **Username:** telecomjunkie
- ◆ **Password:** telarus2014

WARNING: DO NOT SHARE THE USERNAME OR PASSWORD WITH ANYONE OUTSIDE OF THE COMPANY! NO EXCEPTIONS!

Step 3: Once logged into the system, you will need to create a new account for the partner(s) that need signed up and given access into the system. This is shown below after the following step.

Step 4: After the link has been clicked, you will need to go through two (2) different steps to create an account. To start, you will the following information is required for the first step:

- ◆ Contact Name
- ◆ Business Name / Company Name
- ◆ Agent ID
 - *Recommended to have last name only plus zip code but if they have a preference, use that to ensure client satisfaction*
- ◆ Password
- ◆ Mailing Address, City, State, & Zip Code
- ◆ Phone Number
- ◆ Email Address
- ◆ Time Zone



A screenshot of the 'Add Subagent' form, step 1 of 2. The form is titled 'Add Subagent' and includes a sub-header 'add a new sub agent - step 1 of 2'. The form fields are: contact name (Bob Barker), business or company name (The Price Is Right), agent id (do not use spaces) (bbarker2018), password (bbarker2018), mailing address (7800 Beverly Blvd.), city | state | zip (Los Angeles | CA | 90036), phone number (5555555555), toll free phone number, fax number, email address (bbarker@someemail.com), and time zone (Central). A red asterisk indicates required fields. A 'Continue >' button is at the bottom right.


Pro Tip: Before continuing onto the next step, it is important to ensure that the information entered on this screen matches the W-9 form submitted by the partner. Complications will result with commissions and other back office tasks if the information doesn't match.

(Continues on the next page)

Step 5: Within the financial settings, the percentage **MUST BE CHANGED to 54%**. Unless instructed otherwise, this is the default amount for new partners to the business.

WARNING: IF THE PERCENTAGE IS CHANGED TO ANY OTHER AMOUNT OTHER THAN THE ONE LISTED ABOVE AND IS DISCOVERED, THE EMPLOYEE(S) THAT MADE THE CHANGE WILL BE SUBJECT TO DISCIPLINARY ACTION INCLUDING AND UP TO IMMEDIATE TERMINATION OF EMPLOYMENT. SIGNIFICANT FINANCIAL LOSSES FOR THE COMPANY CAN IF THE AMOUNT IS INCORRECTLY ENTERED DURING THIS STEP.

Step 6: Within the configuration settings, everything should be defaulted to 'yes' **with the exception** of the last two (2) options: 'copy on all leads assigned?' and 'access to all customers assigned to the master agency?' Those must be manually set to 'no' within the settings.



Add Subagent

Step 2 - Set up bbarker2018's financial settings and web site settings.

financial settings

Percentage: %

Fixed Rate: %

Over-Rides: %

Input a percentage value here to pay this sub agent a percentage of the Master Agent commission. This will cause the actual commission level to vary from vendor to vendor.

Input a percentage here to pay this sub agent a fixed percentage of the total commissionable volume. Please note, this may cause little or no margins on some vendors. After entering a value here, you will have the chance on the next page to see the margins on each vendor and to make adjustments on a case by case basis if necessary.

Input a percentage here to collect a fixed percentage over-ride of the total commissionable volume. This will cause the actual commissions to the sub agent to vary from vendor to vendor.

commission split on SPIFFs %

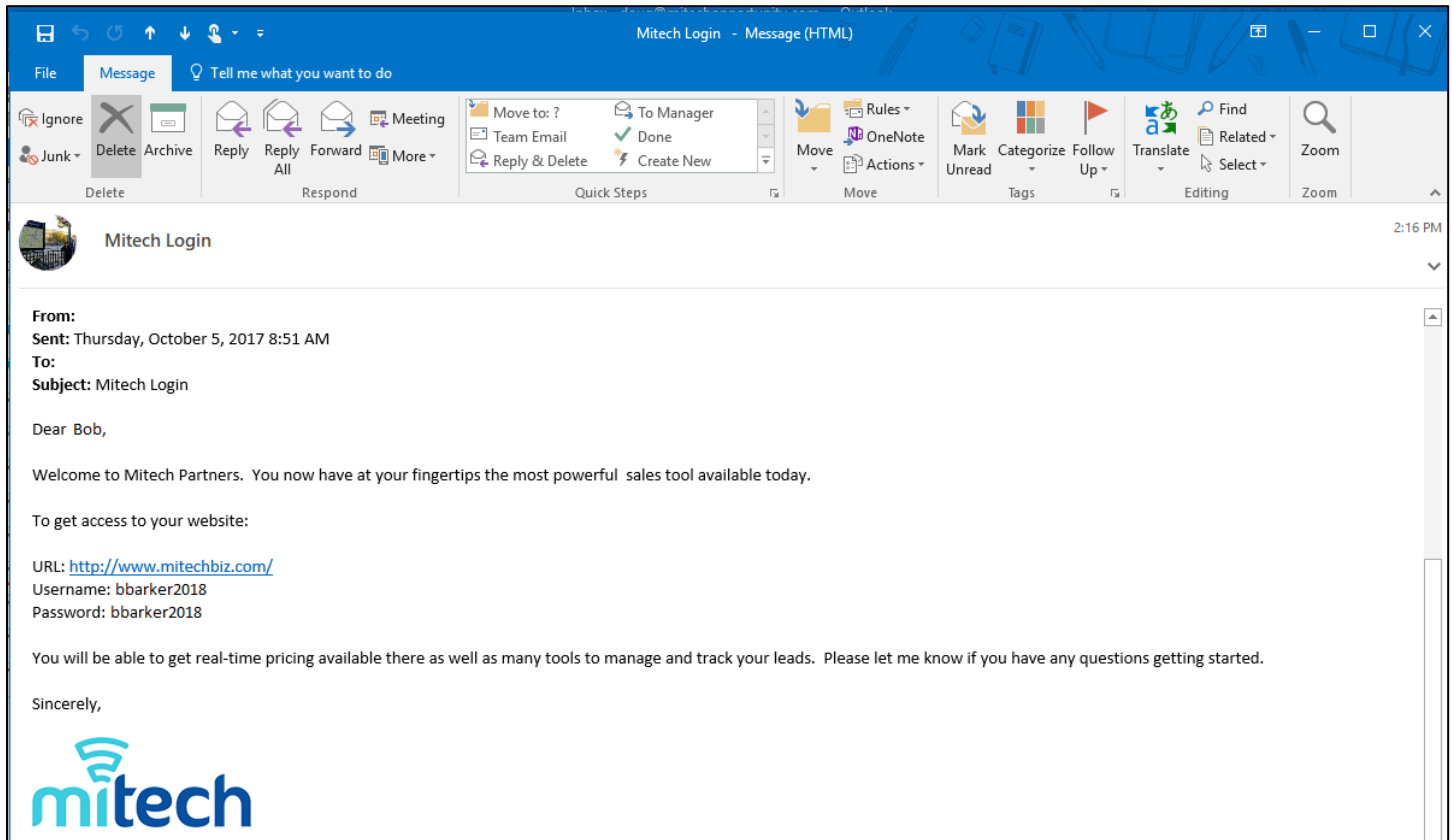
configuration settings

full access to <i>GeoQuote</i> real-time pricing?	<input checked="" type="radio"/> yes	<input type="radio"/> no
access to <i>commission reports</i> ?	<input checked="" type="radio"/> yes	<input type="radio"/> no
access to <i>var program</i> ?	<input checked="" type="radio"/> yes	<input type="radio"/> no
show <i>SPIFF</i> information?	<input checked="" type="radio"/> yes	<input type="radio"/> no
show <i>PROMO</i> information?	<input checked="" type="radio"/> yes	<input type="radio"/> no
access to <i>GeoQuote</i> news?	<input checked="" type="radio"/> yes	<input type="radio"/> no
access to <i>GeoQuote xml plugin</i> ?	<input checked="" type="radio"/> yes	<input type="radio"/> no
access to <i>GeoQuote plus</i> ?	<input checked="" type="radio"/> yes	<input type="radio"/> no
ability to upload <i>Custom Logo</i> ?	<input checked="" type="radio"/> yes	<input type="radio"/> no
access to <i>vendor contact</i> information?	<input checked="" type="radio"/> yes	<input type="radio"/> no
copy on all <i>leads</i> assigned?	<input type="radio"/> yes	<input checked="" type="radio"/> no
access to <i>all customers</i> assigned to the master agency?	<input type="radio"/> yes	<input checked="" type="radio"/> no

Part 3: Account Confirmations

The final part of the process focuses on the email sent to the new business partner once the account is created in the back office and concluding steps before partners are authorized to perform sales.

Step 7: Once the account is established, an email should be sent to the new business partner providing them with their username and password similar to what is shown below:



Step 8: After the email has been sent out, execute a courtesy welcome phone call with the new business partner **within one (1) business day** after they have been given a back-office account. In the event of no response, send a follow-up email immediately after the call. Attempt to answer any and all questions to ensure platinum-level partnership service and to ensure their success.

Questions or Further Assistance

If you have questions or need further assistance with this procedure, please reach out and contact the Doctor of Operations, Doug Trovinger, at doug@mitechopportunity.com.

