

This is a review of the client onboarding process that was completed to gain the information needed to build the Sales Playbook.

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### MPI | Overview: Goals & What to Expect

A sales playbook is a collection of strategies, processes and messaging provided to the sales team. It will provide a campaign brief with clarity about the company, sales process, and messaging for the success of the campaign.

Each week of the onboarding process, we will go through various parts of your target market and industry information, product and service offerings, client objections to help us curate messaging, develop qualified lists of contacts, and an overall campaign outreach designed to maximize and reach your sales goals. We will need your team to engage in eight, 30-minute meetings over the course of onboarding.

MPI will be responsible for majority of the work involved, but your level of involvement in this process is crucial – the more involved you are, the more success we will have together.

**1 week before Client Onboarding:**  
 MPI will submit Client Objective Questionnaire Form - About company and brand information  
 MPI will submit Onboarding flowchart and expectations  
 Include schedule of tasks, deliverables and due dates  
 Client to submit training materials (sales decks, scripts, marketing collateral, recordings, anything that they would share with a new sales team member)

**Week 1 List Development**  
 MPI will be reviewing & organizing all documentation and materials client sent over prior to Onboarding to ensure a smooth and successful onboarding process. During (Week 1), we will need two client meetings. During this week we will be reviewing clients target industry, market and prospect database.  
 • 30-minute meeting with the client to go over Client Sales Process and Demo  
 • 30-minute meeting with the client to make sure we're aligned on the prospect database & market segment  
 • MPI to submit Client Objective Questionnaire Form: Target + Industry

**Client deliverables to MPI:**  
 ✓ Client Objective Questionnaire Form: Target + Industry

**MPI deliverables to client:**  
 ✓ MPI Team and contact information

### MPI | Overview: What to Expect

**Week 2 List Analysis + Messaging & Objections**  
 MPI will be reviewing the Target & Industry information submitted from the client and build out list analysis with total number of companies and contacts available. MPI will begin to segment the list for outreach and develop a 60-day outreach plan. Additionally, MPI will collect information from the client on Messaging & Objections.  
 • No client meetings during this week

**Client deliverables to MPI:**  
 ✓ Feedback on List Segmentation and Analysis  
 ✓ Client Objective Questionnaire Form: Messaging + Objections

**MPI deliverables to client:**  
 ✓ Outline of Outreach cadence  
 ✓ List analysis and segmentation plan  
 ✓ List of current clients and prospects

**Week 3 Persona Development, Messaging + One Pager**  
 This week is dedicated to developing personas based on target market and segmentation plan, drafting scripts and 1:1 email templates. Additionally, we will outline client needs for development of a One Pager. MPI will meet with the client to review finalized list analysis + segmentation plan, common client objections and motivation to purchase. MPI will collect information from the client on messaging and objections.  
 • 30-minute meeting with the client focused on motivation to purchase and common objections

**Client deliverables to MPI:**  
 ✓ List of 3 - 5 current or previous clients  
 ✓ Client Objective Questionnaire Form: Product | Service  
 ✓ Create and submit email account connect@emailaccount.com

**MPI deliverables to client:**  
 ✓ MPI will develop personas  
 ✓ Rough draft of live script + voicemail messaging  
 ✓ Rough draft of five 1:1 email templates

### MPI | Overview: What to Expect

**Week 4 Campaign Brief, One Pager + Market Outreach**  
 MPI will be reviewing product | service offering information submitted from client and utilize to finalize One Pager. MPI will meet with the client to review messaging and gather client feedback. Feedback will be implemented to finalize messaging.  
 MPI will prep client for market research outreach initiative to previous | current clients. The goal of connecting with help us validate our list and ensure we are targeting correct contacts and reaching decision makers. MPI will provide market research email templates for  
 • 30-minute meeting with the client focused on messaging review

**Client deliverables to MPI:**  
 ✓ Feedback on initial drafts of messaging materials due prior to messaging meeting  
 ✓ Five 1:1 email templates  
 ✓ Live script and voicemail messaging  
 ✓ Appointment setting process  
 • Who are we setting appointments for?  
 • Appointment type: In person, Zoom, Teams, Call + Inks  
 • Length of meeting  
 • Calendar - availability to meet

**MPI deliverables to client:**  
 ✓ One Pager  
 ✓ Campaign Brief  
 ✓ Finalized messaging  
 • Five 1:1 email templates  
 • Live script and voicemail messaging

### MPI | Overview: What to Expect

**Week 5 Sales Playbook**  
 During this week, MPI will focus on conducting outreach to current | previous clients for market research development as well as a list of prospects with target titles we will target in the campaign. MPI's market research questions are focused on validating decision makers and influencer personas.  
 • 30-minute meeting with the client focused on motivation to purchase and common objections

**Client deliverables to MPI:**  
 ✓ Feedback on One Pager

**MPI deliverables to client:**  
 ✓ Finalized One Pager  
 ✓ Current | past client outreach  
 ✓ Quick Reference Guide  
 ✓ NPI + industry standards  
 ✓ Sales Playbook

**Week 6 Campaign Evaluation**  
 Week 6 of onboarding is reserved for campaign evaluation and reviewing go the strategy. During this time MPI and Client will evaluate whether Client will proceed with the next 2 months of contract option. MPI will continue conducting outreach with  
 • 30-minute meeting with the client focused on campaign evaluation

**Client deliverables to MPI:**  
 ✓ Decision on go forward plan

### MPI | Overview: What to Expect

**Week 7 Sales Development Rep Training**  
 Week 7 is reserved for MPI to complete any final edits for campaign kick off. This includes final tweaks to live scripts based on role playing with the SDR, to 1:1 email templates or one pager. MPI will focus on setting up HubSpot for the campaign kick off.  
 • 30-minute meeting with the client to introduce SDR, Key Account Manager and review training process

**MPI deliverables to client:**  
 ✓ Set up HubSpot for campaign outreach

**Week 8 Design, Develop, Grow!**  
 This final week of onboarding is dedicated to completing SDR training.  
 • KAM to set up weekly / recurring meetings with the client

**Congratulations on completing week 8 of onboarding!**  
 You worked hard to get here, and we are excited to work with you on the next steps... growth!



## Campaign Brief

- Client Information
- Plan Overview
- Campaign Objective
- Target Market Summary
- Product / Service Offering
- Messaging Summary
- Process for List Development & Outreach
- Opportunity Qualification Process & Criteria
- Campaign Plan: First 60 Days
- Deliverables
- Metrics and Expectations

- The Campaign Brief includes:**
- Client Overview
  - Plan Overview
  - Campaign Objective
  - Target Market Summary
  - Product/Service Offering
  - Messaging Summary
  - Process for List Development & Outreach
  - Opportunity Qualification Process & Criteria
  - Campaign Plan: First 60 Days
  - Deliverables
  - Goals & Expectations

### MPI | Campaign Brief: Client Overview

Kingsway Group is a manufacturer of products for behavioral health facilities that help increase both staff, patient safety, and help save lives. They are a leading supplier of ligature resistant products for behavioral facilities across the USA and Canada.

Kingsway Group is targeting companies in the healthcare industry, specifically inpatient behavioral health, mainly on the east coast. Although they have a higher price point than their competitors, they provide higher quality products and better solutions. They have patented, innovative products that are unlike any others in the market. They offer free of charge mockups (depending on project size). If they make a mistake, they ensure it is taken care of, no matter the cost. Their willingness to get on a phone call, video call, or even get on a plane, is unmatched. They make it easy to specify BH products, and help write the specs for their systems, which takes the complexity out of it. Ultimately, they consistently go out of their way to ensure happy customers.

Kingsway Group's mission is to push limits, challenge thinking, innovate, and do what it takes to move safety and design in Behavioral Health environments to the next level. By exploring client insights, they can leap-frog to new ways of thinking that support smarter ways of operating and deliver excellence in care.

Their goal is to grow their presence in the market and access more health systems, architects and projects.

#### Kingsway's Line of Products

- Anti-barricade door systems
- Ligature resistant door systems
- Ligature resistant vision panels
- Ligature resistant door hardware
- Ligature resistant bathroom accessories
- All products deliver a safe solution that enhances the healing environment

### MPI | Campaign Brief: Overview & Objective

#### Plan Overview

Client	Kingsway Group
Name of Campaign	Expansion into market and developing a relationship and access into more Behavioral Institutions and systems. MPI will do an outbound calling campaign, based on estimated call volume of 150 calls per week. MPI will develop prospect lists based on the target market guidance from Kingsway Group.
Client Success Manager	Evan Marsalli
Key Account Manager	Kelly Dusk
Senior Key Account Manager	Jovana Cubric
Subject Matter Expert	Aaron McCallum aaron.mccallum@kingswaygroupusa.com

#### Program Objective

- MPI will design, manage, document, and execute a scalable new business development strategy and process for Kingsway Group to sell their ligature resistant door systems and bathroom accessories and expand into new markets. Their current client portfolio is mostly new builds and remodels. They would like to grow the number Behavioral Hospitals they work with and expand their products and brand into more healthcare systems.
- Acquire new customer leads by developing a comprehensive target list of prospects. Target list will be broken down by target industry and target titles
- MPI will first focus on Behavioral Institutions as a primary target then expand into all other hospitals with Behavioral Units
- Set up qualified appointments with Kingsway's team

### MPI | Campaign Brief: Target Market

Kingsway Group facilities are built out, it required by majority of.

#### Target Contact Demographic II

#### Behavioral Patient and Capital Planning - Senior Level Management

Director of Behavioral Health

Behavioral Health Directors have the primary responsibility of developing, planning and supervising mental health services to improve quality of life for patients in need. They represent their agency by answering any questions posed by patients, families, staff, government officials, or greater public. Although they don't walk the floor with the Joint Commission, they are ultimately affected by their decision. They are the ultimate decision makers when it comes to products that are used in their facilities.

#### Buying Habits

- Motivated to keep patients safe.
- Motivated to mitigate risk.
- Looking for a product that is safe and easy to use.

### MPI | Campaign Brief: Product & Service Offering

### MPI | Campaign Brief: Messaging Summary

King'sway health facilities safety, and resistance capabilities hardware

King'sway Beyond opinion to commission

Call To Action

Desired Outcome

Path Through Offer

### MPI | Campaign Brief: Process For List Development & Outreach

MPI will utilize B2B directories to identify the appropriate and email address.

MPI is going with an email based on list

### MPI | Campaign Brief: Opportunity Qualification Process & Criteria

Qualified	Qualified companies have inpatient behavioral health units or are planning to expand or build new behavioral health units.
Not Qualified	If they have no inpatient behavioral health services, historically, outpatient and substance abuse hasn't had as much need. Not to say that isn't won't change.
Qualifying Questions	Do you have an inpatient behavioral health units are in your facility? How many beds do you have? Are you someone involved in the decision-making process for what products go into those units? How often are you reviewing your products against new solutions out there? How often do you perform audits internally?

### MPI | Campaign Brief: Campaign Plan

First 60 Days

We anticipate that it sales strategy that re in the first 60 days M have about 250 pros

Our initial 60-day

- 4 emails
- 3 calls
- 2 voicemails

Deliverable	Campaign
Internal Setup/ Campaign Creation	Weeks 1 - 4
Dedicated Call Representative	Weeks 1 - 4
Account Management Services of Program	Weeks 5-8
Outbound Activity Report	Weeks 5-8

### MPI | Campaign Brief: Deliverables

Deliverable	Campaign Execution Plan
Database/ List Assessment	2-2-6 Month Review
Marketing Services Add-On \$2500 per month	

### MPI | Campaign Brief: Goals & Expectations

Kingsway Group is looking to expand their brand awareness and form introductory calls with the goal of getting more projects through health systems. MPI wants to set appropriate expectations for program ramp up and results from our outreach efforts. We anticipate that it will take up to 16 weeks to test and validate the cold outreach and messaging strategy.

Our goal is to get 1 appointment a week on average with a qualified prospect for an introductory call. The obvious win is to generate more business for Kingsway Group.

During the first 8 weeks of onboarding MPI will develop lists of prospects to target, develop messaging and a campaign for go to market. MPI will also validate prospect list for Kingsway Group through market research calls.

MPI expects the first 60 days to be focused on building out the list, building out a message that resonates with our market and to begin building on brand awareness. After the first 60 days we would expect to have enough data to form a strategy for qualified list generation, messaging that resonates with our prospects, and establish KPI's that will allow us to measure the effectiveness of the campaign.

Kingsway Group's goal is to gain more health system leads, as these leads tend to lead to larger projects and revenue, rather than getting involved with these projects through architects and distributors.



The List Development includes:  
List Analysis of Targeted Groups  
List Validation

**MPI | List Development: Targeting Plan**

- Market Segmentation:**
  - Develop and identify basis for segmentation
  - Determine important characteristics of each market segment
  - Persona development
- Select Target Market:**
  - Evaluate potential and commercial attractiveness of each segments
  - Select one or more segments
  - Customer lifecycle targeting
- Product Positioning:**
  - Develop detailed product positioning for selected segments
  - Develop a marketing mix for each selected segment
  - Proposition messaging
  - Value proposition
- Optimal Marketing Mix:**
  - Automated customer contact strategy
  - Cadence development
  - Deploy resources to achieve plan

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**MPI | List Development: Analysis Target Group 2**

**Target Industry:**  
All Hospitals With Behavioral Health

**Geographical Focus:**  
GA, IA, KS, MT, NJ, ND, NC, PA, SD, VA

**Size of Organization:**  
Any

**Target Titles:**

- Director of Capital Planning
- Director of Facilities
- Director of Behavioral Health
- Director of Health & Safety
- Capital Projects Manager
- Plant Operations Manager
- Department Nurse Manager
- Patient Safety | Risk Manager

**Persona Development**

**Decision Makers:**  
Director of Capital Planning, Capital Projects Manager, Director of Behavioral Health

**Influencers:**  
Director of Facilities, Plant Operations Manager, Patient Safety | Risk Manager, Director of Health & Safety

**Users:**  
Department Nurse Manager, Behavioral Health Clinical Teams

**List Segmentation:**

**Target #1 Influencers:**  
Influencers are involved in day-to-day operations of the behavioral health facility and are directly involved in retrofitting projects and renovations. We believe there is a higher likelihood of retrofit and reno projects than new builds.

**Target #2 Decision Makers:**  
This group is involved in the planning stages of renovation projects and new builds. New builds is a smaller percentage of prospects than retrofits and renos, which is why we recommend targeting this group in second stage of the campaign outreach.

**Number of Organizations | 1,780**

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**MPI | List Development: Analysis Target Group 1**

**Target Industry:**  
Behavioral Health Facilities  
24-hour hospital inpatient

**Geographical Focus:**  
GA, IA, KS, MT, NJ, ND, NC, PA, SD, VA

**Size of Organization:**  
Any

**Target Titles:**

- Director of Capital Planning
- Director of Facilities
- Director of Behavioral Health
- Director of Health & Safety
- Capital Projects Manager
- Plant Operations Manager
- Department Nurse Manager
- Patient Safety | Risk Manager

**Persona Development**

**Decision Makers:**  
Director of Capital Planning, Capital Projects Manager, Director of Behavioral Health

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**Target #2 Decision Makers:**  
This group is involved in the planning stages of renovation projects and new builds. New builds is a smaller percentage of prospects than retrofits and renos, which is why we recommend targeting this group in second stage of the campaign outreach.

**Number of Organizations | 897**

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### Current & Past Client Outreach

### Current & Past Client Outreach includes:

- Process used to reach out to current and past clients
- Email that can be sent to those clients
- Results from five clients on 10 key questions

**MPI | Current & Past Client Outreach**

**Purpose of Client Outreach**

As part of target market analysis and market research, MPI conducts an outreach to your current and/or past clients. The goal is to help us to validate our list to ensure we're targeting the correct contacts and reaching the decision maker. As a part of this, we would like to reach out to five of your current clients with a brief survey to gather feedback about their relationship with you. We would ask them questions about:

- The type of problems and pain points they were experiencing before they started working with you
- What was their decision-making process when it comes to selecting a vendor
- Value you bring to the client.

MPI will provide an email template to send to your clients requesting a reference, introducing MPI and outlining general purpose of our outreach.

**MPI will use a 4-step cadence in client outreach:**

**Step 1: Call with Voicemail**  
**Step 2: Email**  
**Step 3: Call with Voicemail**  
**Step 4: Email - threaded reply to Email #1**

**MPI | Current & Past Client Outreach: Memo to Your Clients**

**Introduction Template – MPI Intro**

**Subject: Reference Request**

Hi (client first name),

Hope you're doing well! I'm reaching out to introduce (CLIENT NAME) and MPI. (Contact's First Name), we're starting a new lead generation program with MPI and they're looking to speak with our current clients for market research. Given our history, I thought your feedback would be extremely valuable.

With your permission, I would like to connect them with you. Is it ok with you for me to share your contact information?

If so, MPI would reach out over the course of next week with a few questions to gather feedback on the following:

- The type of problems and pain points you were experiencing before you started working with us
- What was your decision-making process when it comes to selecting a vendor
- What you value the most about our products and services

It shouldn't take more than 5 minutes of your time. I've included a one-pager that includes a list of questions they would ask.

(Contact's First Name), is it ok for me to have them reach out? We would really appreciate your feedback and help with this!

Thanks,  
(Name)

**MPI | Current & Past Client Outreach: Client Analysis**

How is your company using the vendor's products or services?

Client 1:  
Client 2:  
Client 3:  
Client 4:  
Client 5:

Who are the end users? What are their titles?

Client 1:  
Client 2:  
Client 3:  
Client 4:  
Client 5:

What do you value most about your current vendor and what they do for you?

Client 1:  
Client 2:  
Client 3:  
Client 4:  
Client 5:

**MPI | Current & Past Client Outreach: Client Analysis**

Before you began working with this vendor, what pain points or problems were you experiencing that led you to work with them?

Client 1:  
Client 2:  
Client 3:  
Client 4:  
Client 5:

What other options did you explore?

Client 1:  
Client 2:  
Client 3:  
Client 4:  
Client 5:

Why did you decide to work with this vendor over the other options?

Client 1:  
Client 2:  
Client 3:  
Client 4:  
Client 5:

**MPI | Current & Past Client Outreach: Client Analysis**

What did the decision-making process look like? Who influenced the decision, and what were their job titles?

Client 1:  
Client 2:  
Client 3:  
Client 4:  
Client 5:

If you were to redo the process today, is there anything you would have done differently, or anyone else you would have involved? Why?

Client 1:  
Client 2:  
Client 3:  
Client 4:  
Client 5:

**MPI | Current & Past Client Outreach: Client Analysis**

How frequently would you review alternative options?

Client 1:  
Client 2:  
Client 3:  
Client 4:  
Client 5:

How would you suggest a vendor start a conversation to potentially do business with you?

Client 1:  
Client 2:  
Client 3:  
Client 4:  
Client 5:



Persona Development includes: Analysis of the Decision Maker, Influencer, and User for the target market.

**Persona Development: Decision Maker**

**Target Titles:**

- Director of Behavioral Health
- Director of Capital Planning
- Director of Health & Safety

**Department or Functional Area:**

- Operations

**Pain Points**

Multiple projects and plans  
The need for behavioral health is greater than resources available  
Major organizational changes needed to support the needs  
Increasing patient & staff safety, and providing products that are simple & easy to operate

**Responsibilities**

Develop and direct behavioral health services to improve quality of life for patients

- Evaluate and implement new projects

**Objections**

Operating issues  
When retrofits and updates are happening, units need to be shut down causing backlog in patients, potential shortages of room and operational constraints.

**Improvements**

Reduction in Risk Associated with BMH patients and increase in staff safety

- Improved monitoring
- Increased safety of staff members and patients
- Emergency management
- Safe and easy to use products
- Mock-ups & actual products they can test, try & feel

**Purchasing Power**

Have full autonomy in decision making  
They oversee budgets, projects and plan and execute new initiatives. They are directly responsible for approved vendors and products/services used.  
Ensure the product is going to last, is not too expensive, and they will be supported if issues occur

**Preferred Channels**

Mobile
 Direct
 Email

**Persona Development: Influencer**

**Target Titles:**

- Director of Facilities
- Plant Operations Manager
- Patient Safety | Risk Manager
- Director of Health & Safety
- Capital Projects Manager

**Department or Functional Area:**

- Operations

**Pain Points**

Products in behavioral health facilities take a tremendous amount of abuse  
Budget may be an issue  
Shutting down units for upgrades  
Time it takes to approve changes and budget  
Audits

**Responsibilities**

Evaluate and Implement Risk Management Protocols and Processes  
Responsible for day-to-day operations and safety of staff and patients.

**Objections**

Operating issues  
When retrofits and updates are happening, units need to be shut down causing backlog in patients, potential shortages of room and operational constraints.

**Improvements**

Reduction in Risk Associated with BMH patients and increase in staff safety

- Increased safety of staff members and patients
- Long lasting products that are safe and easy to use
- Reduced install times with pre-installed hardware

**Purchasing Power**

Need budget approved to get buy in  
They do not have full decision-making power on which vendors to utilize. Depending on the scope and size of the projects, they often need to involve Capital Planning and Behavioral Health Directors.

**Preferred Channels**

Mobile
 Direct
 Email
 Text

**Persona Development: User**

**Target Titles:**

- Behavioral Health teams
- Clinical teams
- Department Nurse Manager

**Department or Functional Area:**

- Behavioral Health Teams

**Pain Points**

Exposure to high-risk patients  
Experiencing physical and verbal abuse  
Do not have control over the decision making  
Are not involved in the review of products available on the market that would improve their work environment

**Responsibilities**

Provides Nursing Care for Patients  
Consults with psychiatrists and other behavioral health staff in designing appropriate treatment plans for patients.  
Administer care to patients

**Objections**

Do not have decision making power  
While highly affected by the hospital equipment and set up, they do not have decision making power over what type of systems hospital uses and installs.

**Improvements**

Reduction in Risk Associated with BMH patients

- Reduction of elopement
- Improved accessibility to patient – occupied areas
- Reduction of injuries while mitigating patients' sudden changes of behavior.
- Reduced time to respond to patients

**Purchasing Power**

Do not have purchasing power  
Clinical and behavioral teams are involved during training process. They are shown how the systems work once the decision has been made for new systems to be implemented and are already purchased.

**Preferred Channels**

Direct
 Email



**Messaging**

- Voice Messaging
- 1:1 Email Messaging
- One Page Sell Sheet

Messaging includes:  
Voice Messaging  
1:1 Email Messaging  
One Page Sell Sheet

### MPI | Messaging: Outbound Call Scripting

#### Voicecall

Hi (prospect) this is (MPI Rep) with Kingsway Group. I'm reaching out to introduce you to Kingsway Group. We make products for behavioral health facilities that help increase staff and patient safety, products such as ligature resistant and anti-barricade door systems with monitoring capabilities, and ligature resistant vision panels, door hardware and bathroom accessories.

If you'd like to learn more, feel free to call me at (xxx) xxx-xxxx or reply to the email I sent to you.

Looking forward to hearing back!

#### Script

Hi (prospect), this is (MPI rep) with Kingsway Group. How are you today?

Great, I'm reaching out because I wanted to introduce you to our company. We make products for behavioral health facilities that help increase staff and patient safety.

Do you have an inpatient behavioral health unit at your facility?

How many beds do you have?

Are you someone who is involved in the decision-making process for what products go into those units? (If they do have these units, skip the next question, if they don't, proceed to the next question.)

Are you familiar with Kingsway? We are a resource to create an overall safer environment and de-risk. Beyond our door and bath products, we can also offer a second opinion to provide advice on ways to improve ahead of your next joint commission survey.

How often are you reviewing your products against new solutions out there? - we have new solutions that we are always innovating on. One of our new products is our door top monitoring system that detects weight on a door, and sends a notification to your staff.

How often do you perform audits internally and evaluate opportunities?

**CLOSE:** I'll schedule some time between you and my colleague, Aaron. Do you have time next week on (DAY) or (DAY) ?

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### MPI | Messaging: Outbound Call Scripting

#### Kingsway Offers

- Anti-barricade door systems
- Ligature resistant door systems
- Ligature resistant vision panels
- Ligature resistant door hardware
- Ligature resistant bathroom accessories

#### Talking Points

- We understand the market as this is the only market that we provide solutions for.
- Having happy customers is our main global objective - we won't stop until they are happy with the solution we have provided. (If something goes wrong, we're onsite taking care of it.)
- Working with health systems to create a solution specific to their needs.
- Innovation - we are constantly innovating, which shows in the solutions we offer.
- With over 2500 projects completed globally, we have earned the trust of numerous health systems, resulting in repeat business.

#### Objections Talk Tracks

##### We don't have a need right now.

**Responses:**  
No problem, could I send you my info for when a need does come up?  
Do they foresee any changes/expansions coming?  
When was their last Joint Commission survey?

##### We don't have the budget for improvements.

**Responses:**  
Understood, and is this something you see changing in the future?  
When do new funds get allocated & how?  
If an incident were to happen, how would that change funding?

##### You have to be in our corporate spec to be used.

**Response:**  
No problem, who would you suggest we speak with to start that process?

##### Your price is too high.

**Response:**  
Understood, but we are not the cheapest, but we do believe that we have higher quality, and as a result, safer products. Would you mind sharing with me which other company's prices you're comparing ours to?

### MPI | Messaging: 1:1 Email



#### Email 1

**Subject: Increasing staff and patient safety is easy with Kingsway Group**

Hi (First Name),

I'm reaching out to introduce our company, Kingsway Group. We are a manufacturer of products for behavioral health facilities that help increase both staff and patient safety. We are a leading supplier of ligature resistant products for behavioral facilities across the USA and Canada.

I've attached a brochure that goes into more detail about our company.

[Desk brochure US 2022 \(2/24/21\).pdf](#)



If you want to hear more, feel free to call me at the number below, reply to this email, or book some time on [Aaron's calendar](#).

Thanks,

MPI Rep Signature

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### MPI | Messaging: 1:1 Email



#### Email 2

**Subject: 70% of inpatient suicide attempts involve a ligature or strangulation point**

Hi (First Name),

I'm reaching out with Kingsway Group and I wanted to share some statistics with you.

1. Suicide continues to be an on-going challenge in US society with 1 death occurring every 11 minutes in 2020.

2. 70% of inpatient suicide attempts involved a ligature or strangulation point.

3. 54% of those attempts used either the Door or Door Hardware.

4. 50% of suicides happen in the bathroom, and 33% in the bedroom - ([Peer journal commission US 2020](#))

Kingsway Group is a manufacturer of products for behavioral health facilities that help increase both staff and patient safety. Using our products help you mitigate risk, with a solution tailored to your specific need.

Click [here](#) to check out how we helped the folks over at The University of Maryland Medical Centre. Additionally, check out our switch anti-barricade door system and vision panels used on this project.

[The University of Maryland Medical Centre.pdf](#)



If you want to hear more, feel free to call me at the number below, reply to this email, or book some time on [Aaron's calendar](#).

Thanks,

MPI Rep Signature

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### MPI | Messaging: 1:1 Email



#### Email 3

**Subject: Are you prepared for your next Joint Commission survey?**

Hi (First Name),

I'm contacting you from Kingsway Group. We are a manufacturer of products for behavioral health facilities that help increase both staff and patient safety. Our mission is to help save lives.

I just wanted to reach out to make sure you're ready for your next Joint Commission survey. When partnering with Kingsway, we work together to help you stay compliant to existing and updated standards set by agencies like CMS and the Joint Commission. Our products are designed to help mitigate risk - this includes patients performing self-harm, as well as protecting staff from being harmed.

Our products are designed to be ligature resistant and extremely robust to help reduce:

- Patient self-harm.
- Products being compromised and used as a weapon.

Additionally,

- Top door alarm alerts staff if something is causing weight on the top of the door (one of the most common points of ligature attachment).
- Many of our products are approved in the NYS Guide or the Behavioral Health Facility guide, so facilities can have confidence that Kingsway products are up-to-date.

Click [here](#) to read more about our de-risking process.

If you want to hear more, feel free to call me at the number below, reply to this email, or book some time on [Aaron's calendar](#).

Thanks,

MPI Rep Signature

© MPI

### MPI | Messaging: 1:1 Email



#### Email 4 - Voicemail followup

**Subject: Did you get my voicemail?**

Hello (First Name),

I left you a voicemail, but thought email might be a better way to connect. I'm reaching out to introduce you to Kingsway Group. We are a manufacturer of products for behavioral health facilities that help increase both staff and patient safety. We are a leading supplier of ligature resistant products for behavioral facilities across the USA and Canada.

We offer:

- Anti-barricade door systems
- Ligature resistant door systems
- Ligature resistant vision panels
- Ligature resistant door hardware
- Ligature resistant bathroom accessories

All products deliver a safe solution that enhances the healing environment.

I've attached a case study that goes into more detail about our successes in the behavioral healthcare industry. I'm ultimately looking to schedule some time between yourself and our project consultant, Aaron McCallum. He can go into more detail about this and answer any questions you may have.

Check out [how Pontiac General Hospital in Michigan incorporated some of our ligature resistor products](#).

If you'd like to learn more, feel free to call me at the number below, reply to this email, or book some time on [Aaron's calendar](#).

Looking forward to hearing back!

MPI Rep Signature

© MPI

### MPI | Messaging: 1:1 Email



#### Email - Information Request

**Subject: Just spoke to you - Kingsway**

Hi (First Name),

Thanks for taking time out of your day to that with me. As we discussed, Kingsway is a leading supplier of ligature resistant products for behavioral facilities across the USA and Canada.

We offer:

- Anti-barricade door systems
- Ligature resistant door systems
- Ligature resistant vision panels
- Ligature resistant door hardware
- Ligature resistant bathroom accessories

I've attached a brochure that goes into more detail about our company.

[Desk brochure US 2022 \(2/24/21\).pdf](#)



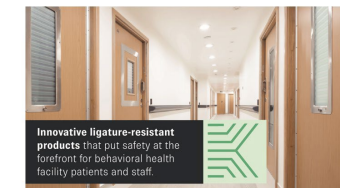
If I'll be following up next week to see if you have any additional questions or if you want to hear more about us, if you'd like to set up an initial call, feel free to call me at the number below, reply to this email, or book some time on [Aaron's calendar](#).

Hope to hear from you soon!

MPI Rep Signature

© MPI

### MPI | Messaging: One Page Sell Sheet



**Innovative ligature-resistant products that put safety at the forefront for behavioral health facility patients and staff.**

**About Us**  
We specialize in the design, manufacture, and supply of high quality ligature-resistant products that improve patient and staff safety, while maintaining federal compliance regulations for behavioral health facilities. We pride ourselves in providing innovative designs that support smarter ways to deliver exceptional care in the most demanding environments.

**Key Benefits of Partnering with Kingsway Group**

- Fixed hinge doors improves safety, while reducing injury and infection risk.
- Joint Commission PGI compliant
- Products can be installed in new door frame or retro-fit to existing frames.
- We collaborate with you on a de-risk evaluation and facility review

**Products**

- Door Systems
- Anti-Barricade Hardware
- Handles and Hinges
- Cast Holes and Door Stops
- Ancillary Items
- Vision Panels
- Dispensers and Grab Bars

**Contact Us To Learn More**  
164 Indiana Court, Troy, MI 48063 | 248-629-9520  
kingswaygroup.com | info@kingswaygroup.com

**Kingsway Group**

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**Messaging**

- Voice Messaging
- 1:1 Email Messaging
- One Page Sell Sheet

© MPI

Messaging includes:  
Voice Messaging  
1:1 Email Messaging  
One Page Sell Sheet

### MPI | Messaging: Outbound Call Scripting

#### Voicecall

Hi (prospect) this is (MPI Rep) with Kingsway Group. I'm reaching out to introduce you to Kingsway Group. We make products for behavioral health facilities that help increase staff and patient safety, products such as ligature resistant and anti-barricade door systems with monitoring capabilities, and ligature resistant vision panels, door hardware and bathroom accessories.

If you'd like to learn more, feel free to call me at (xxx) xxx-xxxx or reply to the email I sent to you.

Looking forward to hearing back!

#### Script

Hi (prospect), this is (MPI rep) with Kingsway Group. How are you today?

Great, I'm reaching out because I wanted to introduce you to our company. We make products for behavioral health facilities that help increase staff and patient safety.

Do you have an inpatient behavioral health unit at your facility?

How many beds do you have?

Are you someone who is involved in the decision-making process for what products go into those units? (If they do have these units, skip the next question, if they don't, proceed to the next question.)

Are you familiar with Kingsway? We are a resource to create an overall safer environment and de-risk. Beyond our door and bath products, we can also offer a second opinion to provide advice on ways to improve ahead of your next joint commission survey.

How often are you reviewing your products against new solutions out there? - we have new solutions that we are always innovating on. One of our new products is our door top monitoring system that detects weight on a door, and sends a notification to your staff.

How often do you perform audits internally and evaluate opportunities?

**CLOSE:** I'll schedule some time between you and myself and my colleague, Aaron. Do you have time next week on (DAY) or (DAY) ?

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### MPI | Messaging: Outbound Call Scripting

#### Kingsway Offers

- Anti-barricade door systems
- Ligature resistant door systems
- Ligature resistant vision panels
- Ligature resistant door hardware
- Ligature resistant bathroom accessories

#### Talking Points

- We understand the market as this is the only market that we provide solutions for.
- Having happy customers is our main global objective - we won't stop until they are happy with the solution we have provided. (If something goes wrong, we're onsite taking care of it.)
- Working with health systems to create a solution specific to their needs.
- Innovation - we are constantly innovating, which shows in the solutions we offer.
- With over 2500 projects completed globally, we have earned the trust of numerous health systems, resulting in repeat business.

#### Objections Talk Tracks

##### We don't have a need right now.

**Responses:**  
No problem, could I send you my info for when a need does come up?  
Do they foresee any changes/expansions coming?  
When was their last Joint Commission survey?

##### We don't have the budget for improvements.

**Responses:**  
Understood, and is this something you see changing in the future?  
When do new funds get allocated & how?  
If an incident were to happen, how would that change funding?

##### You have to be in our corporate spec to be used.

**Response:**  
No problem, who would you suggest we speak with to start that process?  
Thanks.

##### Your price is too high.

**Response:**  
Understood, but we are not the cheapest, but we do believe that we have higher quality, and as a result, safer products. Would you mind sharing with me which other company's prices you're comparing ours to?

### MPI | Messaging: 1:1 Email



#### Email 1

**Subject: Increasing staff and patient safety is easy with Kingsway Group**

Hi (First Name),

I'm reaching out to introduce our company, Kingsway Group. We are a manufacturer of products for behavioral health facilities that help increase both staff and patient safety. We are a leading supplier of ligature resistant products for behavioral facilities across the USA and Canada.

I've attached a brochure that goes into more detail about our company.

[Desk brochure US 2022 \(2/24/21\).pdf](#)



If you want to hear more, feel free to call me at the number below, reply to this email, or book some time on [Aaron's calendar](#).

MPI Rep Signature

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### MPI | Messaging: 1:1 Email



#### Email 2

**Subject: 70% of inpatient suicide attempts involve a ligature or strangulation point**

Hi (First Name),

I'm reaching out with Kingsway Group and I wanted to share some statistics with you.

1. Suicide continues to be an on-going challenge in US society with 1 death occurring every 11 minutes in 2020.

2. 70% of inpatient suicide attempts involved a ligature or strangulation point.

3. 54% of those attempts used either the Door or Door Hardware.

4. 50% of suicides happen in the bathroom, and 33% in the bedroom - ([Peer journal commission US 2020](#))

Kingsway Group is a manufacturer of products for behavioral health facilities that help increase both staff and patient safety. Using our products help you mitigate risk, with a solution tailored to your specific need.

Click [here](#) to check out how we helped the folks over at The University of Maryland Medical Centre. Additionally, check out our switch anti-barricade door system and vision panels used on this project.

[The University of Maryland Medical Centre.pdf](#)



If you want to hear more, feel free to call me at the number below, reply to this email, or book some time on [Aaron's calendar](#).

MPI Rep Signature

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### MPI | Messaging: 1:1 Email



#### Email 3

**Subject: Are you prepared for your next Joint Commission survey?**

Hi (First Name),

I'm contacting you from Kingsway Group. We are a manufacturer of products for behavioral health facilities that help increase both staff and patient safety. Our mission is to help save lives.

I just wanted to reach out to make sure you're ready for your next Joint Commission survey. When partnering with Kingsway, we work together to help you stay compliant to existing and updated standards set by agencies like CMS and the Joint Commission. Our products are designed to help mitigate risk - this includes patients performing self-harm, as well as protecting staff from being harmed.

Our products are designed to be ligature resistant and extremely robust to help reduce:

- Patient self-harm.
- Products being compromised and used as a weapon.

Additionally,

- Top door alarm alerts staff if something is causing weight on the top of the door (one of the most common points of ligature attachment).
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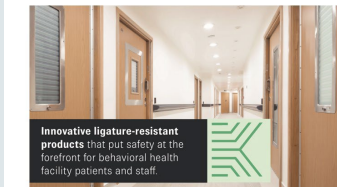
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### MPI | Messaging: One Page Sell Sheet



**Innovative ligature-resistant products that put safety at the forefront for behavioral health facility patients and staff.**

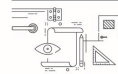
#### About Us

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Contact Us To Learn More  
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[kingswayusa.com](mailto:kingswayusa.com) | [info@kingswayusa.com](mailto:info@kingswayusa.com)



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### Outreach Cadence

**Outreach Cadence includes:**  
 Summary of MPI's outreach sequence  
 Flow chart illustrating the sequence

**MPI Outreach Cadence**

MPI uses a combination of calls and emails as a form outreach to prospects. Our main objection is to connect with prospects via phone and introduce your company, products and services. MPI's objective is to sell the appointment with your team based on carefully crafted messaging, designed to your campaign and strategy.

We use 1:1 email messaging to warm up the list, by reviewing email engagements we conduct call outreach to those prospects first. We also utilize 1:1 email templates to engage prospects whose primary form of communication is email; or prefer it over telephone.

**7 Step Sequence**

We developed a 7 - step sequence in combination of email and telephone outreach conducted over a 4 - week span. Each week, a prospect will experience one to two different touch points with your company. This includes call, voicemail, and email.

Upon cadence completion, prospects with whom MPI was not able to engage will get put into a separate list. MPI will enhance the lists a later time during the campaign and use for future outreach.

Separately, MPI highly recommends conducting ongoing marketing campaigns (monthly or quarterly) with newsletters, product knowledge information, industry education, etc.

**MPI Call Campaign: Outreach Cadence**

```

    graph TD
      A[Pre - Campaign Outreach] --> B[One to One Email Template #1]
      B --> C[Campaign Outreach]
      C --> D[Opens - Prioritize]
      D --> E[Call with Voicemail]
      E --> F[Call Mobile, then Direct #]
      F --> G[One to one Email Template #2]
      G --> H[Call - No Voicemail]
      H --> I[Call Mobile (direct if no cell)]
      I --> J[One to One Email Template #3]
      J --> K[Call with Voicemail]
      K --> L[Call Mobile, then Direct #]
      L --> M[One to One Email - Voicemail Follow up]
      M --> N[Post Campaign Outreach]
      N --> O[MPI will store contacts for future campaign outreach]
      N --> P[MPI recommends putting these contacts in monthly & quarterly email campaigns]
    
```





### KPI Summary

**KPI Summary includes:**  
Summary of what MPI will be measuring during a call campaign  
Results from Marketing Research List Validation calls

### MPI | KPI Summary: Call Analytics

Each week MPI tracks the number of total calls and connections made with prospects from the list an SDR is calling on. Connections are broken down based on the outcome of the conversation. Your KAM will review the breakdown of KPIs each week on a weekly/ bi-weekly call and send weekly results via email. Discoveries made from the call analysis help improve list builds and narrowing target market.

	<b>Total Dials</b> 150	Each week an SDR will make an average of 150 dials per week. This may include slightly more or less per week based on SDR scheduling, holidays, etc. High connection rates and conversation times may impact the number of dials as well.
	<b>Number of Appointments</b>	The goal is to set as many appointments as possible for the team. MPI will report on a total number of appointments set each week and send lead pass with each appointment as it is scheduled.
	<b>Number of Connections</b>	MPI will track number of connections each week and report on. The higher the engagement, the higher likelihood of appointments and follow ups. Certain roles are less likely to connect over the phone than others.
	<b>Not Interested</b>	Contacts we connected with who are not interested in product/service or do not wish to talk about new product offerings.
	<b>Information Request</b>	Any time we connect with a prospect who is interested in learning more information, but is not interested in meeting yet, we send out additional information. SDR does follow up calls to try and convert to an appointment in the future.
	<b>Follow ups</b>	Any time we connect with a prospect who requests to be followed up with at a different time or to be called up at the time of the call, an SDR schedules a follow up call task.
	<b>Contacts Not Qualified</b>	Contact would be deemed not qualified if the person we called on and connected with is not a decision maker or an influencer.
	<b>Company Not Qualified</b>	Company would be deemed not qualified if they don't have any inpatient behavioral health units.

### MPI | KPI Summary: Email Analytics

Each week MPI tracks one to one email engagement made with prospects from the list an SDR is calling on. Email analytics are broken down based on email opens and clicks. Your KAM will include screen shots of email results within weekly result review, along with any email engagement worth noting.

	<b>Sent to 250 contacts At a time</b>	<b>E-Mail Name</b> A/B Test <b>Sent Date</b> Email #1 - 01/23/2022
	<b>Open Rate Goal 20%</b>	<b>Lists</b> Kingway Group Target 1 list - 250 contacts Weeks 1 - 4 Kingway Group Target 2 list - 250 contacts Weeks 5 - 8
	<b>Click Through Rate Goal 2%</b>	<b>Email Learnings &amp; Recommendations</b> Industry average <b>Open Rate for health professionals is 16-23%</b> , <b>Click Thru Rate is 1-3%</b>
	<b>Bounce Rate Goal Below 5%</b>	Email templates to balance the "features" and selling with engaging prospects to click on the pdf sell sheets and case studies included into the emails. MPI will focus call outreach on email opens and clicks first, as these prospects are considered warmer prospects based on their engagement with one-to-one emails.
	<b>Unsubscribes Goal Below 1%</b>	A win would be for a prospect to engage and respond to an email requesting more information or to talk to a representative. MPI will make future recommendations and updates to email templates based on engagement and overall messaging strategy.

### MPI | KPI Summary: Market Research List Validation Calls

MPI conducted research by calling a list of 88 contacts built according to decided upon criteria. 150 calls were made, resulting in 24 connections, 7 of which were deemed to be unqualified. Results include:

	<b>Total Dials</b> 150	Each week an SDR will make an average of 150 dials per week. This may include slightly more or less per week based on SDR scheduling, holidays, etc. High connection rates and conversation times may impact the number of dials as well.
	<b>Number of Appointments</b> 9	The goal is to set as many appointments as possible for the team. MPI will report on a total number of appointments set each week and send lead pass with each appointment as it is scheduled.
	<b>Number of Connections</b> 25	MPI will track number of connections each week and report on. The higher the engagement, the higher likelihood of appointments and follow ups. Certain roles are less likely to connect over the phone than others.
	<b>Not interested</b> 6	Contacts we connected with who did not want to participate in answering any questions.
	<b>Follow ups</b> 3	Contacts who deferred a survey. Requested follow up.
	<b>Contacts Not Qualified</b> 3	Contact who deemed they are not qualified to answer any survey questions.
	<b>Company Not Qualified</b> 4	Company would be deemed not qualified if they don't have any inpatient behavioral health units.

### MPI | KPI Summary: Market Research List Validation Calls

**At the beginning of each connection, prospects were briefed on the purpose of the research--"to learn how different healthcare facilities make decisions about changes to improve safety in their behavioral health units."**

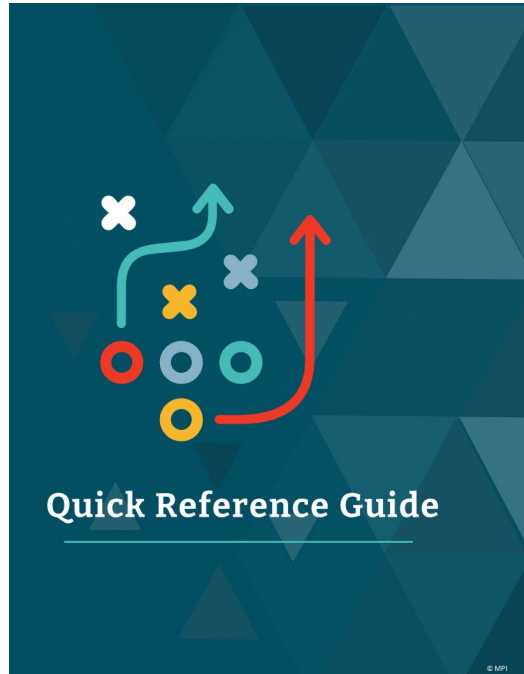
The questions asked, and a summary of the answers received are as follows:

- Do you have a behavioral health unit?
  - Companies with out were ruled as unqualified
- How many Beds do you have?
  - Answers ranged from 16-300 beds.
- What do you do within those rooms to make them ligature resistant, barricade resistant, and overall de-risk them?
  - Prospects went into length on their internal doings here. Answers were consistent, aligning with the joint commission guidelines standard practices.
  - Some organizations had other standards they followed in addition to the joint commission. Examples include requirements passed from their parent or corporate location, PDH Guidelines, and local State Guidelines required for certification.
- What's your involvement when it comes to making decisions about replacing doors and accessories in those rooms?
  - Who are the influencers in that process?
    - Answers included: Director of Plant Operations, Director of Operations, Director of Plant operations, Safety officer, individual safety or facilities committee members
  - Who is/are the decision makers in that process?
    - VP of Facilities, Director of Facilities/Operations, Facilities department, Safety committee (joint decision)
- What does the decision-making process look like for that in your facility?

### MPI | KPI Summary: Market Research List Validation Calls

It is common for decisions to be made on a committee basis. Organizations have a safety committee that audits the safety of their facilities quarterly, with the more active boards meeting as often as monthly. Buying motivation occurs in instances of remodels/updates, repairs, or once a threat/safety incident has been identified. Employee processes for pointing out defects and making recommendations seems most common across connections, although there was one instance of a company only replacing things when they break. Budget decisions are made annually.

As far as buying process is concerned, one smaller firm with 32 beds mentioned working directly with an architecture firm that specializes in JCO compliance. One larger company with 146 beds in their facility mentioned sending out a request for 3 bids when a need arises. Larger companies with several facilities may or may not operate independently. In one call with such a company, budget approvals were made at a corporate/central location.



**Quick Reference Guide includes:**  
A look at the guide MPI's SDRs use during the call campaign that includes messaging, company contacts, and more.

### MPI Client Quick Reference Guide

**Client Information**

- Client Name:** Kingway Group - <http://www.kingwaygroupusa.com/>
- Time Zone:** Eastern Standard Time - Troy, MI
- Contract:** MPI - Kingway Group contact
- Start Date:** 11/29/2022 **Early Term Date:** 1/28/2023 **End Date:** 2/23/2023
- Contacts:**
  - Name: Aaron McCallum (Project Coordinator) | Email: [aaron.mccallum@kingwaygroupusa.com](mailto:aaron.mccallum@kingwaygroupusa.com) | Phone: 248-818-2423
  - Name: Ashley Richard (Project Coordinator) | Email: [ashley.richard@kingwaygroupusa.com](mailto:ashley.richard@kingwaygroupusa.com) | Phone: 248-840-8810 x 3121
- Database/CRM:** CRM: HubSpot | Username: connect@kingwaygroupusa.com | Password: [REDACTED]
- Email:** Platform: Outlook | Username: connect@kingwaygroupusa.com | Password: [REDACTED]
- Products:** Anti-barricade door systems, Ligature resistant door systems, Ligature resistant vision panels, Ligature resistant door hardware, Ligature resistant bathroom accessories
- Benefit Statement:** Kingway is a manufacturer of products for behavioral health facilities that help increase both staff & patient safety.
- Marketing Information:**
  - Email Templates:** [Click here for email templates.](#)
  - Marketing Campaign:** [Click to enter text](#)

### MPI Quick Reference Guide

**Program Information**

- Campaign Focus:** Campaign Strategy & Results - MPI will design, manage, document, and execute a scalable new business development strategy and process for Kingway Group to sell their ligature resistant door systems and bathroom accessories and expand into new markets. Their current client portfolio is mostly new builds and remodels. They would like to grow the number Behavioral Hospitals they work with and expand their products and brand into more healthcare systems.
- Client folder:** Cases
- KPI's:**
  - # of leads: 150
  - # of Connects: enter number
  - # of Appointments: enter number
- Appointment Type:**
  - Phone
  - Webinar
  - In Person
  - Zoom/Tea
- Lead Pass To:** Click or tap here to enter text.
- Platform:** Outlook - Link can be found here.
- Time Zone:** Eastern Standard Time
- Meeting Format:** Phone Call (30 minutes) | Click or tap here to enter text.
- Target Market:** Behavioral Health | Facilities and Operations/Behavioral Health and Capital Planning
- Geography:** GA, VA, KS, MI, NJ, ND, NC
- Revenue:** Any
- List Information:** Original List Source: ZoomInfo | # of Contacts: 1502
- Sequence/Cadence:** Outreach cadence
- Special Data to Collect:** N/A
- Training Materials:** Messaging and Training

### MPI Quick Reference Guide

**Messaging**

- Script:** Live Message
- LIVE:**

Hi (prospect), this is (MPI rep) with Kingway Group. (personalize)

Great, I'm reaching out because I wanted to introduce you to our company. We make products for behavioral health facilities that help increase staff and patient safety. Do you have an inpatient behavioral health unit at your facility? How many beds do you have?

Are you someone involved in the decision making process for what products go into those units? (If they do have these units, skip the next question. If they don't, proceed to the next question.)

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How often do you perform audits internally?
- CLOSE:**

It's schedule some time between yourself and my colleague, Aaron. Do you have time next week on (DAY)\_\_\_\_\_ or (DAY)\_\_\_\_\_?

### MPI Quick Reference Guide

**Common Objections**

*We don't have a need right now.*

**Response:** No problem, could I send you my info for when a need does come up? Do they foresee any changes/repairs coming? When was their last joint Commission survey?

*We don't have the budget for improvements.*

**Response:** Understood, and is this something you see changing in the future? When do new funds get allocated & how? If an incident were to happen, how would that affect your funding?

*No time to do so our supervisor has to be used.*

**Response:** No problem, who would you suggest we speak with to start that process?

**Fear prior to the sign.**

**Response:** Understood, we are not the cheapest, but we do believe that we have higher quality, and as a result, safer products. Would you mind sharing with me which other company's prices you're comparing ours to?

**Talking Points**

- We understand the market as this is the only market that we provide solutions for.
- Having happy customers is our main global objective, we want this until they are happy with the solution we have provided. (if something goes wrong, we're on-site taking care of it)
- Working with health systems to create a solution specific to their needs
- International market, customers in UK and Aus
- Innovation, we are constantly innovating, which shows in the solutions we offer.
- With over 2500 projects completed globally, we have earned the trust of numerous health systems, resulting in repeat business. (Reference Pontiac case study)

**Voicecall**

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If you'd like to learn more, feel free to call me at (800) xxx-xxxx or reply to the email I sent to you.

Looking forward to hearing back!



**MPI Team includes:**  
A guide with contact info and their roles for all of the people involved in your campaign's success.

**MPI | MPI Team**

**Andrew Schwartz | Owner & President**  
andrew@mpi-impact.com | 262.387.4713

**Our fearless leader.** With an endless list of tasks, this business owner takes the initiative to be involved in the sales process and ongoing success of all accounts. Add in sales development, rep training, business vision, and making a fresh pot of coffee among other things, there is no doubt Drew will be available to connect with you when you need.

**Kelly Dusk | Key Account Manager**  
kellyd@mpi-impact.com | 262.387.4707

**Your go-to person** once the onboarding process is complete and your program goes live. This person ensures that your needs are being met, all key MPI team members are updated on your campaign, partners with you to develop and execute campaign strategies and report key metrics in your bi-weekly meeting.

**Jovana Cubric | Sr. Key Account Manager**  
jovanac@mpi-impact.com | 262.923.4644

**Sort of like air traffic control.** This person makes sure all the MPI team members that contribute to your program are running smoothly toward a successful campaign. They will contribute heavily to your campaign strategy, managing the SDR, QA, and data teams, and so much more.

**Evan Marsall | Onboarding Manager**  
evann@mpi-impact.com | 262.387.4728

**Spearheads the onboarding process.** focusing on the smooth introduction to the MPI team, your onboarding stays on track, and most importantly the creation of your Sales Play Book. This person will ensure a smooth hand off to your Key Account Manager once the process is complete.

**Kelson Kuzdas | Operations Support Manager**  
kelson@mpi-impact.com | 262.387.4730

**The wizard of data, systems, and process.** This person analyzes your prospect database, partners with you to make strategic recommendations advancing the use and quality of your data and assists in the setup of internal and client systems, develops scripting, and oversees QA for your program.

**Patrick Tate | Data Team**  
patrick@mpi-impact.com | 262.923.4608

**This team of virtuosos find the best contact lists** and work endlessly to make sure call queues and your data are in order. They will keep your data organized and make sure all the "techy things" are working like they should be.

**Erin Davis | Sales & Marketing Manager**  
erind@mpi-impact.com | 262.387.4729

**The master of messaging.** this person develops the 1:1 email messaging for your campaign. This messaging is aligned with your campaign goals and includes voicemail follow up, information requests, and nurturing emails.

**Sarah Koth | Marketing Team Lead**  
sarahk@mpi-impact.com | 262.923.4611

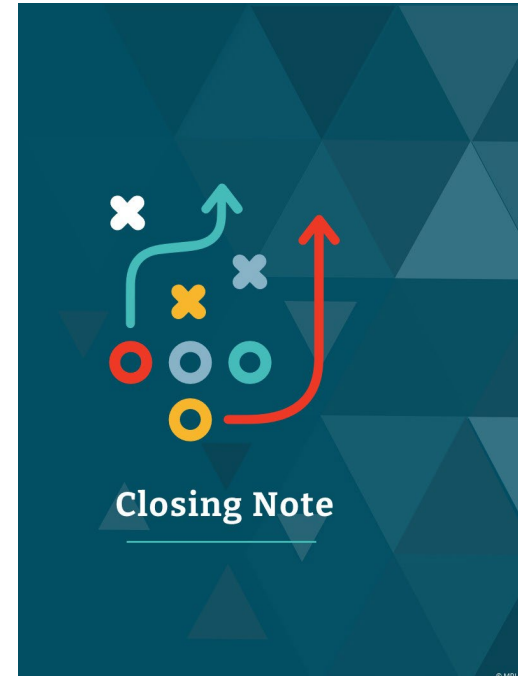
**As a guru of content development,** this person develops a sell sheet that aligns with your program's goals and direction. This sheet is typically something used in the 1:1 email messaging that is sent out.

**Taylor Davis | Sales Development Representative**

Your dedicated Sales Development Rep will be on the **frontlines of your campaign**, actively calling on your list of prospects. Our SDRs are measured both on quantity and quality of appointments. They will be fully immersed and act as an extension of your sales team.

**Kingsley | Office Dog**

Who doesn't love an office dog? Kingsley is our **unofficial emotional support dog** here at MPI. She brings her goofy and sometimes sassy personality to the office and can melt even the toughest crowd.



**Closing Note includes:**  
A letter from MPI's president, Andrew Schwartz

**MPI | A Note From Andrew Schwartz**


Mark,

*Thank you for your time and tremendous effort in working with the MPI team in providing critical information necessary to build out this sales playbook. We know that you will find this sales playbook to be a valuable tool to guide your lead generation strategies, filling the top of the funnel and building your brand awareness. This playbook outlines a detailed and comprehensive outreach strategy that will benefit the growth of your organization.*

*The next step is to execute together. This is where we will identify key learnings from the implementation process that will assist us in creating the most effective plan and strategy. When we go to market, some of these tactics will work as planned, but as we notice that adjustments need to be made, the MPI team will partner with you to analyze and identify the changes that need to be made based on our results.*

*We are excited for the implementation and execution of these sales strategies and for the success this may bring to your organization and team. We know this sales playbook will Make a Positive Impact on your organization's strategic growth.*

*Wishing you success in your sales goals and the MPI team is delighted to be a part of the process. The best is yet to come.*



**Andrew Schwartz**  
President, MPI