



# LICENSEE OPERATIONS MANUAL

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# INTRODUCTION

## WELCOME

Congratulations on your decision to become a Mindspan Licensee!

I have now chosen to grow Mindspan nationally by means of licensing. The reason why licensing was chosen was simple – the business is about people. If the business was to continue to grow it needed motivated, owner operators on the ground providing an excellent, personal and attentive service to our customers.

This Manual will tell you everything you need to know to run your own Mindspan business. If you have any queries on its contents or wish to discuss any aspect further, then please don't hesitate to contact me.

You are now part of Mindspan's future. I wish you all the very best of luck and look forward to sharing with you the benefits of our collective success.

Gavin Drake  
Founder and Managing Director.

## WHAT IS MINDSPAN?

Mindspan has been at the forefront of mindset, attitude and psychological development training for over two decades. Demonstrating the fundamental link between a person's psychology and their success. Using a tried and tested formula, delivering coaching and training programmes that significantly impact performance and benefit the success of our clients organisations.

## VISION, MISSION & VALUES

### Our Vision

To positively impact ten million people with our Mindspan principles

### Our Mission

To inspire individuals and organisations to higher levels of performance and fulfilment

### Our Values

#### GROWTH

Personal, team and client growth & improvement is at the heart of everything we do.

#### AUTHENTICITY

We live, breathe and role model the Mindspan principles.

#### HUMILITY

We know that the work we do and subject matter we share is much greater than we are.

#### ENJOYMENT

It's highly important to us that we maximise our time doing what we enjoy most.

#### CLARITY

We always work to create personal, team and client clarity of purpose. What are we doing and why are we doing it?

#### MEANINGFUL COMMUNICATION

We provide answers that matter both to each other and our clients.

#### CHALLENGE

Constructive, respectful challenge is at the heart of our culture and performance enhancing principles.

## THE OPERATIONS MANUAL

This manual and the Mindspan training available to you, will set out all of the processes and procedures which you, need to know and follow to become a thriving Mindspan Licensee.

The system has been developed over time and as a Licensee you will have the benefit of the valuable experience gained over that period.

It is important that everyone who works within the Mindspan network understands the value of operating according to the system. Sharing our methods and experience will enable you to establish a successful operation quickly & efficiently.

### This manual serves the following purposes:

- Training our Licensees
- Defining Mindspan's operating methods and system
- Setting Standards
- Monitoring performance



This Manual should be your first source of information about how to operate the system and should be used by you, to monitor performance when implementing the system.

If the specific question you have is not covered in the manual, it is likely to have been covered in training, in which case refer to your training work books, or failing that, please contact head office for guidance.

Having established a successful method of operation, it is our responsibility to pass on to you, in a structured manner, this method of operation and the benefits of our experience in a form that you can take and use in your own business.

### We have chosen to do this in three main ways:

- The Licence Operations Manual, which contains detailed instructions on how to develop and run the business based on our current business activities.
- Initial and ongoing training, which may take place at head office or other suitable location. We will look at the Mindspan Licence system, including the courses to give the licensee an in depth understanding of what they will be selling and delivering.
- Ongoing support and development through the Licence Support Team

### In return for this we have a right to expect you to:

- Develop the business using the system outlined in the Operations Manual and the Licence Agreement.
- Maximise the potential of your business through effective business planning and a willingness to grow your business through the development of new business and maintenance and growth of established customers.

Enhance the goodwill attributing to the brand by ensuring that services are provided to the standard laid down in the manual and elsewhere and by doing nothing which might have a detrimental effect on the brand's standing in the Licensee's local area or elsewhere.

## GETTING STARTED

### MINDSPAN SYSTEM

MINDSPAN has developed a successful and efficient business model designed to assist your business in achieving its objectives and to become a successful and profitable Licensee.

This section of the Manual describes the process of setting up and launching a Mindspan Licence Business.

When setting up the business it will help you, us and the network as a whole if you follow the system and draw on all of the support and collective knowledge available to you.



### LICENSEE QUALITIES & RESPONSIBILITIES

You have been chosen to be a Licensee because of the qualities you demonstrated during the recruitment process.

It is these qualities that we would expect to see demonstrated in running your business and that you will require to be successful.

We all have a role to play in the success of the Mindspan Licence system – we are interdependent. This means that you have a wider responsibility within the system beyond your own goals and objectives.

### You have a responsibility:

- To us, to develop and run your business to the best of your abilities.
- To other Licensees, ensuring your actions compliment and enhance Mindspan and the reputation of the system as a whole.
- To all of the customers and others who come into contact with Mindspan through your business.
- To the brand – the most valuable asset of any modern service business.

**We are a team. As you begin the process of setting up your business please remember - you are now part of that team.**

## TERRITORY AND TERRITORY RULES

There is no allocated area allowing you to approach prospective clients both nationally and internationally. Be aware to check that all new clients, are not already or previously engaged with another Mindspan licensees.

## PREMISES

The great thing about being a MINDSPAN Licensee is that you can work from home. To operate in a 'home' environment you should ideally have a dedicated workspace or desk with electrical and telephone points.

A quiet environment will be necessary for making and receiving telephone calls and to achieve the required level of concentration.

When coaching, you and your client will decide upon an appropriate venue for your sessions that enables private conversation and the facilities you'll need. When training, your client will normally book and pay for the venue although sometimes you may have responsibility for this. This will likely be an external venue such as a hotel, meeting venue or conference centre.

To ensure the smooth and effective running of the course, the training venue should ideally:

- Be self-contained
- Be quiet
- Have toilet facilities nearby

You should also provide refreshments for two coffee breaks per day and a lunch break.

The room you're using should ideally be:

- Up to 15 participants - 'U' shape layout/2 x flipcharts/projector & screen/pull up banners/delegate packs, materials/pens/ extras
- More than 15 participants - 'Cabaret style layout/2 x flipcharts/projector & screen/ pull up banners/delegate materials
- Ensure you have appropriate resources and contingency plans – have your powerpoint on memory stick and take the relevant VGA/HDMI adaptors

## BUSINESS EQUIPMENT

It's important to have the right business equipment (hardware & software) by which to perform your new role and have purchased ready to us before you commence trading.

Each Licensee will require:

- A laptop and or tablet, running Windows with Microsoft Office software pre-loaded
- A top quality anti-virus product
- A data storage/backup facility
- A business-quality printer
- A broadband line
- A mobile phone



## TELECOMS

Where geographically available you need to subscribe to a Broadband internet and telephone service.

The office telephone system must have an answer phone and be capable of storing a recorded message for times when you are unable to answer during the day or out of hours.

A mobile phone is also required, again capable of taking messages and leaving a pre-recorded message for callers at times when you are unavailable.

The above items must be sourced and operational before commencement of trading.

## VEHICLES

It is not a requirement of the Licence to operate using an approved vehicle. Licensees should nevertheless be aware that vehicles have the potential to be an important factor in how people perceive our brand. It is therefore essential that any vehicles used while on business represent the Mindspan in the best possible way. In other words, smart, clean, and presenting a positive, business like image.



## OPENING SUPPLIES

You will also be required to hold sufficient quantities of stationery and marketing materials on commencement, as itemised by Mindspan head office.

Templates for general business stationery including business cards, letterheads, and compliments slips are provided by Head Office.

Where possible we aim to digitalise as much Mindspan content as possible and will hold it in a shared, secured system for licensees to access. Where only 'hard copies' are available these course materials can be ordered, so there is no requirement to hold 'shelf stock'.

## WEBSITE

We shall maintain and manage the Mindspan website for the entire Licence system.

In the interests of consistency of the brand and the message we are promoting, you should not develop your own independent website or promote yourself over the internet without our consent.

## APPOINTING AN ACCOUNTANT

We would advise you to appoint an accountant at the very start of the process and not leave it to when needing to file your first tax return. You may already have somebody that you use or accountants in approved providers list.

Accountants will be able to assist with the following:

- Company Formation
- Company Law
- Financial Accounts; Accounting records, Annual returns, Directors duties.
- VAT; Registration, Bookkeeping, Expenses and Legal requirements.
- Annual Accounts; Accounting systems/records, Audit, Company account format, and Filing requirements
- Corporation Tax; Computation/Self-assessment, Profit adjustments, Rates of tax, Payment dates, Filing returns, Tax planning

It's essential that you keep accurate records, both to comply with your legal obligations and as a management tool to assess performance and take corrective measures.

## LEGAL ENTITY

You can operate as a limited company, a limited liability partnership (LLP), or as a sole trader. Your accountant will advise you as to whether one option is more advantageous for your specific set of personal circumstances.

Should you opt for Limited Company status you should be aware that the process of setting up a company may take a little time. It can be a quick and cheap option to buy an off the shelf company, but further administration may be needed. This is likely to include notification to Companies House of trading name, shareholders, directors, company secretary and accounting year end.

## REGISTERING FOR VAT

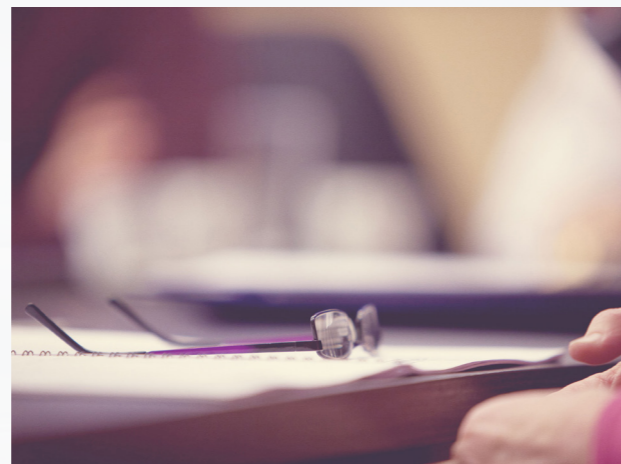
Having set up the legal entity that is to trade as your Licence, the next step is to register for VAT. You may choose to register even if you are trading or plan to be trading under the statutory VAT thresholds.

Again, you can ask your accountant about this, register on-line or contact HM Revenue and Customs direct. It is a relatively straightforward process that needs to be completed as soon as possible so that your stationery and anything else that might carry your VAT number can be printed.

If you are setting up a limited company, you cannot use the words 'MINDSPAN' in the company name, but your Licence with us will allow you to trade as 'MINDSPAN'.

We will need to be aware of how you wish to set up prior to commencement of your licence.

You have a responsibility to comply with all legal requirements concerning your business from the outset. Some of the relevant legislation will be covered during training. However, this cannot be relied on as a complete picture and it is your responsibility to ensure legal compliance within your business.



## APPROVED SUPPLIERS

We have compiled an approved supplier directory that is available to access for key services across your business. From time to time we may appoint exclusivity to a group of approved suppliers for a particular product or service. This will always be in the best interests of you and will offer preferential price and or service.

Our approved provider directory is updated regularly and held in a shared location.



## INSURANCE

It is your duty to put in place all insurance cover required in running your business prior to beginning to trade. To ensure that this important element of the system is being complied with, we will ask to see copies of current policies annually.

Insurance required will include (but may not be limited to):

- Employer's liability - £10M
- Professional Indemnity £1M
- Public/Products Liability £5M
- Equipment
- Vehicle (covered for business use)



You should take professional advice in this area, using a reputable insurers liability and we have insurers in our approved supplier's directory.



## MY MINDSPAN PLAN

Upon applying to become a Mindspan Coach you will be required to prepare 'My Mindspan Plan', detailing how you will make your licence work for you. We will provide a template and support in how to put this together.

My Mindspan Plan will look at 4 key areas, Marketing, Sales, Delivery and Finance.

By preparing a plan in this way it will:

- Help all parties understand and evaluate your proposal.
- Provides clear direction, giving you measurable milestones as you grow.
- Gives you clarity in the processes required to be successful.
- Raises any gaps or areas to improve in knowledge and understanding.
- Provides benchmarks to compare actual performance.
- Identifying any funding requirements.

It is important that you take time to carefully research and complete your plan. You must take ownership of the contents and be confident that the plan is factual and achievable. It should however challenge and stretch you.

My Mindspan Plan will include the following:

### 1. EXECUTIVE SUMMARY

- (We have provided this for you)

### 2. ABOUT YOU

- Your WHY
- Your Vision
- Your Goals
- Experience and Successes

### 3. MARKETING

- Who and Where is your target market(s)?
- What size is this target market(s)?
- What is your offer to these target market(s)?
- How are you going to reach your target market(s)?
- What is your key messaging?
- Who is the competition and how do you differ?
- How can you leverage a national brand at a local level?

### 4. SALES

- How will you follow up leads?
- How will you maximise your conversion of leads?
- How will you make sales proposals to customers?
- How will you review with customers?
- How will you follow up previous customers?

### 5. DELIVERY - PRODUCTS AND SERVICES

- Describe the benefits of the products and services you offer?
- Describe how you will maximise product impact with your chosen target market?

### 6. FINANCE

- Complete the template P&L and assumptions
- Provide a brief summary of your financial projections and any funding you may require



My Mindspan Plan should be an evolving document and you should review and update your plan periodically, we suggest every three months. Include the years objectives, what action will be required to achieve them and allow you to benchmark performance.

## BUSINESS CHECKLIST

**We have templated a business checklist to assist with the task of setting up your business and preparing to trade, as efficiently as possible.**

The next step is to assess how long each action will take to complete, who is responsible, and in what order they need to be completed, in order to achieve the proposed launch date.



# THE OPERATING SYSTEM

## THE MINDSPAN CONCEPT

**We have spent some time developing an operating system designed to make your life as a licensed Mindspan Coach as effective and cost efficient as possible. Allowing you as much time to focus on having the biggest impact possible with your clients.**

This Manual and the accompanying training courses will demonstrate what the operating system is and how to implement it. You will notice as you move through it, its designed not only to benefit you but to leverage the whole Mindspan network.



## SERVICES

**We are a professional company with a recognisable range of branded services. This is a major part of building brand security – our customers know what our offering is and trust us to deliver it.**

**You must only provide the range of services and products specified by head office under the Mindspan brand. Whilst you may have other business interests, Mindspan services should maintain the brand identity, to avoid any dilution and confusion.**

**If opportunity arises with larger contracts, you can invite fellow Mindspan colleagues to deliver with you. This may be to fulfil the volume of the contract or to utilise other coaches' skills and or niche.**

The Mindspan system enables you to market and deliver training programmes aimed at personal development and performance enhancement in the workplace. This could be in a variety of settings, working with individuals or groups, private or business, in the commercial, public or charity sectors. Whilst every client and business is different, the same fundamental building blocks apply to working with each and everyone.

## THE MINDSPAN MODEL

We have 3 tiers of Mindspan licensee, designed for you to progress or specialise at your chosen level.

### Mindspan Coach

The introductory level is the Mindspan Coach designed to support individual clients across all sectors. A Mindspan Coach is trained in our methodology and able to apply to their chosen field of expertise.

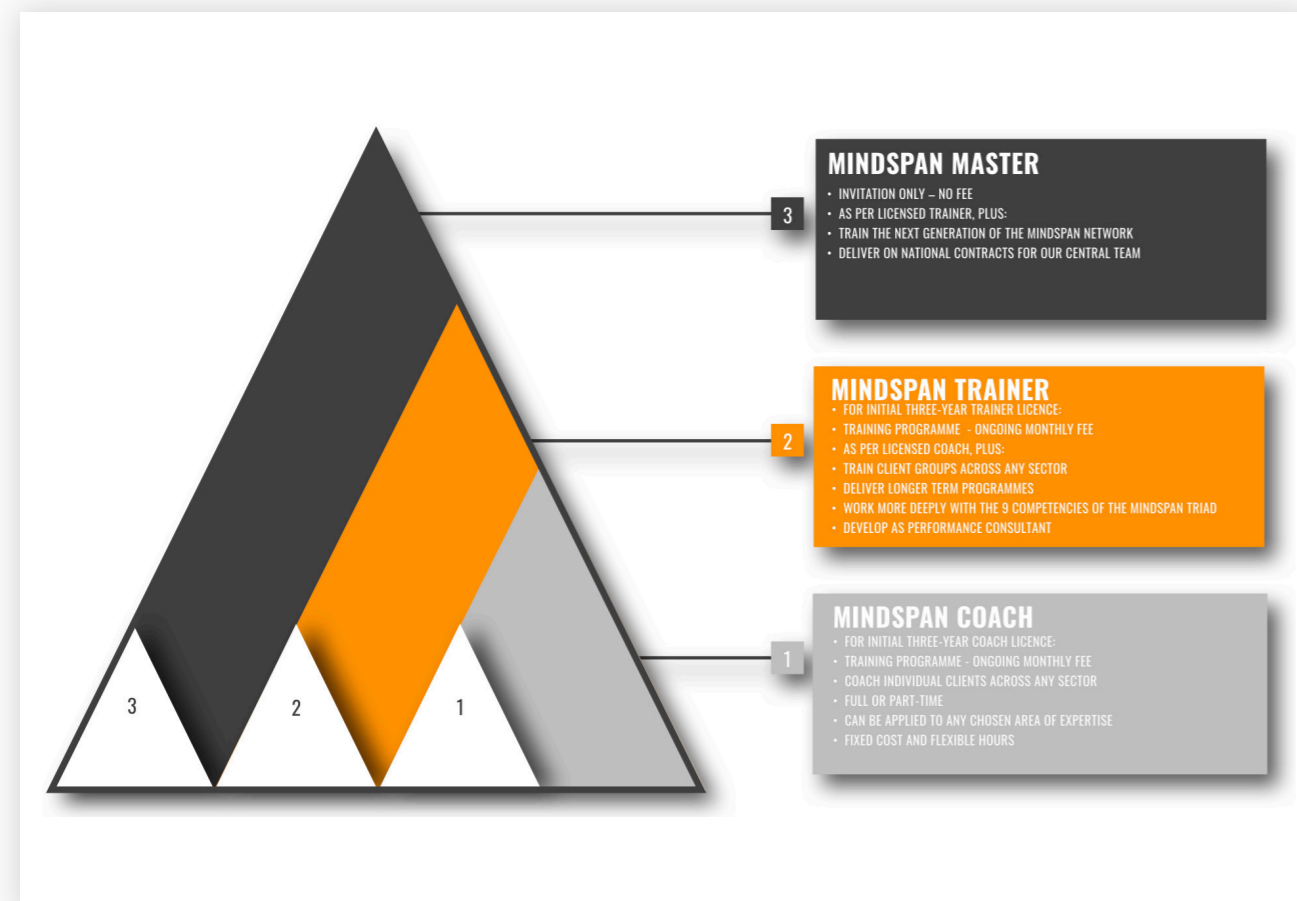
### Mindspan Trainer

At this level you will be able to train groups of individuals as part of a wider programme, this maybe as a days training or over a much longer programme of study. These groups might be a collective with shared professional goals (i.e. a department or team of a business) or they could all be at the same stage of their professional journey (i.e. junior managers of different departments gaining competency in leadership).

The training at this level looks more deeply at the 9 competency strands of the Mindspan methodology.

### Mindspan Master

This invitational level is for established Mindspan coaches & trainers who will now train the next generation of the Mindspan network. These could be sessions delivered at induction, training events and conferences. Mindspan Masters will also deliver on national contracts for our Central Team.



## MINDSPAN DATA

We take data collection and processing very seriously, complying with all GDPR principles and practises. We manage our data and content with 2 key pieces of software, Microsoft Teams and Agile CRM.

### Microsoft Teams

Teams is our principal file sharing facility. This tool helps you to work on Word, Excel, or PowerPoint shared files without leaving its interface. You can collaborate on the go, using Microsoft Team mobile app.

Here are a few things you can do with the File Sharing function of Teams:

- Upload files to a shared file storage
- Edit files on Team apps
- Collaborate in real-time
- Share files with members outside your organization

### Agile CRM

Customer Relationship Management (CRM) is a key feature for any business looking to communicate to customers, managing the process from marketing, prospecting, and repeat business.

All of our client data is stored in our CRM and we contact customers centrally using this system only. All data is tagged for the purposes of marketing, user preferences are saved and all clients have the opportunity to unsubscribe at any point.

Please do not store Mindspan client data in any other format or using other types of software. It is vitally important that all data is housed in one place and marketed/communicated to from one central source. You are of course permitted to contact clients via email and phone individually when prospecting or maintaining an operational relationship.

## DEVELOPMENT

We will be looking at the development of a Learner Management System (LMS) that will allow us to have more digital interactions with our customers, collating more data at source. Over time we also aim to digitalise our content and supporting tools for online completion.

You will be fundamental in its development, with regular opportunities to feedback on the potential advancement of additional features. We will then devise an annual schedule of improvement, to evolve the system to meet the requirements of network.



# MARKETING

## THE MINDSPAN MARKETING CONCEPT

Marketing is the life blood of what you do but performed with thought and executed with skill it doesn't need to cost you thousands of pounds to obtain new customers.

**Mindspan gives you a number of advantages in this area:**

- A strong brand (and clear guidelines)
- A marketing system to follow
- A social marketing media guide (multi-platform)
- The availability of marketing materials and designs
- A network to leverage one another
- On going support from national brand campaigns

Marketing is a discipline that must be carried out professionally on an on-going basis, just because you may not need new customers now, doesn't mean that should not always consistently market what you do.

## THE BRAND

Brand image represents the perceptions customers have about a company and its products and services. The customers' perception or brand image of the company will affect behaviour accordingly. A strong recognisable brand with a good image will enhance business while the reverse is true of a poor brand image.

This is why we have spent so much time, care and money in developing the Mindspan brand and why strong brands are so highly valued. We've made it really clear and easy for you to follow as well; the most trusted and high valued brands have salience across all their touchpoints so it's really important that you follow our guides.

Our goal is to build a brand image that is instantly recognisable, appealing and which helps us to gain customers, repeat business and referrals.

The brand reflects our core values and it must be delivered consistently. We must build a level of expectation in our clients and meet these expectations at a consistently high level.

When we achieve this, we will be providing our customers with something they value very highly – brand security.

That is to say that when they have contact with any Mindspan representative, no matter where they are, they know exactly what to expect and the level of service they will receive.

We have taken the time to collate a Brand Guidelines document to accompany this manual. We insist that you read and follow this guide as it provides detailed best practise on using the Mindspan brand.

You represent the brand every time you deal with a potential customer, existing customers and through all your marketing activity.

## TARGET MARKET

As part of Your Mindspan Plan, you will have already given significant thought into who or what your intended market(s) will be. This is a crucial phase in developing your strategy and from here you can explore the most effective ways to reach them.

The effectiveness of any marketing depends largely on it reaching the people you want it to. Before engaging in any marketing think about whether it will reach your target market and whether it will do so cost effectively. Use your market research to identify your targets and when assessing which type of marketing might be the most impactful.



## PLANNING

Revisiting your planning around marketing annually is an important exercise. Your target market may have become more niche or broader, new mediums may have become available particularly digitally, or you may want to scale up or scale down your marketing activity. If planned correctly all these decisions can be taken and new strategies planned accordingly.

There is a tendency in small business to market reactively. For instance, when sales are down – which of course is too late, and you will suffer a down turn in business while playing catch-up with your marketing.

Marketing is about momentum and building awareness over time. It should be an on-going activity regardless of the state of the market or how busy you are at any given time. The best time to market? All the time!

Planning also helps with budgeting. If you know what you are going to spend on marketing in the coming year it makes the financial planning process that much easier.

Whilst there will always be on going paid national marketing campaigns for Mindspan as a whole (which directs people to the main website where your profile can be found), we also provide you with the tools on how to run simple and more localised marketing campaigns. Not only this but we also provide you (regularly) with guides and information on how best to organically (no spend required) market across both digital and offline platforms.

## MEASURE THE RESULTS

The American industrialist Henry Ford once said "I know 50% of my advertising is working. I just don't know which 50%."

Whilst you will not have the complexities of marketing that some larger businesses do, that does not mean we should not measure the impact of the marketing we do carry out. It's important for you to learn what works best (over time) for your target market. Different demographics will be more susceptible to different messaging and marketing channels (our guides help with informing you on this). But outside of our information, you'll learn nuances that are specific to your Mindspan Brand and it's important you are always looking to monitor and improve.

The process of measuring simple information such as how many phone calls it takes to get an appointment and then how many appointment it takes, on average, to achieve a sale will enable you to build an accurate picture of how cost effective one method of marketing is against another. With a little extra effort, you can determine which marketing produces the best response and reposition your budget accordingly.

## YOUR POWERBASE

The simplest way of creating opportunities will be 'talking to people'. People who can either provide business themselves or know people who can. It is also all about personal motivation, having an organised, well structure approach – 'making it happen'.

Don't underestimate the importance of starting close to home 'Your powerbase'. Family, friends, former colleagues, peers, past customers and suppliers, all can be contacted informally via phone or email explaining what you are doing, for direct business or contacts they might have.

Contact businesses in sectors in which you have some experience. For example, if your background is in banking then contact some banks or financial institutions. You speak their language, know how they operate, understand their issues.

Be sure to contact the right person and a bit of research maybe required. Decision makers in our field are often training managers, human resources personnel, department heads, and managing directors.

## LOCAL MARKETING

You are responsible for marketing your business to your chosen markets and prospective clients. Whilst you will benefit from the leverage of the entire network's marketing, the speed and scale of your growth will depend on your planning and execution in this area.



## NETWORKING

Networking can be an enjoyable and highly effective method of marketing your business. Business breakfast and luncheon clubs have been established across the UK to enable businesspeople to meet in a convivial atmosphere outside normal trading hours for the purpose of cross-referring business to each other.

Some of these events are organised by local business groups whilst others are part of national networks such as BNI and Business for Breakfast.

You should, however, choose your events carefully. A BNI business breakfast club in a small town, for example, is likely to be attended by the local butcher, baker and candlestick maker. To meet your target audience you may have to find a group in a larger town where the attendees represent larger businesses and organisations. These could be through the Chambers of Commerce, Businesslink events, and the Institute of Directors.

## SOCIAL MEDIA

Social media marketing is sure to be at the foundation of your marketing plan and we will be driving a large proportion of our Mindspan central marketing through our social media channels.

Selecting the right channels to focus on is critical, as some will be better suited to your target audience than others. We will of course support and advise on this from the outset with you.

We would advise on being regularly active on no more than 3 social media platforms. You may have presence on more, but to build a good level of consistency in the content you post, it's important to be dedicated to your most effective channels.

We will reposition content through our national channels and will provide links to your Mindspan branded channels through our website.

Content should be carefully planned, with a clear call to action for the potential prospect to engage. Posts should be consistent, there is little point in posting three times in one day, only not to post for the following three months!

We have an additional guide to support with your social media strategy [Resource Available] and will be bring you regular Social Media market updates quarterly so you are up to date with the best information on how to reach your audience.

Not only this but alongside providing you with a bank of refreshed posts quarterly which can be used for social media, we also provide you with bespoke posts for YOUR brand (e.g. if you were running an event we can create you a branded post).

## REFERRALS & TESTIMONIALS

By the far the best form of marketing is a referral from an existing customer because the hard work has already been done for you. Somebody sharing the impact you and our services have had on them is a very powerful thing and why would they not want someone they know benefiting also.

So with that in mind, why do some many of us forget to ask for referrals? Largely because it's not part of the plan in the first place. It's perfectly acceptable to ask a client after a period of time together, 'Who do you know that could also benefit from the work that we do together?' At worst it will spark some thought on their part.

Written testimonials are good but video ones are even better and can be used in many ways. We can also leverage this content for you through our National channels. Many social media channels have a testimonial mechanism built into them, and where possible these should be maximised.

One of the easiest ways to get a video testimonial is letting your clients film themselves on their phone – even in selfie mode! By stitching together multiple user-generated videos you can create a really impactful "mini ad" for your services to post on your social media.

## TELESALES

Telesales remains both a cheap and effective way to make first contact. This can be outsourced or an activity you take on yourself. Telesales can be a good way to make first contact and can be more effective than just sending information via a mail shot.

Be sure to research who you may need to speak to as you will often be greeted by a receptionist who may be tasked with filtering out telesales calls. Your first call maybe for research only, in order to send information, the receptionist is very likely to give you that information.

## EMAIL

A well written email can still go along way as introduction to you and the brand. Make sure its personal and that it is sent to an individual, that way you can specifically follow up with that individually, even they are only directing you to another contact.

If the email is the first contact you are having with the prospect, don't try to sell too quickly. Use it as an introduction and follow up with a call or 2nd email.



## POST & LUMPY MAIL

Mail shots are great way to introduce yourself and Mindspan to a company and should be part of your marketing mix, however in isolation they can't be relied upon to gain new customers.

Think of different ways you can engage new and previous customers with lumpy mail, larger envelopes and small packages tend to get opened and then contents may get hung on a wall, sit on a desk or be used by the prospect. This can be more expensive and shouldn't be done on mass, but when planned as part of a strategy can be very effective.

**All brochures and leaflets must be put in to the Mindspan Branded format & so we offer a free design service of your content. Just let us know at Head Office what you'd like created and we can put this together for you. If you don't have it designed using the free service at Head Office, your materials still need to be signed off by Head Office to ensure they are "approved" and branded appropriately.**

## PRICING

There are a number of issues to consider about pricing as discussed below, but in essence, one of the main benefits of being a Licensee is that you have the ability to compete in the market place using the brand, rather than competing on price alone.

**In addition, you should not undervalue the fact that you are providing premium quality coaching and training that are in demand and will provide substantial benefit to the participants. There is real value in what you are offering.**

We will provide strong recommendations about the level of pricing you should adopt. This will be determined by our knowledge of the marketplace to assess what price-levels the client base will bear and with the goal of ensuring a healthy margin for you.

**Whilst the final decision on pricing is yours, there are some very compelling reasons to maintain prices and not undercut and compete on price alone. These are:**

- So that your business can be profitable
- To demonstrate consistency across the Mindspan network
- To maintain the image of the brand as being of high quality
- To avoid price wars with competitors

Ultimately the pricing decision is yours (except where you accept the terms of a promotion), and our role is simply to advise you as to what is sensible business practice based on our experience.

## PUBLIC RELATIONS

A highly cost effective means of promoting your business is PR. Local news papers, trade press and other media are always on the hunt for a good story and a well written press release could get you valuable coverage.

**Head office may be able to assist you with press releases and stock press pieces or articles for you to use.**

**Here are some tips to improve your chances of getting published:**

- Choose the media most likely to carry your press release. Select those that carry similar write-ups on a regular basis.
- Try to enclose some form of photograph, and if it has some real local interest angle so much the better.
- When drafting a press release, keep it short, relevant and to the point.
- Always use a cover letter of some kind. It pays to call ahead to find out the name of the person you should be sending your press release to.
- Use the proper press release format, complete with a headline that will interest the person deciding whether or not to use your item.
- Be sure your press release is letter perfect - no typos or misspelled words.
- Don't photocopy - always have each letter or press release individually typed or printed.
- When your item is used, send a thank you note or call the editor on the phone and thank him for using your press release.
- Never call or write to an editor demanding to know why he did not use your press release, why he had it rewritten or cut it short - just try, and try again!

**Generating PR is hard work and there is no guarantee of publication or success. In some cases you may have to "Buy" PR with an attached advert – so if you are planning any advertising always ask if you can send in an accompanying press release.**

## NATIONAL PROMOTIONS

From time to time, we may enter into national or regional promotions offering the same terms across the Mindspan network.

The object of such a promotion would of course be to generate business for everybody and would likely be for new products or services.

It would also send out a wider message about the size and power of the network and help develop brand awareness, to everyone's benefit.

Therefore, you would be expected to participate in any such promotion.



## MARKETING MATERIALS

Various marketing materials will be made available to you through Mindspan head office and approved suppliers, which will change and develop over time. These have been designed by professionals and comply with our brand guidelines. They are based on the collective experience of the network and are known to be effective.

We would encourage you to use these materials as part of your marketing effort and guidance and advice will be given on the most effective ways of implementing them.

All approved marketing materials will be saved digitally on our file sharing platform.

If you feel the need something developed for your marketing requirements, then please contact Mindspan Head Office to discuss.

## MINDSPAN WEBSITE

Mindspan Head Office will develop, maintain and manage a central website and relevant website domains for the Mindspan network.

We will market you through this site and will link to your active social media accounts. You will be asked to provide profile bio and photograph for use on the site (we will send you the specific sections for this once signed up). We will also drive all lead generation activity via the site and our CRM to obtain data for follow up. Essentially this "landing page" for your profile will be your own mini site for what you do.

You should not develop your own website or market yourself over the internet without having first sought the approval of Mindspan Head Office.



## MARKETING RESPONSIBILITY

The responsibility for the marketing function of your business is yours.

We are here to provide support, advice and guidance. From time to time we may organise central marketing activities and may make certain marketing materials, designs and templates available to you that may or may not have a cost attached to them.

You will also of course, derive spin-off benefit from the marketing activities of the rest of the network and may also gain the benefit of joint marketing efforts and bulk buying discounts where appropriate.

However, the prime responsibility for marketing your business is yours and the success of your business will depend on it.

We are here to help – if you have any questions about any aspect of the marketing function please contact head office



# SALES

## THE MINDSPAN SALES CONCEPT

A common question asked from people who aren't used to directly selling their products and services is, **how often should I sell? Look at it like this, if you are not selling, you are at absolute best staying the same size.**

Selling shouldn't be viewed as sporadic on or off process or something to be feared. When performed well it's an opportunity to spread awareness, build relationships and provide solutions to your customers problems.

We are incredibly fortunate at Mindspan that what we do doesn't require a 'hard sell' and that we have countless examples of the huge impact that our services have on individuals and businesses.

The following fundamentals if followed will assist you with formulating your sales processes.

## THE SALES FUNNEL

There are 4 key stages to the sales funnel:

### Stage 1 Awareness

No individual or company can buy from you if they don't know who you are or what you do. To be considered as a purchase, you must first generate awareness of you and your services. This can be built over a long period of time and requires thought of first 'WHO' you want to get in front of and 'HOW' you want to get their attention. Often a potential customer may not be looking for your services at the very moment you make contact, however being in their conscious mind when they do is crucial.

### Stage 2 Leads

A lead is an individual or company that has shown interest and or responded to some form of marketing activity provided to them. This could be just a general enquiry or a specific response to a campaign. Leads need to be followed up quickly and professionally, they may be talking to other providers and you could be part of a procurement process.

### Stage 3 Prospects

A prospect will have had a meeting, webinar or telephone conversation with you and be offered some form of proposal. At this stage it's important to start to build trust and rapport, being sure to offer solutions to your prospect's needs.

### Stage 4 Customers

Anybody who acquires your service becomes a customer, however this is where the hard work begins. A customer that is treated well, experiences high value delivery and customer services will likely engage with you again and again. This can happen even if they change to another employer, they are also likely to refer you to other colleagues and peers.

**You can't manage what you can't measure, so it's vital that each marketing campaign's success is measured against its purpose. Think about what information you may need at each stage of the sales funnel to effectively measure success? Understanding the conversion flow from one stage to the next is crucial in determining what is and isn't working.**

Regulating the flow of the sales funnel is critical to keep the business growing and to prepare for the operational resource needed to support it.

## THE SALES BANK

You wouldn't expect to make a withdrawal from a bank account without first making a deposit so why do we expect to make a sale without investment first? Even when building awareness, you should add value for the recipient, this could be insight of our industry or something more tangible.

If you take time to invest in the relationship at every stage this will usually return dividends later. Customers who feel they have had great value from your relationship will be the ones that provide testimonials and referrals for you.

## UP SELLING

**You are 7 times more likely to sell to an existing or former customer than a new one and it's cheaper too.**

Customers may well be willing to spend more money with you and acquire more of your services, here are some common reasons why they don't, and what you should ensure against in your processes.

- Not aware of the full range of products and services available
- Not aware of complimentary or follow on products and services available
- Assume your service is a one-off piece of work
- Assume the impact of the service is limited to one department/area of the business
- Don't have the impact of the work measured or showcased to them

Customers relationships should always be reviewed periodically, and we recommend at least annually, opportunities could be there for you to capitalise on.

In addition, revisit old leads, prospects and customers. Needs can change all the time and getting back in touch could again create new opportunities, but at the very least will put you back in their conscious mind.

- Business may have grown
- Business may have new decision makers
- Churn of staff
- Coming to the end of supplier agreements and contracts
- May have had a poor experience with a competitor



## INTRODUCTIONS

A first impression can be formed in as little as 7 seconds so it's vitally important to get off to the right start. Increasingly more business is conducted via webinar before meeting the customer in person, so think about how the following also applies to the digital world.

### Punctual

Sounds obvious but be where you are supposed to be early and prepared. Being late invariably leads to you feeling flustered and this will certainly come across in a meeting.

### Research

Know who you are going to talk to, find out what you can online and understand what industry they operate in. They may be indirectly testing you on this, during the meeting.

### Appearance

Business attire varies depending on the industry you are meeting with and again it's important to know what that looks like. However, be professional and presentable at all times as remember, you are what you are selling.

### Body Language

Have an open body language and where possible don't have barriers between you and the customer. An open body language will allow you to be more expressive and to articulate your proposition, as they will need to picture you coaching or training them or their team. Maintain good eye contact too, it demonstrates you are listening, a key part of the sales process.

### Be Polite

Good manners and professional courtesy go a long way and will always be remembered, humility is a core value at Mindspan.

### Build Rapport

People buy from people so finding some common ground or interests can be beneficial in building that. Asking meaningful questions throughout is also important, as it makes the meeting a two-way discussion and not a sales pitch.

### Demonstrate Knowledge

Be informed, be credible and demonstrate your expertise and knowledge in your subject area. The customer should feel that you have more knowledge on the subject matter than they do but be very careful never to patronise or insult their intelligence, again this is where clever questioning can be useful.

### Be Visual

People also buy what they can see, so use all the resources available to you. These could include brochures, diagrams (Mindspan Triad), data, video, website, sample content, case studies, testimonials and referrals.

### Tell to Sell

Tell your story and share the Mindspan journey, the passion you demonstrate will resonate and demonstrates why you do what you do and the fulfilment you get from your work.



## NEEDS ANALYSIS

A needs analysis should be conducted with every prospect. Often prospects can think they know what they want, but you may have a better solution for them. They may also not be aware of the full breadth of the Mindspan offer or hadn't considered the wider impact possible.

At this stage of the process you should ask lots of open questions, listen carefully to the answers provided and if possible, take notes.

## PRODUCT SOLUTIONS

Always provide a solution to a problem not a product. Explain the benefits and impact your services provide.

### Example 1

A customer has an issue with time management and is struggling to prioritise workload and family commitments. It might be that some coaching around Focus is required (product) but what benefits, and impact will this training have (solution). Put them in a place where the training has already taken place, what will you have covered and how will this now be helping their lives?

### Example 2

A business owner has a team lacking in confidence and morale. You will have lots of training products that can support them and their team but think about what they will want as the outcome of the training. Increased productivity, improved wellbeing, a culture of taking ownership and responsibility or maybe a reduction in absenteeism.

Drawing from the answers given from the needs analysis questions will help shape this part of the process and allow you to tailor the proposal specifically to the needs of the prospect.

## PROPOSAL & CLOSURE

Always forward a proposal in writing, this gives the prospect time to review it and ask any questions. It also allows you to be clear about your offer, pricing and any follow up.

Prior to completing a proposal, always agree on a suitable time to review it either in person or over a webinar. This is vital as it allows you to deal with objections personally, so assumptions can't be formed.

Once you have agreement, ask them politely if you have their business, if you do then action the following:

- Complete the Confirmation of Booking Form with Terms & Conditions and sign it
- Send it to the client for them to sign and return it to you
- Agree your milestones and review meetings
- Don't be afraid to discuss future opportunities
- Now you want to make them as a lifelong customer!

If they have more objections you can deal with them then and there or they may want to speak to somebody else or need more time. Always agree a time to revisit so that you can follow up and remain in control of the process.



# DEALING WITH OBJECTIONS

Turning a negative into an opportunity is a skill to be practised and can easily be role played with friends and family.

Sometimes it can be a case of going back over the needs analysis to check that you have fulfilled the brief. It's possible the prospect hasn't given you all the information first time around and or the situation has changed e.g. budget cuts or increases / changes in personnel.

Never disagree with the customer, it's the quickest way to destroy rapport. Look at this example.

*Prospect: From my research I think you are expensive.*

To disagree here would suggest that the prospect is wrong and that their research isn't accurate, immediately alienating them. Instead try...

*You: I agree, our services do cost more than the vast majority of other providers out there, however we have good reason for this as our service has the following...*

The client can't be offended by this as you are agreeing with them and you can take the opportunity to highlight the difference in your service to others and the added value they are paying for.

# PRICE & DISCOUNT

**NEVER** negotiate on price, its highly likely they are comparing products and services that are not like for like or to the quality you are offering.

**ALWAYS** add value, by doing so it's possible to get the customer to pay more.

You may decide to offer your services for less for somebody who can't afford to pay or a charity for example, this isn't discounting, its more ethical pricing and can be done at your discretion.



# DELIVERY

## PRE EVENT

Having received the signed Confirmation of Booking document back from the client (which includes confirmation of the programme, fees, dates, venue and accommodation, at least 4 weeks before the event, send joining instructions to each of the planned participants.

Invoice the client using our Mindspace template for the total cost, (plus VAT if applicable). With open courses attendees must pay prior to the course start date.

If required ensure printed training materials are prepared in plenty of time.

## TRAINING VENUES

It is traditionally the client's responsibility to arrange a training venue, unless it is an open course for individuals. Most clients will have meeting/training facilities at their offices or places of work, or they will arrange a nearby hotel or training facility to use.

If you're asked to source a venue, it is well worth forming strong relationships with local providers, who may offer a preferential rate for repeat business. The client should always pay for the facility, so if it is organised via your account, don't forget to include the cost in your invoice. Additionally, factor in for refreshments at agreed intervals throughout the day, to maintain professionalism and client comfort.

## TRAINING DAY

A typical agenda could be as follows:

- 09:00 - Welcome, Introductions & Administration
- 09:15 - Programme Content
- 10:45 - Break
- 11:00 - Programme Content
- 12:30 - Lunch
- 13:30 - Programme Content
- 15:00 - Break
- 15:15 - Programme Content
- 16:15 - Review & Action Planning
- 16:30 - Close



## POST EVENT

**Customer feedback is critical, and we strongly urge that you ask for this during and at the end of your time with clients. Evaluation forms give opportunity for you to review what and how you deliver for your client(s) and will certainly help secure repeat business.**

Collating this information in The Mind System will allow us to continue to stay in touch with all Mindspan customers.

Think where you can add 'added value' this will get remembered and will significantly contribute to giving an outstanding service to your client(s). Be sure to follow up, this could be to review post course work or just to check on progress. Again, this is a great way to acquire repeat business. When you have given a positive experience, ask for a testimonial and or a referral to other departments or other businesses.

## MINDSPAN OPERATING STANDARDS

As in any business maintaining the quality and standards of what you deliver is crucial to sustained success. In Mindspan you are very much the product, the relationships you form and standards you set if done well, will have you building life-long advocates of Mindspan.

**In our close delivery network, we are all dependent on each other and the success of the network depends on everyone adhering to the same high level of standards.**

As Licensor, we strongly value our reputation and will support our licensees to give outstanding service to all our customers. Where possible we will implement digital services that can support customer feedback and interaction.

**We will also periodically visit licensees to support delivery standards. This will always be carried out in a non-intrusive manner and in keeping with the Mindspan philosophy be a developmental exercise. We will always have two-way consultation and agreed actions after any visit.**

We will also from time to time contact customers directly with surveys and when responding to feedback.

If any time you have any doubts about operating standards and compliance, please contact head office for support.

Quality service has become something of a buzzword and is used so often that the perception of its importance and value to a business can get diluted. However, studies show that the level of service that a business provides can have more impact on performance than any other function of the business, including marketing.

And it is a quality service that we are selling. Think about it – our customers could source other performance training, coaching, facilitation and project management elsewhere, perhaps at cheaper prices, if they shopped around. So why would they want to stay with us? - Because we offer a better service and higher quality experience than our competitors.

**So, as long as you keep providing a great service, they will keep using you. And this is the true objective of any business - to get and keep customers. This is the concept of creating customers for life.**

Think of the value of a customer who comes back to you time after time, who recommends you to others and who in turn recommends you again. Over the life span of your business the value of that one customer to you could be tens of thousands of pounds.

**That is a lot of money – and why each customer should be treated as if they are worth tens of thousands to you. This is the real value of quality service to you and it is how your business can grow cost effectively in the long term.**

## CUSTOMER OBJECTIONS OR COMPLAINTS

**No business can operate without incurring complaints from time to time. No matter how good or customer focused you are, the fact that you are dealing with people means you will occasionally receive complaints.**

Having accepted this fact, it makes it easier to cope with and even embrace complaints as something that can benefit your business.

As much as you may not like to hear complaints, often there is a genuine reason for them and therefore, you are being shown a way to improve your business. If this is the case, take the information and make a change for the better.

**Another good reason to act on complaints is that you will never have a better customer than the one whose complaint you resolved beyond their expectation.**

Think of the impact this person will have as a promoter of your business rather than one who tells people how bad you are.

The general approach to dealing with complaints is straightforward. You should show empathy with your customer and make them genuinely feel you are on their side. Listen to what they have to say and make sure you understand the exact nature of the objection.

**Ours is a relatively simple business and it is highly likely that you can deal with the complaint on the spot. You should endeavour to do this and a bit more if possible. Remember, a little bit of goodwill goes a long way.**

If you are unable to immediately resolve the problem or feel that your customer is being unreasonable, please seek our advice and support. We may be able to assist with an acceptable solution for all parties.

You should immediately contact head office for advice in the event of any injury to course participants or threats by customers to take a grievance or unresolved complaint to the media, so that we can support you appropriately.



# FINANCE

## PAYMENT OF ANNUAL FEES

Mindspan will invoice you upon the anniversary of our license agreement for an annual licence fee.

This fee can be paid on the 1st of each month in 12 month instalments via a standing order or can be paid in full at the beginning of the year. Payment in full for the year maybe offered at a 10% discount.

## INVOICING CLIENTS

We have an invoice template for you to use. You should invoice clients directly and receive monies into your own nominated bank account. We will in time develop this function in 'The Mind System' to automate this process for you.

## BOOKKEEPING

For good practise you should have a bookkeeping system in place to record the following:

- Record all cash transactions and keep receipts.
- Record all purchases and keep receipts.
- Record all bank transactions and reconcile against bank statements at regular intervals. We strongly recommend that you subscribe to your bank's internet service.
- Keep copies of all sales invoices.
- Record all expenses
- Maintain a careful record of all mileage undertaken whilst on business.

You may of course to decide to outsource this function, but you will still need to provide the raw data with which they will need to perform their role for you.

## ACCOUNTS

You will also be required to produce accounting records for your annual return prepared by your accountant. You may also be required to produce:

- VAT records and returns
- Tax records for the inland revenue
- Records complying with the duties of company directors and company secretary

## REPORTING TO HEAD OFFICE

When complete, copies of your year-end accounts and VAT returns (if applicable) will be forwarded to us. This will enable us to monitor your business, help us to identify problems and trends and work with you to develop the business in the direction you would like to.

A member of the Mindspan team will be available to support you and undertake audits as and when required.



# TRAINING & SUPPORT

## OUR ROLE

We are committed to helping our network achieve their business goals. We also want being part of our network to be an enjoyable and rewarding experience for you.

The quality of the people involved in the Mindspan network and their development through training and education are major factors in determining our long-term success.

Therefore, we expect all our licensees to commit to continual training and development.

We will support you to develop Your Mindspan Plan and encourage you to regularly re-visit this plan to update your progress.

We will provide training for all our Mindspan products and services, this will be accessed at the start of every new licence agreement and will require additional work to be completed post attendance.

We will also provide an annual training event for our network, as well as webinar support and tutorials.

## DEVELOPING YOUR OWN TRAINING PLAN

In addition to the training provided by us, you should also consider developing your own training plan. This may include:

- Accredited qualifications
- Refresher courses in existing qualifications
- New courses in different specialisms
- Reading or audio books
- Webinars and tutorials
- Watching video content
- Shadowing other people in the network
- Finding a mentor or business coach



## SUPPORT & COMMUNICATION

For the Mindspan network to function effectively it is important that we have frequent, open and honest communication between us. We are dependent on each other and have mutual business goals that can be best achieved if we remain in regular, close contact.

We will communicate regularly via our news feed and through our social channels. We will also email and hold webinars with members of the network at regular intervals.

We would hope that you embrace this philosophy and for our part, Mindspan Head Office will be available during normal office hours, so if required please do get in touch to arrange a meeting.



### MINDSPAN HEAD OFFICE CONTACTS

**Gavin Drake – CEO**  
gavin@mind-span.co.uk

**Steve Eastaugh – Operations Director**  
steve@mind-span.co.uk

**Emily Drake – Marketing Director**  
emily@mind-span.co.uk



## MINDSPAN POLICIES

### HEALTH & SAFETY

**When coaching and training you have a duty of care to your clients to make sure their safety is always considered a priority.**

**Make sure that training rooms and facilities are fit for purpose and that the room is deemed safe to operate from.**

If you are asking clients to move around the room for shared activities, ensure trip hazards such as bags and laptop cables are considered and moved if likely to become a risk.

**We ask all licensees to work proactively with duty managers at training venues and to ask the following questions:**

- Has a risk assessment been carried out and what should you be aware of as a trainer?
- Are there any fire alarms planned?
- What are the evacuation procedures and where are the fire escapes?
- Where are the toilet facilities?
- When and when will break / lunch time be provided?
- Is there anything else you need to be made aware of?

**It is then your responsibility to relay all relevant information to your clients, giving them able opportunity to clarify anything they are unsure of or ask any further questions.**

**Whilst our business practises offer a low risk to our clients, it is still vital that any potential risks we do have, are thought about, mitigated and shared for everybody's comfort and safety.**



CONFIDENTIALITY

The Mindspan Licence Operations Manual defines, in detail, the methods, trade secrets and know-how (the system) to be used by Licensees in the operation of a Mindspan Licence.

The Licensee must undertake to keep the Manual and the system secret and confidential. It must be kept secure and there must be no unauthorised access to it.

The information contained in the Manual is secret and confidential and is the exclusive property of Mindspan Licensing Ltd. It is being made available to the Licensee to enable the Licensee to properly operate the system in the conduct of their business licensed by Mindspan Licensing Ltd to the Licensee and for no other purpose.

It is essential that the system is kept secret and confidential and limited in use so that no competitor can benefit from it.

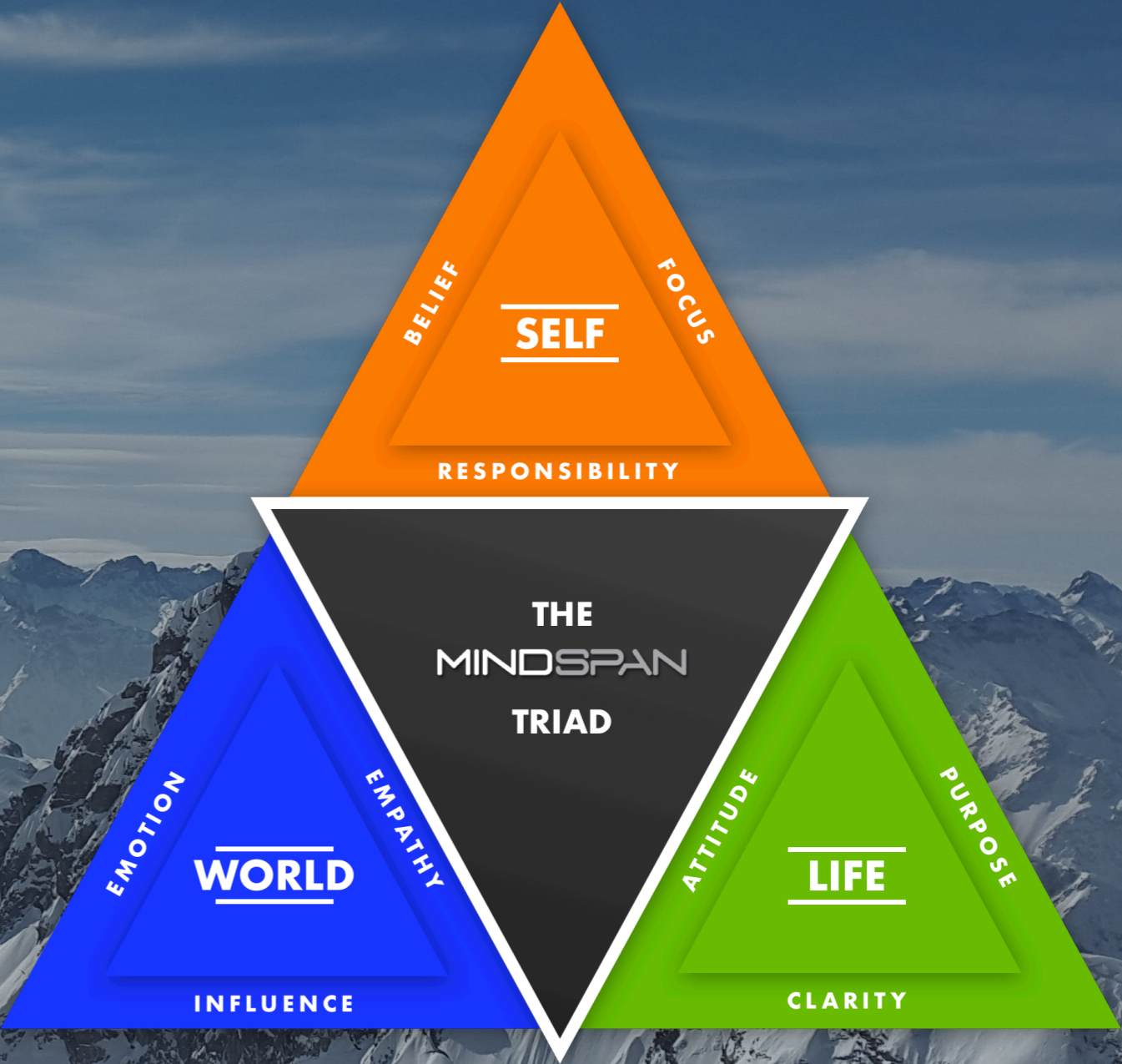
CORPORATE IDENTITY

The corporate identity and its use are vital elements in the brand building process. If we all present a strong and consistent corporate identity this strengthens the brand. If we do not, it dilutes the brand, reduces its impact and damages our network.

In addition, if we allow the corporate identity to be abused it may reduce our capability to legally protect it. Therefore, corporate identity is an element of the system, which will be strictly policed and implemented.

We have put systems in place to ensure that you cannot accidentally be in breach of the corporate identity requirements and therefore, you will be responsible for any breaches committed.

If at any time you require clarification on any point to do with the corporate identity, please contact Mindspan Head Office immediately and before you take any action on the matter.





[mindspan-global.com](http://mindspan-global.com)

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