

# WHAT TO DO RIGHT NOW

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1

## THE JILLIAN FUND SUPPORT

**Clover Imaging** – Harley Davidson Raffle  
Thursday, August 19 • 4:30PM

### CLOVER IMAGING REVS UP SUPPORT FOR THE JILLIAN FUND WITH A HARLEY-DAVIDSON RAFFLE

Clover Partners with Patriot Pack to  
Raise Funds for Parents of Children  
with Life-Threatening Illnesses

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# WHAT TO DO RIGHT NOW

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# BEFORE

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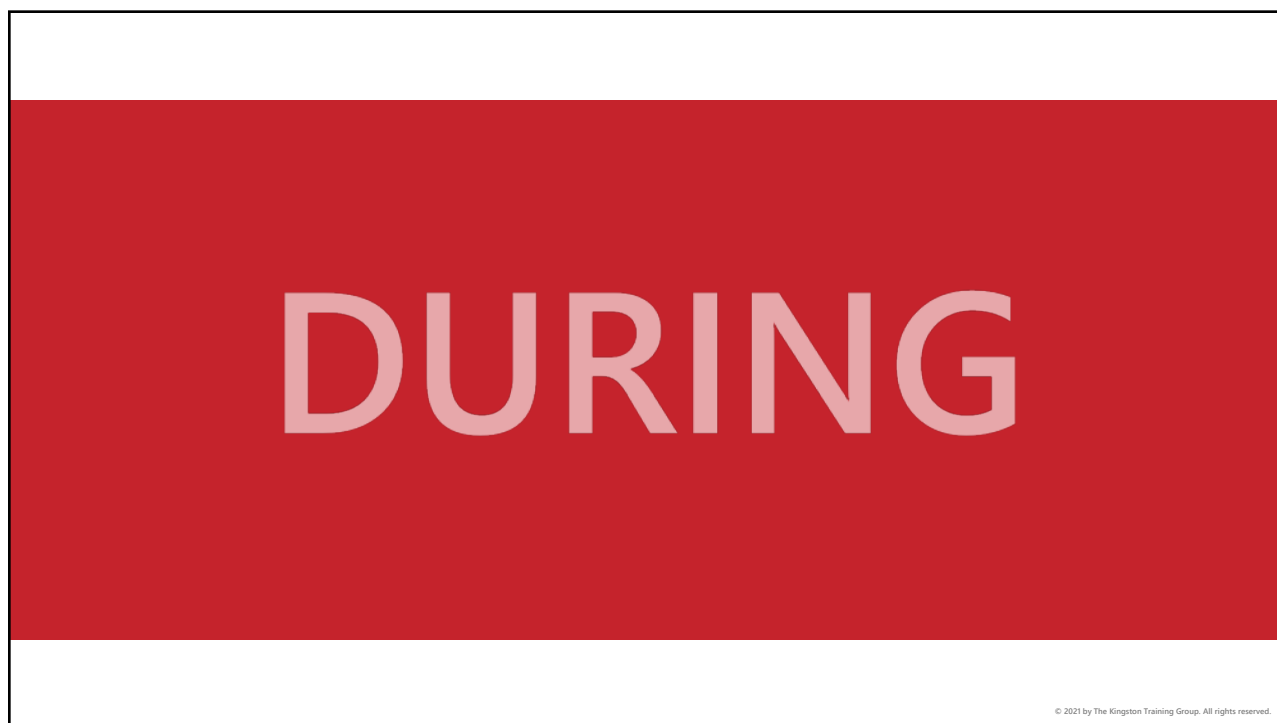
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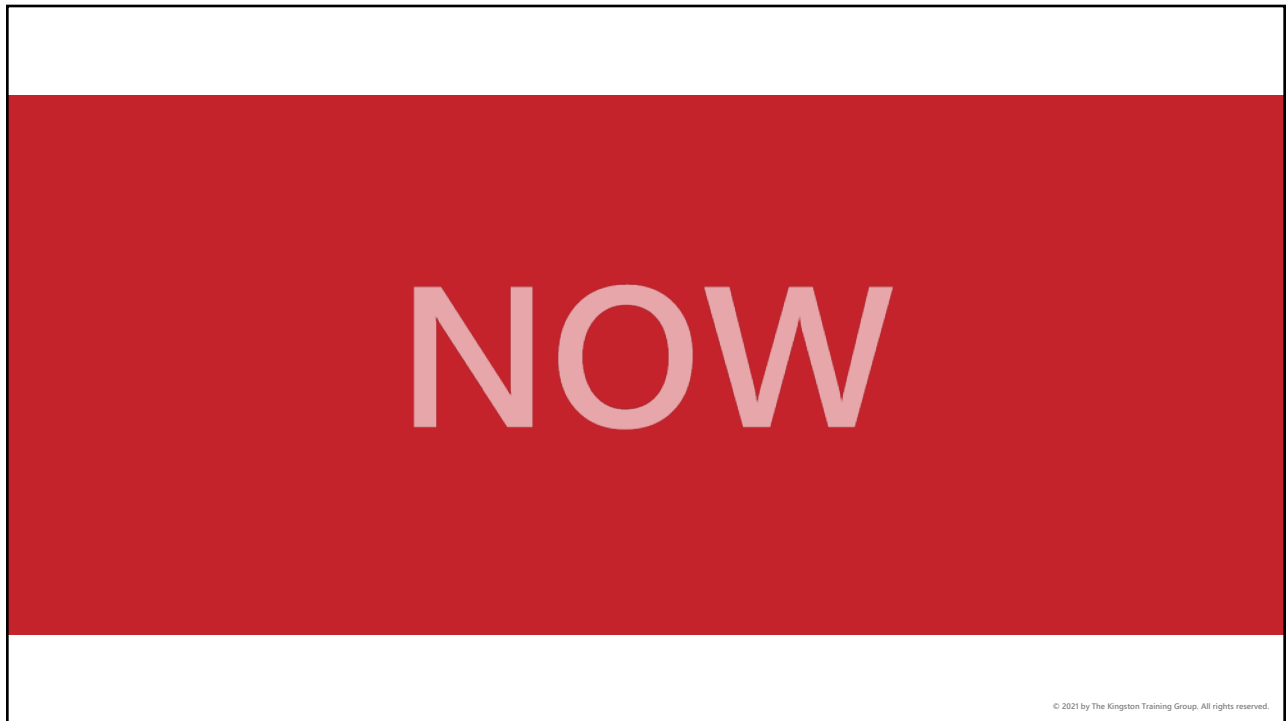
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## C-Level Decision Maker Meat Sheets

### Chief Information Officer (CIO) /Chief Technology Officer (CTO)

The Chief Information Officer is responsible for developing, executing, and managing information technology plans for the enterprise. This includes hardware, software, processes, procedures, and policies designed to meet all of the computing and technology needs smoothly and effectively of their enterprise.

**Blogs, articles, and Newsletters to sign up**

- <https://www.cio.com/newsletters/signup.html>
- <https://www.cioinsight.com/>
- <https://go.forrester.com/blogs/>

**Bullets that can be used in your communications to add executive level content:**

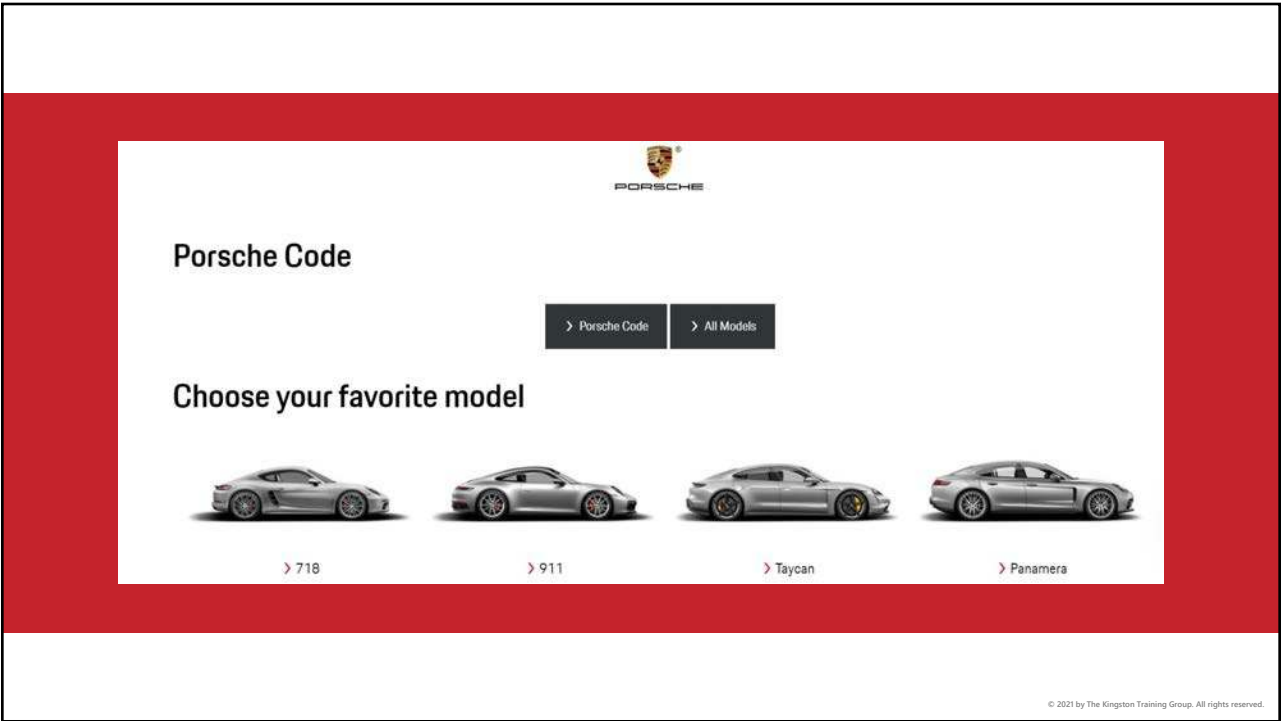
- continue to maintain and improve your organization's internal technology processes to maximize company productivity and make complex tasks easily achievable through the implementation of automated system solutions
- developing and managing the IT budget within corporate guidelines while effectively achieving the IT goals for the enterprise
- remain updated on changes in industry trends and new IT technologies
- optimizing ROI for IT
- effectively deploying system security innovation to optimization of labor; cost savings; time savings and increase ROI
- implementing budgeting practices that deliver maximum benefits
- leveraging knowledge management and protecting the firm's intellectual assets
- combining business technology strategies with the global management of their information technology plans for their enterprise
- insuring the reliability and security of data and systems in use
- reducing technology costs and improve performance
- identifying potential areas that could be susceptible to cybersecurity breaches and utilizing



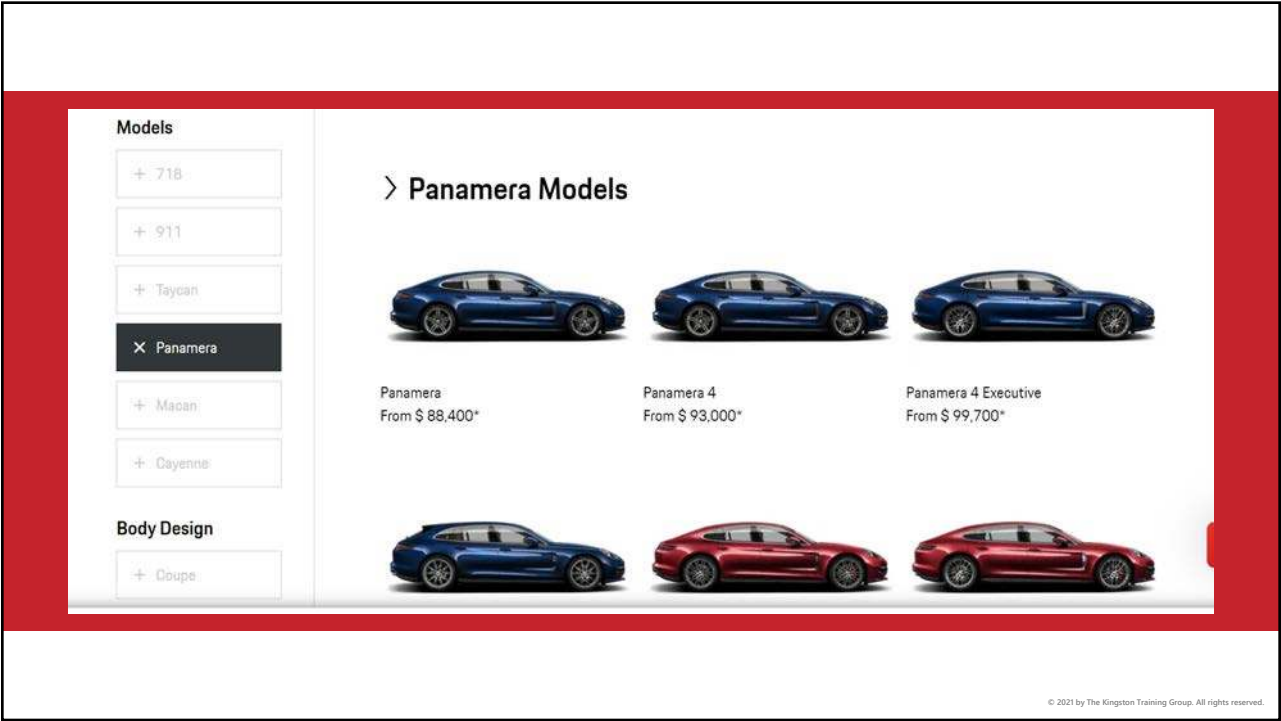
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# WHAT

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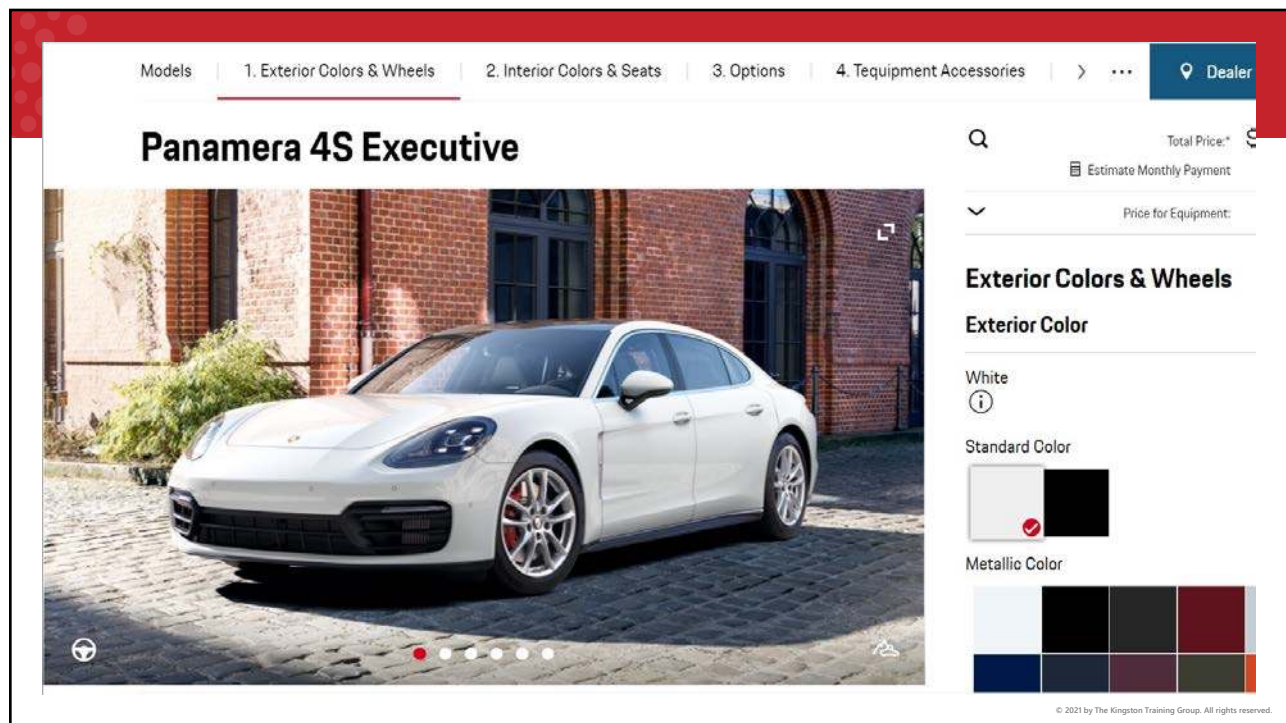


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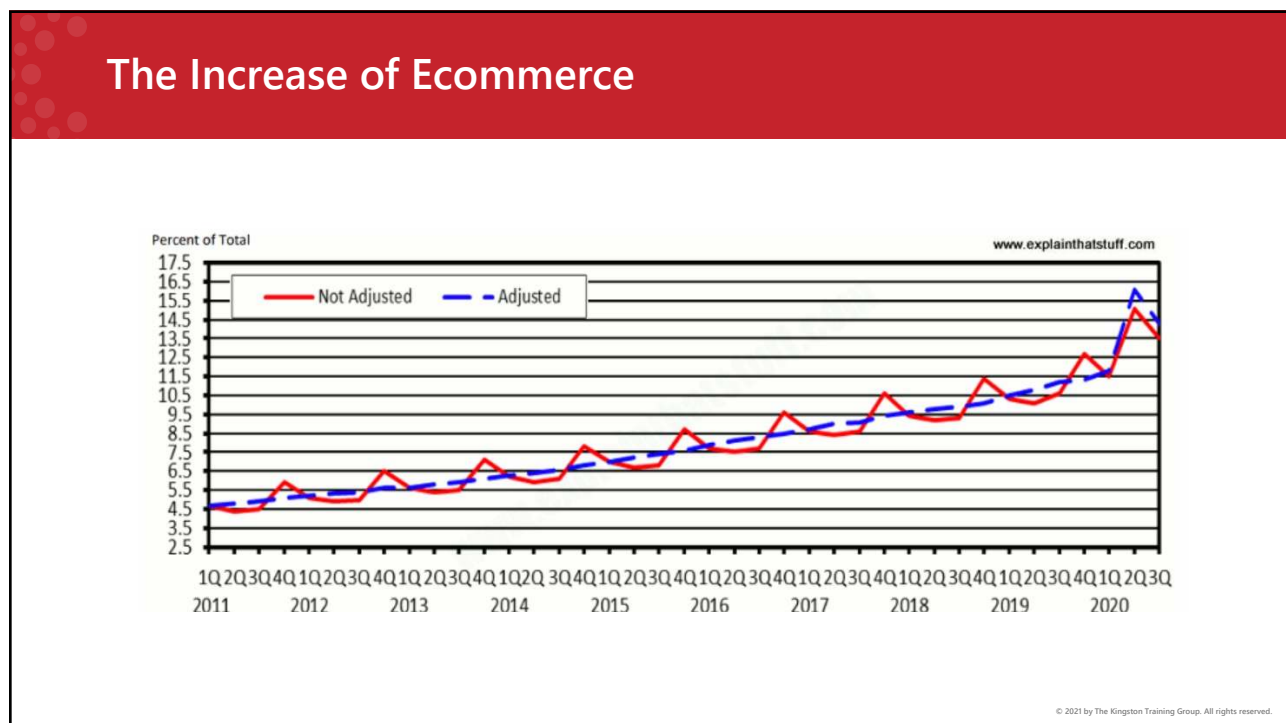


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Stramaglio  
CONSULTING

TAKING THE IMAGING CHANNEL  
TO THE NEXT LEVEL.

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**"CHIP SHORTAGE  
TO GET WORSE  
BEFORE IT  
GETS BETTER."**

**— INTEL CEO**

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**DocuWare**

**Step 1: Preparing to go after Current Customers for a DocuWare Meeting:**

1. Research your current point person at the company and identify their executive title. Go to LinkedIn or Google "leadership for [insert their company name]" or google "CFO at [insert their company name]" and find three additional buying committee executives that you would like at the meeting.
2. After you know who you want to go after, craft your communications both by phone and email.

**Step 2: Current Client Phone Script:**

Hi [insert their name], it's [insert your name], I am currently [insert name of their company] technology partner from Advanced. Part of your relationship with Advanced is a continued review to ensure that your data and documents are secure and easily accessible more cost effectively here in 2021.

I was asked to reach out to my premiere clients first, in order to schedule a collaborative conversation (which we can certainly do over zoom) to discuss your document security risks and how to mitigate them.

It's what our other [insert verbal like law firm] clients are asking us to help them with and I wanted to extend the invitation to [insert name of their company]. Would [insert date and time] work for that collaborative conversation?

**If they say "yes", secure the time and then ask them if one of the point people that you looked up in step 1. will be joining as well. For example...**

**CFO:** [insert their name], I would like [insert name of finance executive] to join us. Other legal financial departments have had issues surrounding processes such as purchasing approvals, client billable tracking and data entry. Can you share with him the time for our scheduled conversation on [insert date and time] and I will email him as well.

**HR:** [insert their name], I would like [insert name of operations executive] to join us. Other HR departments have had issues surrounding processes such as centralizing, organizing and securing their employee records — and improving processes from recruiting to annual reviews to talent management. Can you share with him the time for our scheduled conversation on [insert date and time] and I will email him as well.

**Sales and Marketing:** [insert their name], I would like [insert name of head of sales executive] to join us. Other sales departments have had issues surrounding centralizing, organizing, and managing customer records, renewals and proposal versions. Can you share with him the time for our scheduled conversation on [insert date and time] and I will email him as well.

**IT:** [insert their name], I would like [insert name of IT executive] to join us. Other IT departments have had issues with slow VPNs and messy network drives. Can you share with him the time for our scheduled conversation on [insert date and time] and I will email him as well.

Kingston Training Group — Kate Kingston — [Kingston@kingstontraining.com](mailto:Kingston@kingstontraining.com) — 844-831-1166

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# IT SERVICES

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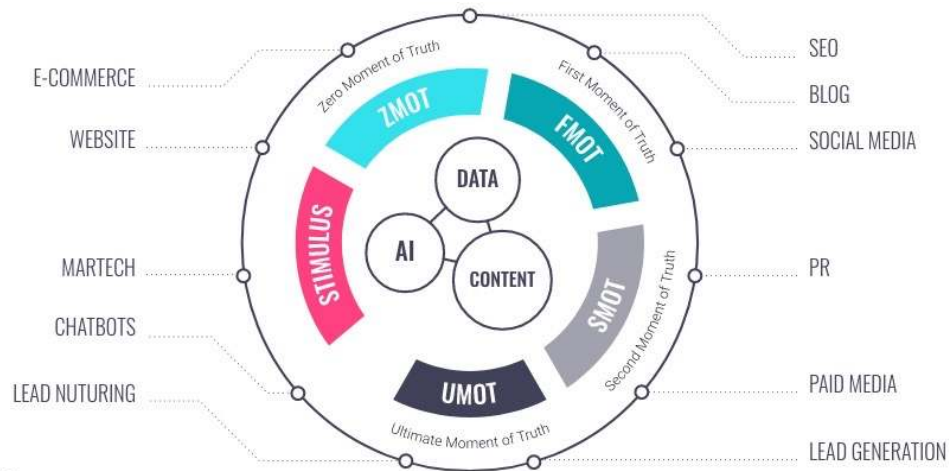
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## Digital Ecosystem



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# HOW

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# LinkedIn

## POSTING FOR PROSPECTING

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The image shows a LinkedIn post by Kate Kingston, who is associated with 'Make More Net New C-Level Business Technology Meetings - Make More M...'. The post is dated '1d' and includes a link icon. The text of the post reads: 'For those of you that are attending the BTA conference this month, come by my Educational Session on "Prospecting Past the Pandemic" on Thursday, August 19th at 8:10am PDT. Don't forget to drop your business card in the bucket f ...see more'. Below the text is a large graphic for a contest. The graphic features a close-up of a Harley-Davidson motorcycle headlight and handlebars on the left. On the right, the text reads: 'ENTER FOR YOUR CHANCE TO WIN A NEW 2021 HARLEY SLIM BOY'. At the bottom of the graphic, it says 'From Clover & The Jillian Fund'. The background of the entire image is a blurred photo of an audience sitting in a conference room, looking towards a whiteboard.

Kate Kingston  
Make More Net New C-Level Business Technology Meetings - Make More M...  
1d •

For those of you that are attending the BTA conference this month, come by my Educational Session on "Prospecting Past the Pandemic" on Thursday, August 19th at 8:10am PDT. Don't forget to drop your business card in the bucket f ...see more

ENTER FOR YOUR CHANCE TO WIN A  
NEW 2021  
HARLEY  
SLIM BOY  
From Clover & The Jillian Fund

The Jillian Fund : News & Events : News

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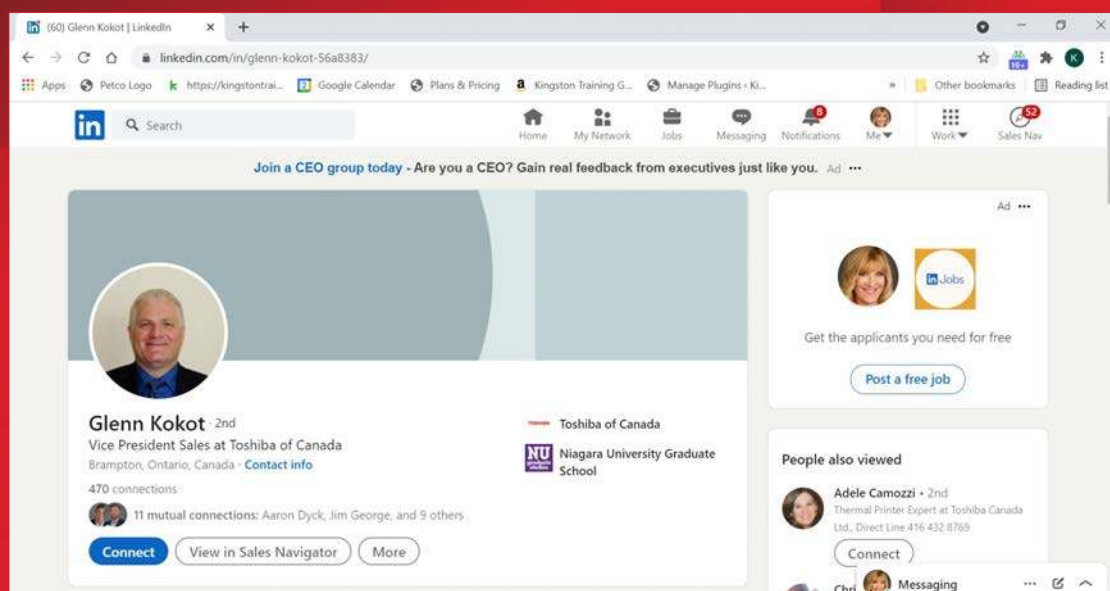
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Michael Stramaglio Andy Slawetsky Clover Imaging Group Frank Cucco Michael Reid Alex Richard (Rick) Bastinelli Michael Parmet Jim Potts, MBA Jon Joynt Timothy Houlihan Jennie Fisher Jeff Gau Marco Technologies Smile Business Products Brent Hoskins Chad Schwartz Christy. Gallegos Jim Dotter John Konynenbelt John Lowery Keith Lenore Barry Simon Kirk Studebaker Jerry Blaine Monte Sloan Lee Stein Stephanie Heap Boe Mellor Dave Landsberger Dan Watson Mark Spears Rick Taylor Terry Dixon Jerry Newberry Bob Madaio Steven Sauer



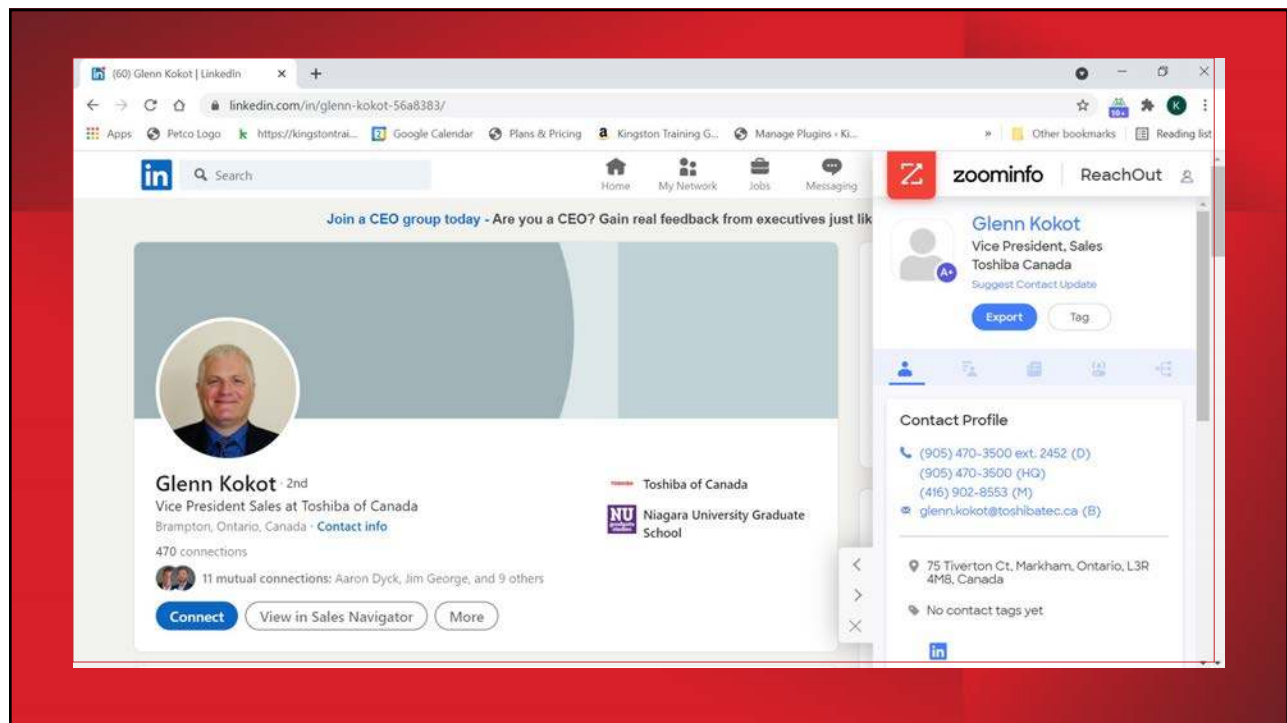
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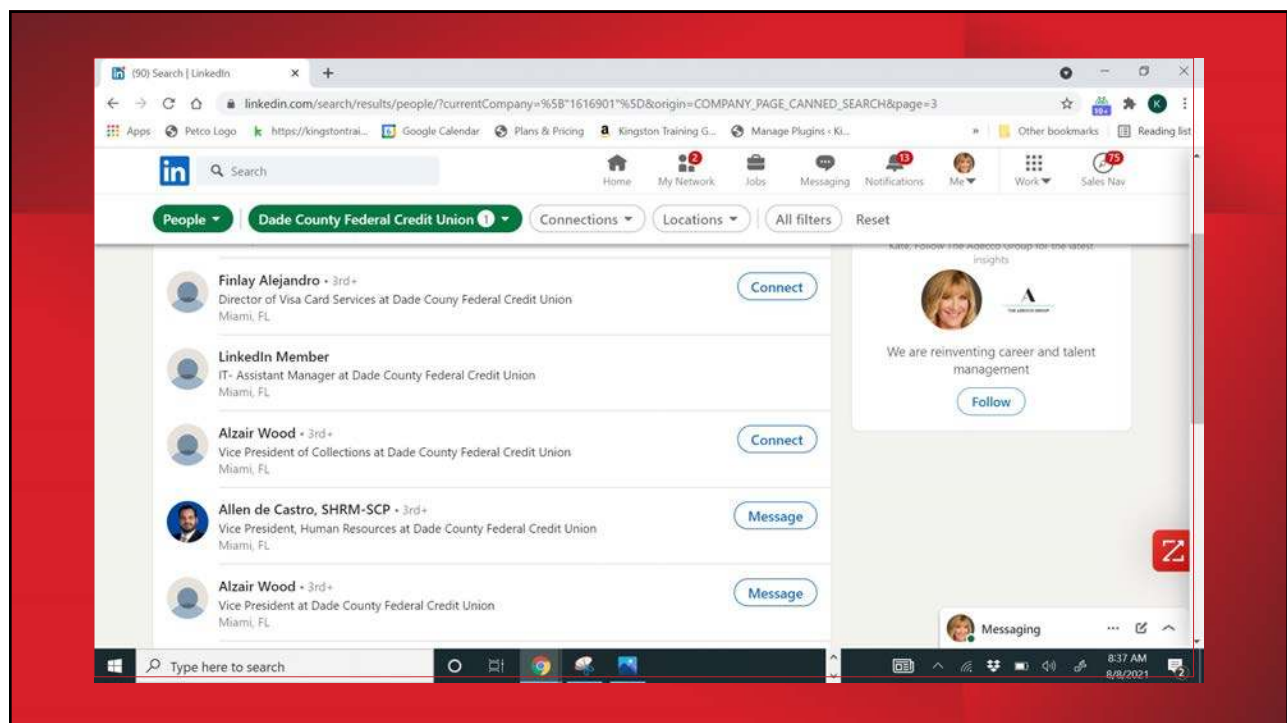


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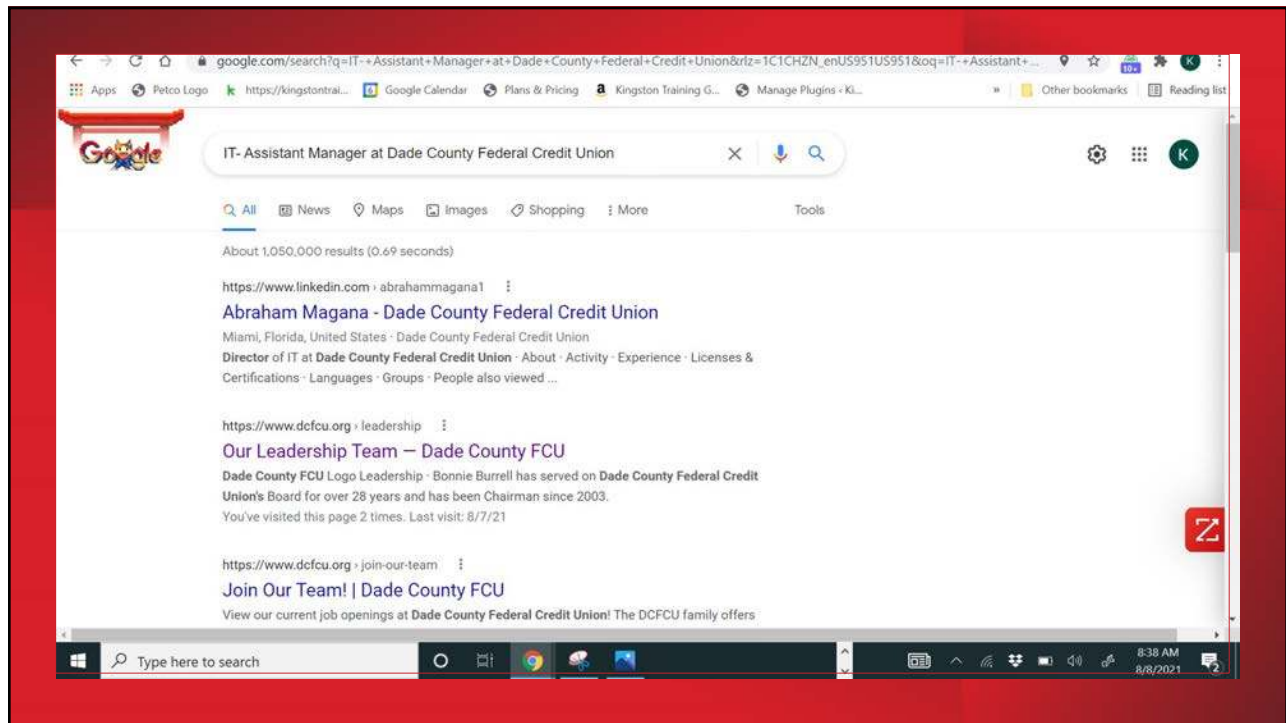


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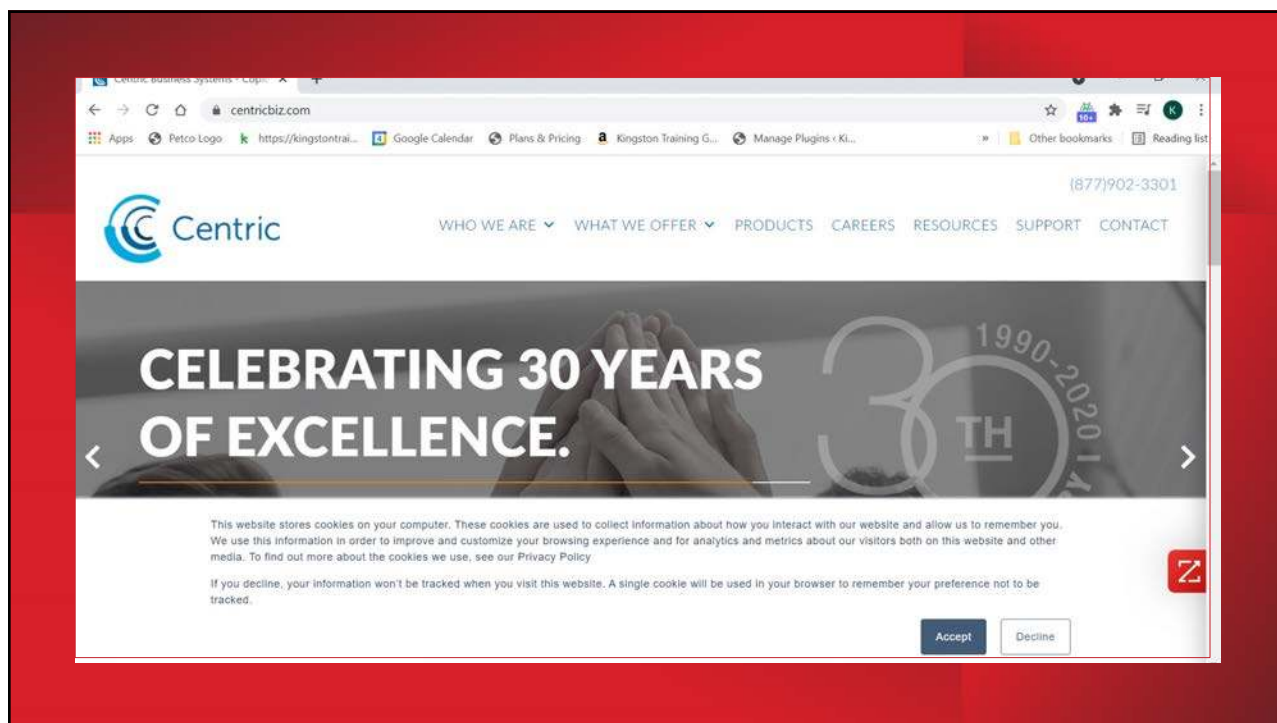
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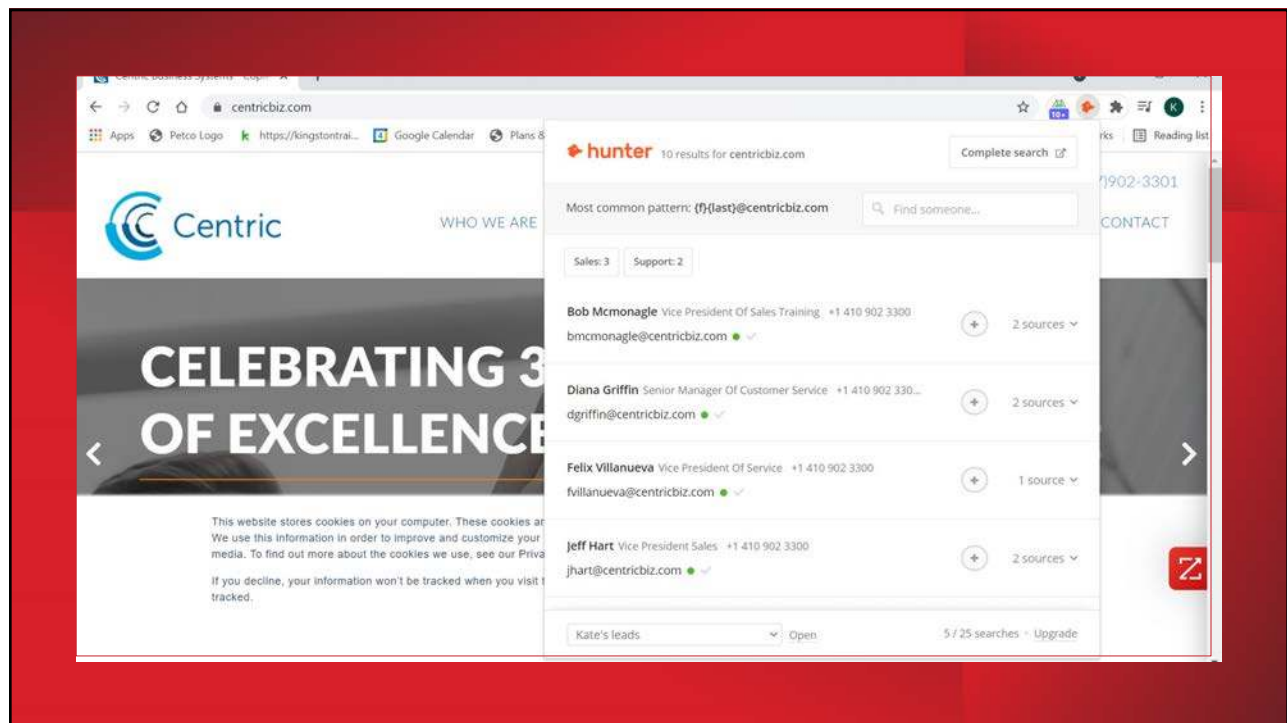
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# TikTok: For Business

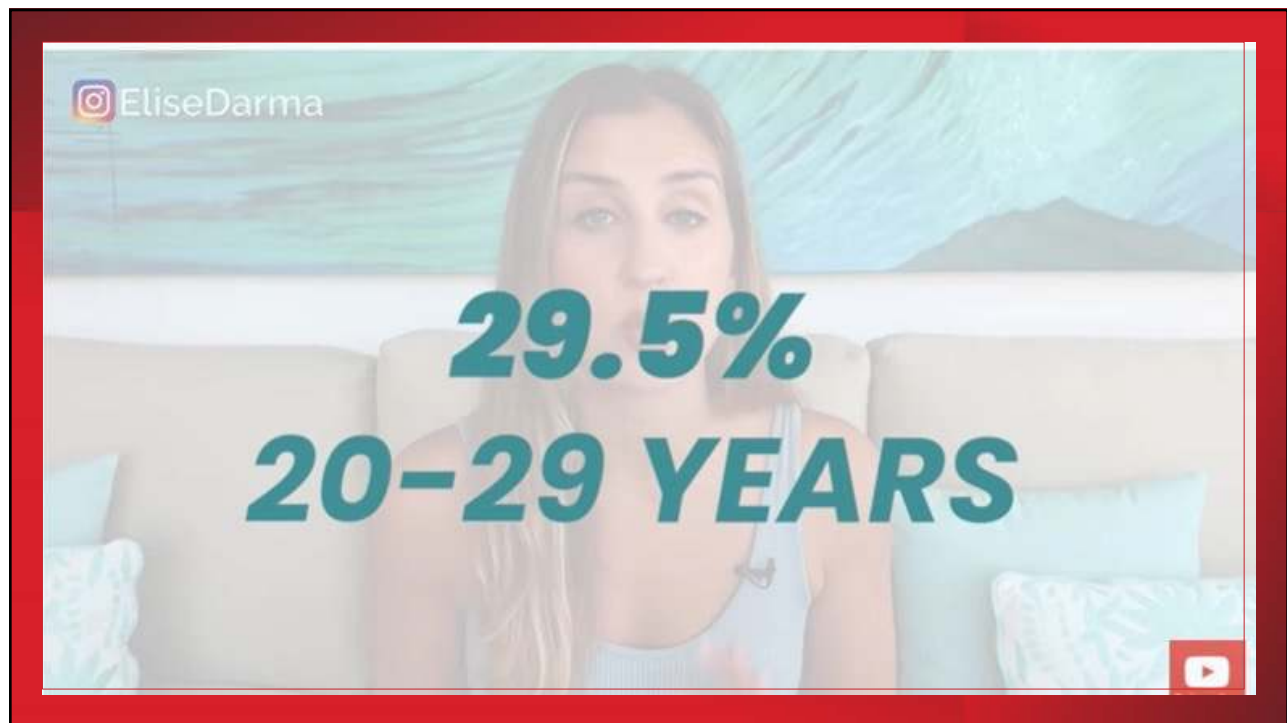
## GROW YOUR BUSINESS WITH TIKTOK NOW

Reach your target customers and drive results quickly with tiktok ads manager.

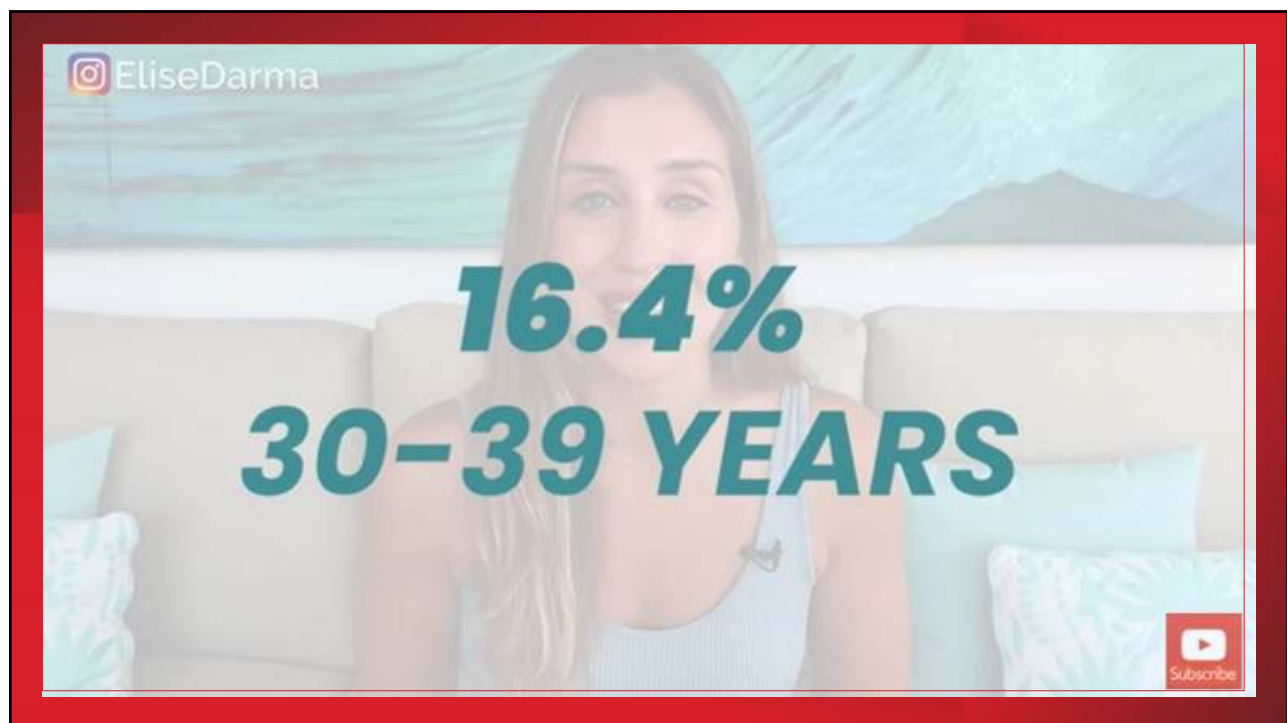
With our large audience base and easy-to-use tools, anyone can be a marketing expert.

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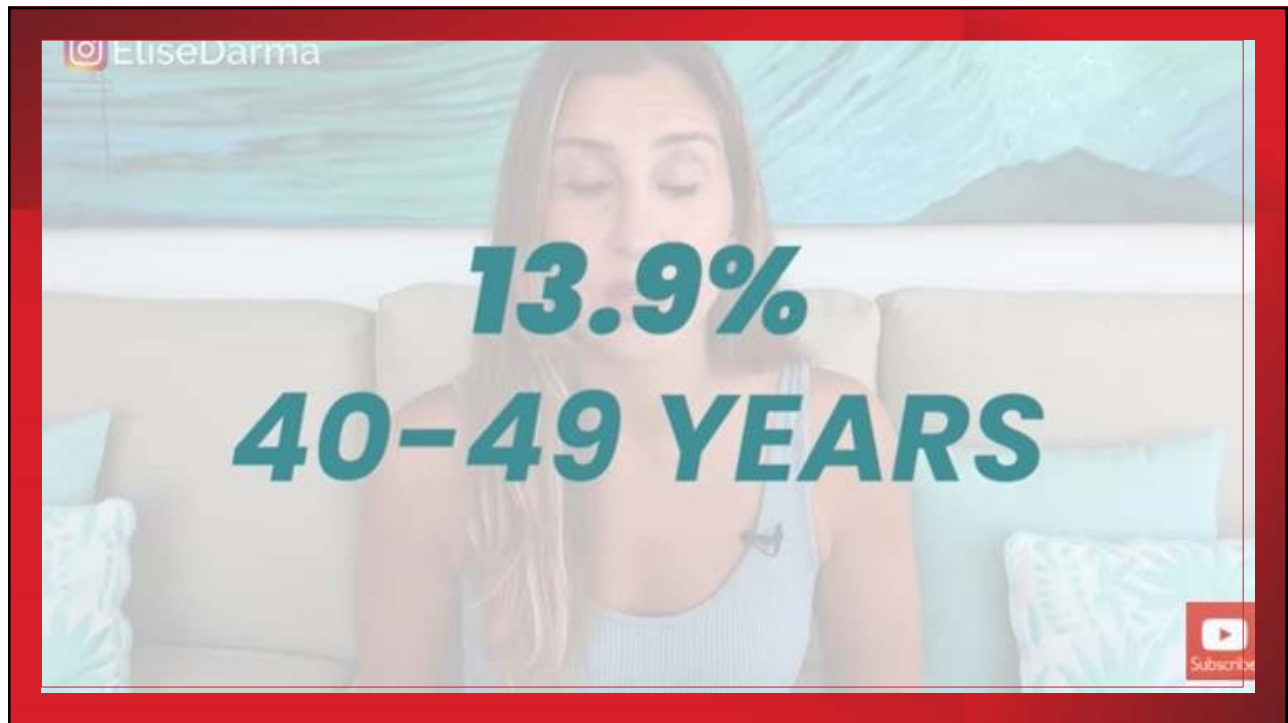


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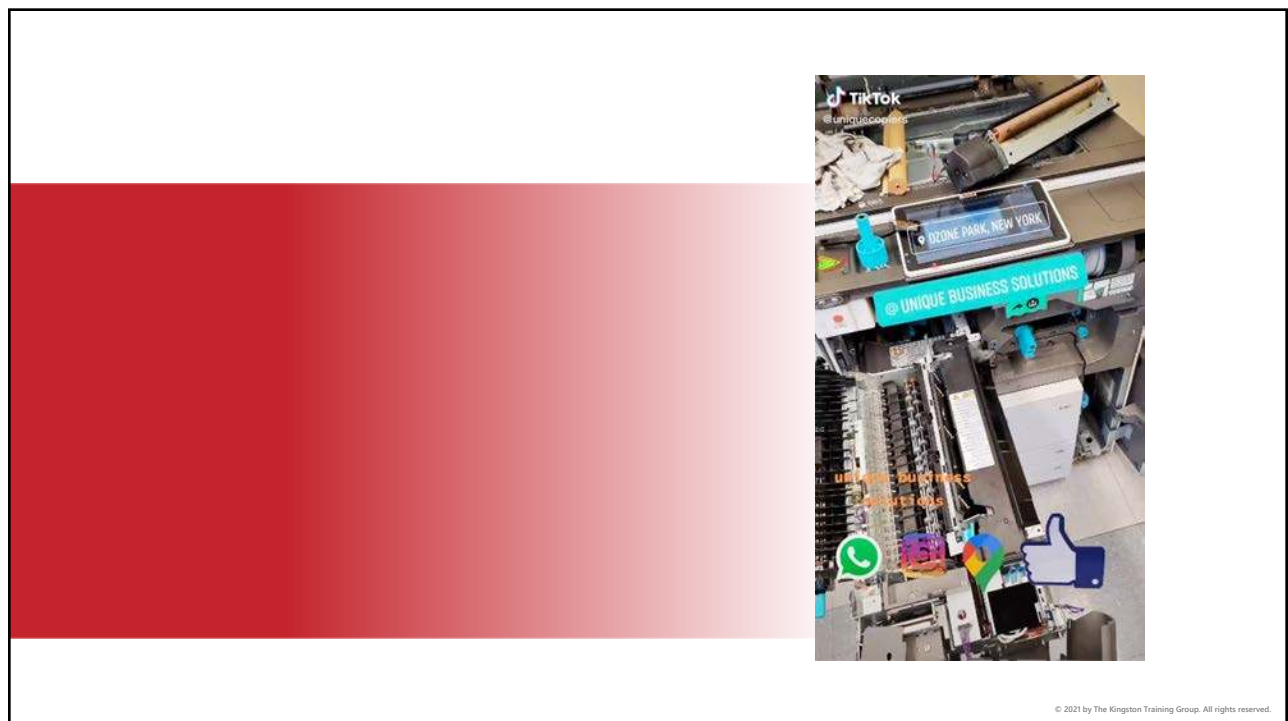


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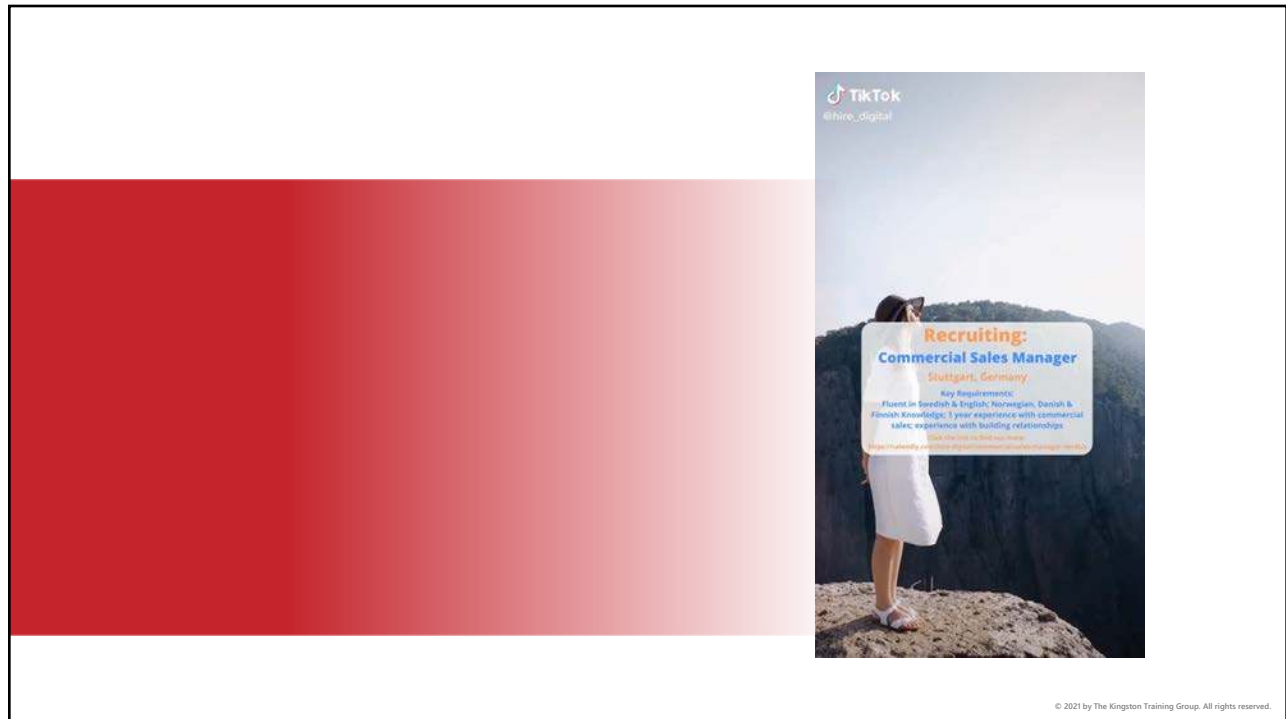


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## Promote VETech at BTA



**VETech**  
 Veterans Enhancing Technology

Providing veterans opportunities  
 to transition their military training  
 to gainful employment

**U.S. Veterans:**  
 Visit the VETech page to post your résumé and review open positions. *Please upload your DD214 when submitting your résumé.*

**Employers:**  
 Visit the VETech page to post an open position, review open positions or review posted résumés.

[\*\*www.bta.org/VETech\*\*](http://www.bta.org/VETech)

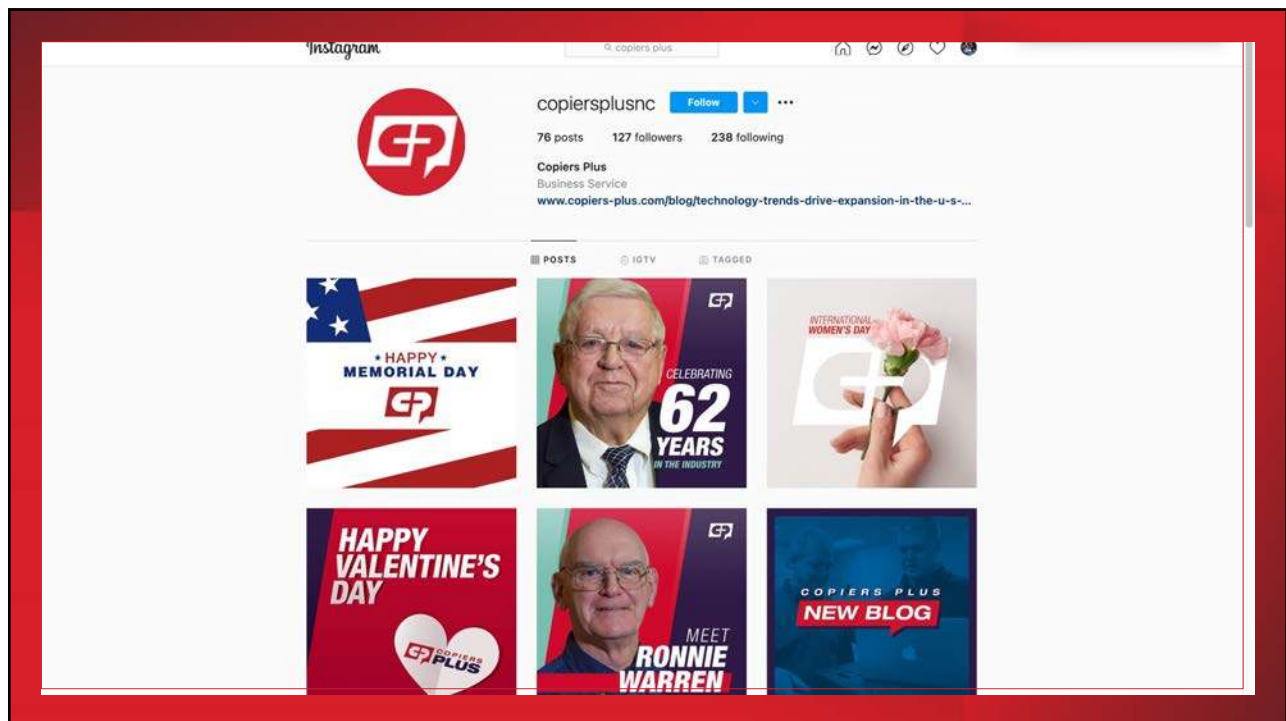
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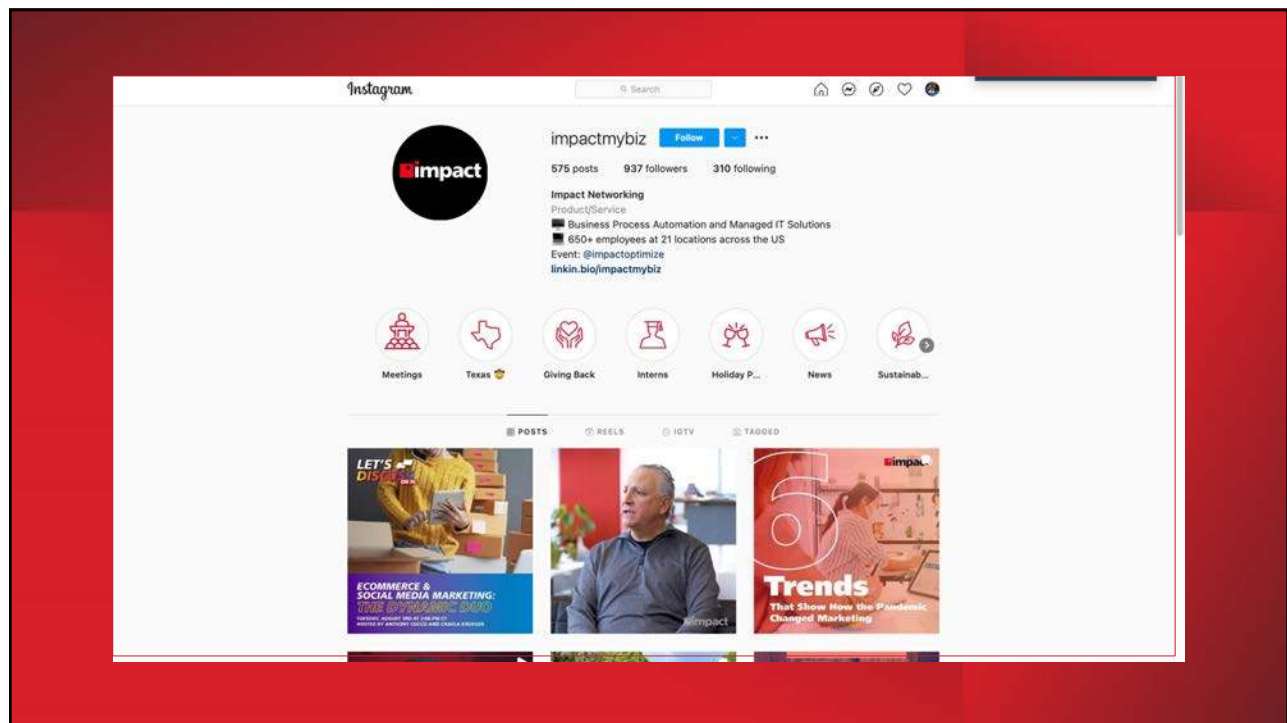


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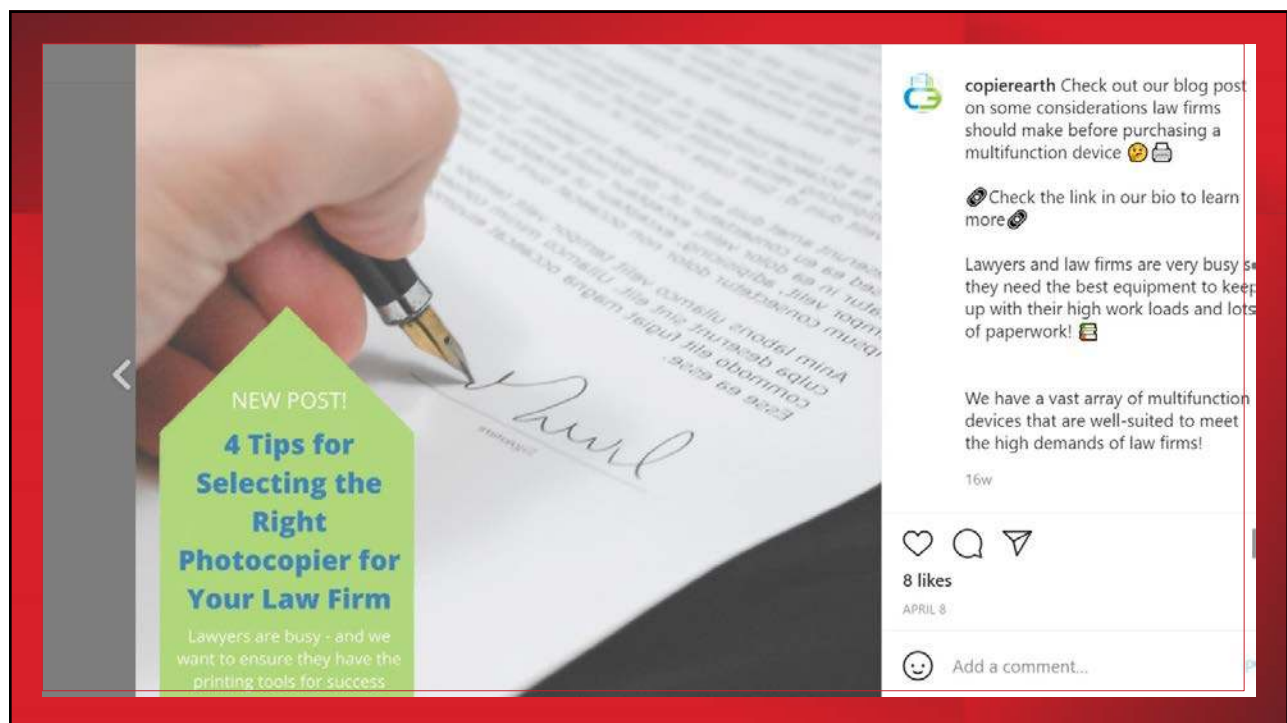
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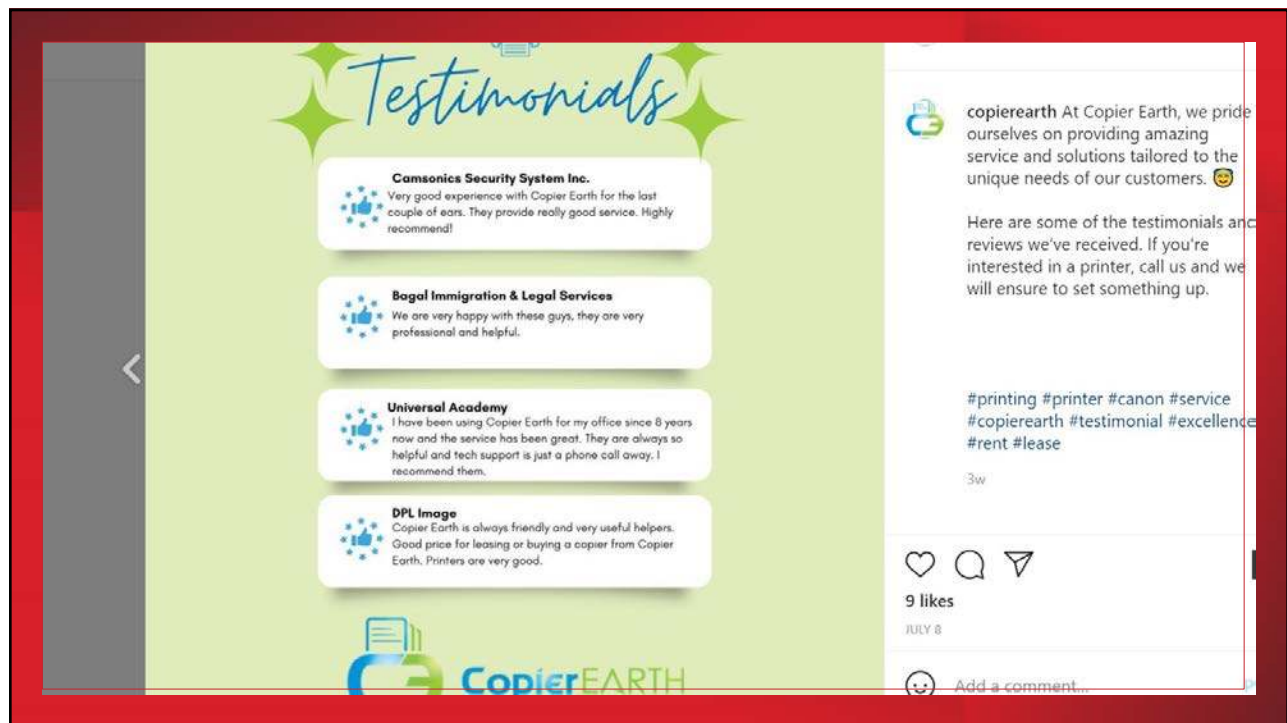
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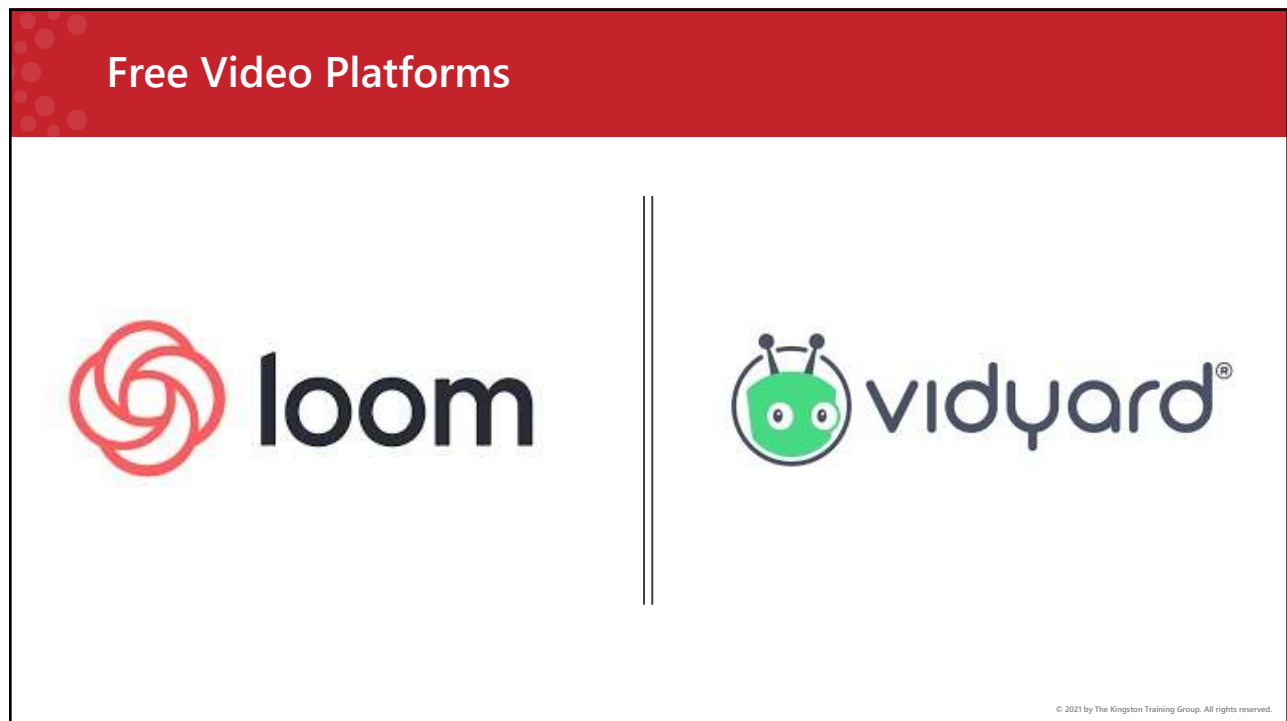
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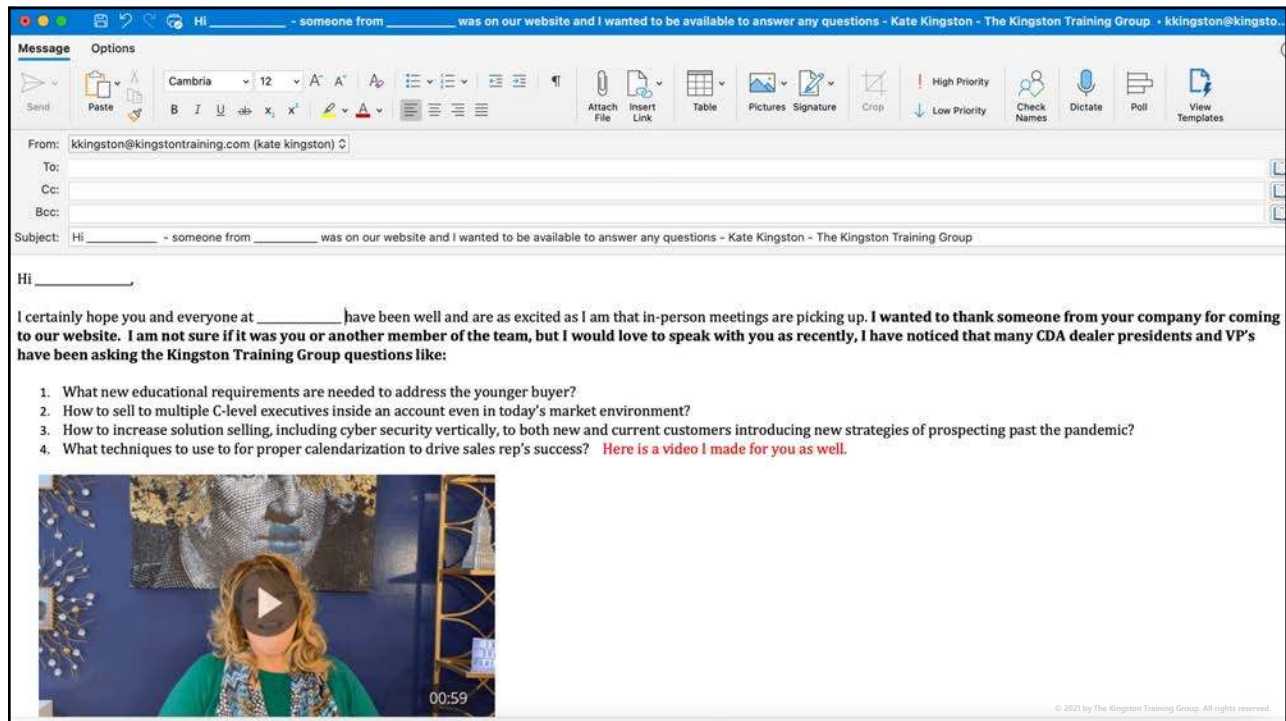
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## Promote VETech at BTA



Providing veterans opportunities  
to transition their military training  
to gainful employment

### U.S. Veterans:

Visit the VETech page to post  
your résumé and review open  
positions. *Please upload your  
DD214 when submitting your  
résumé.*

### Employers:

Visit the VETech page to post  
an open position, review open  
positions or review posted  
résumés.

[www.bta.org/VETech](http://www.bta.org/VETech)

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# WHAT GOOD LOOKS LIKE

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LinkedIn

Leadership  
for

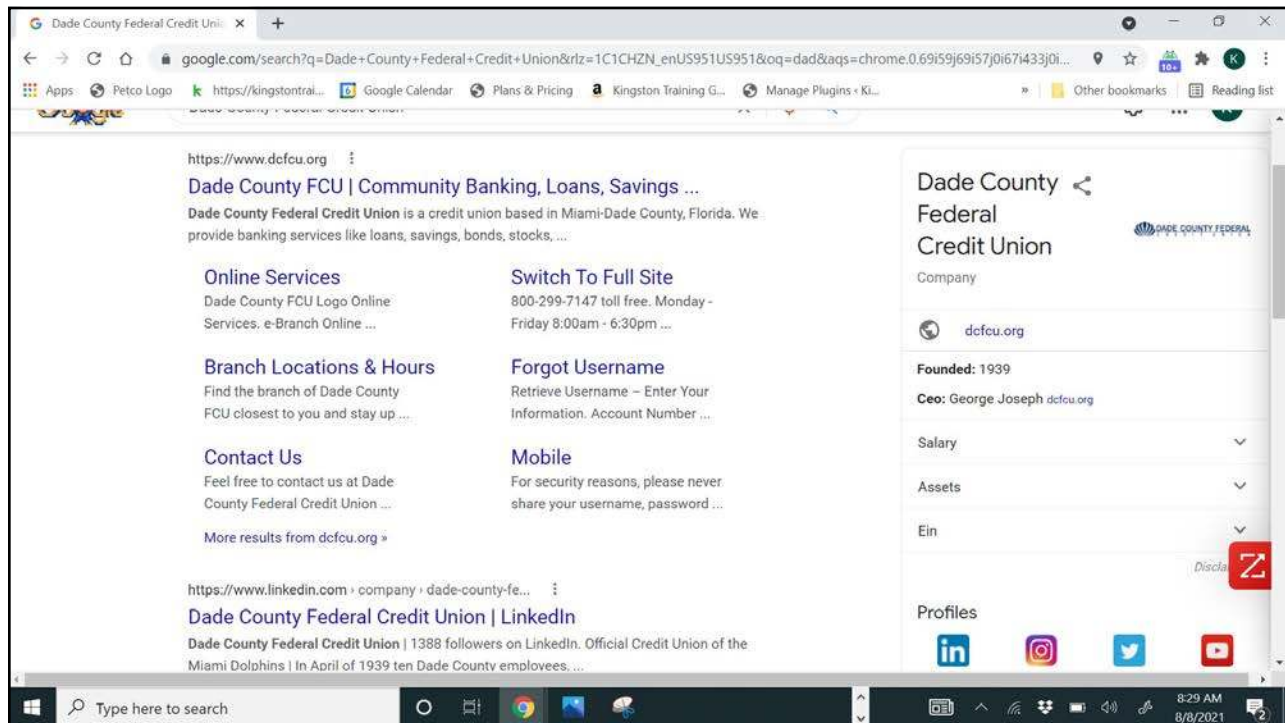
2021 news  
or articles  
about

Annual  
Report

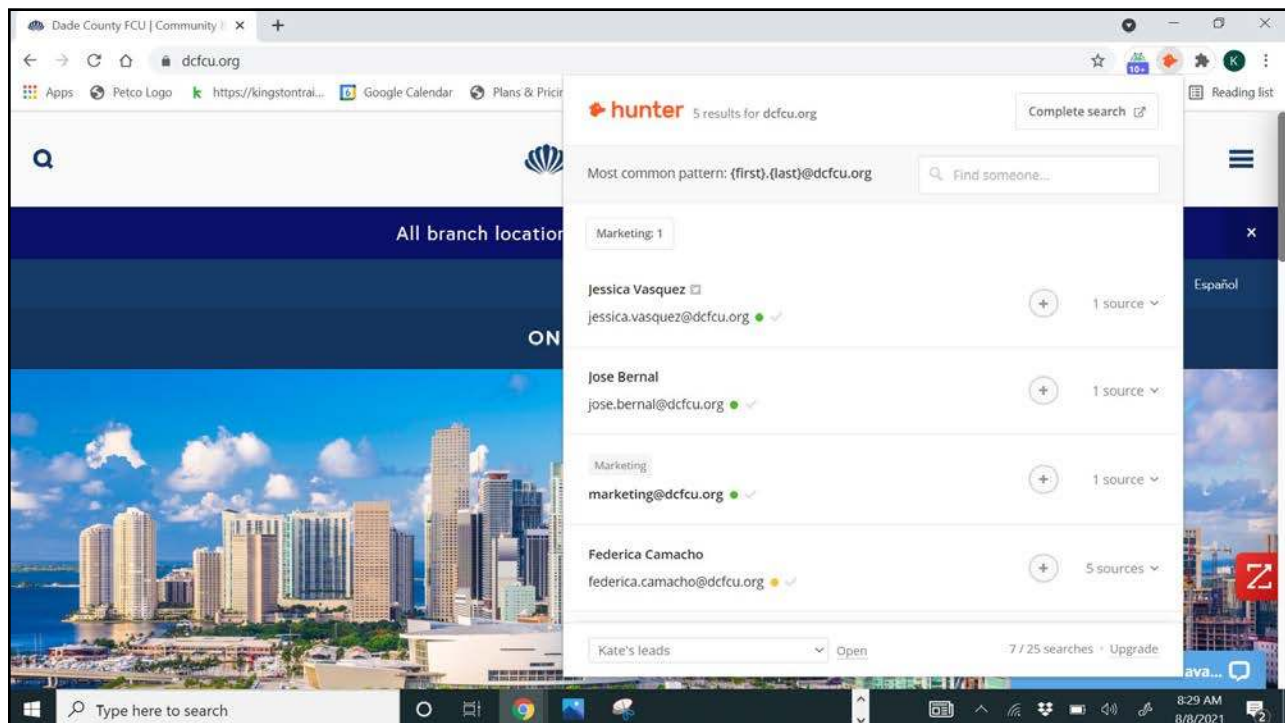
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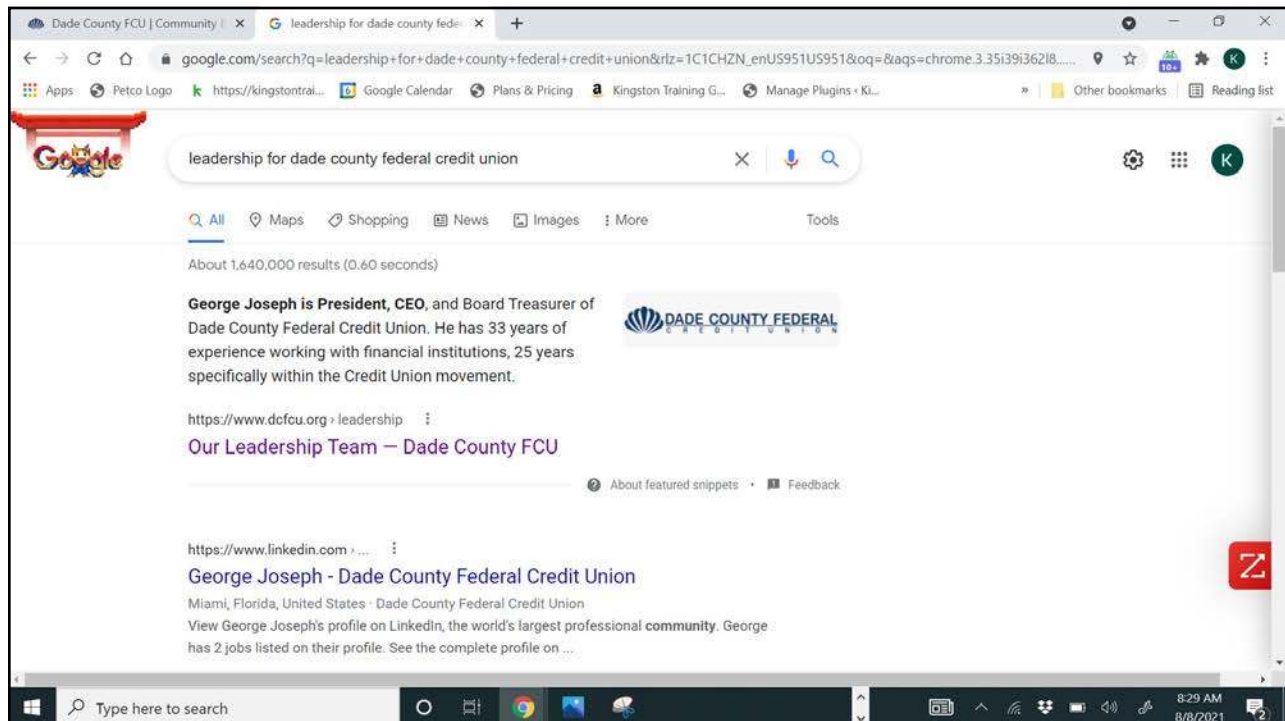




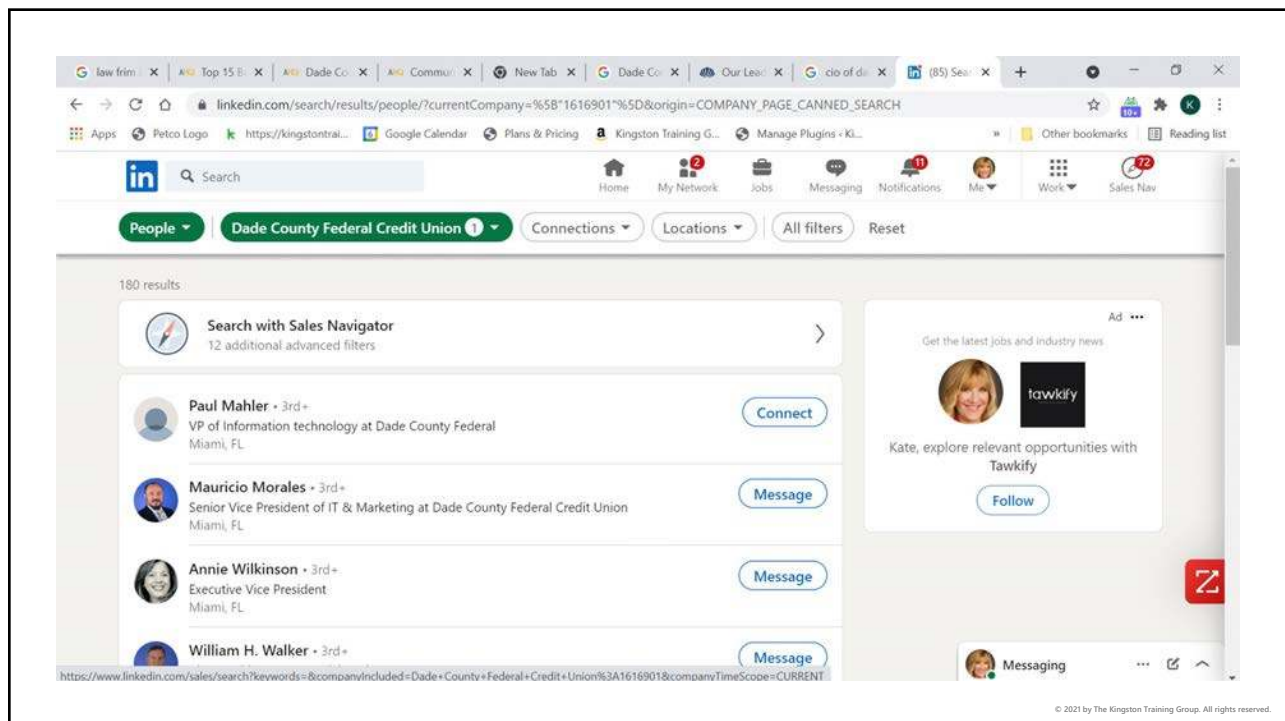
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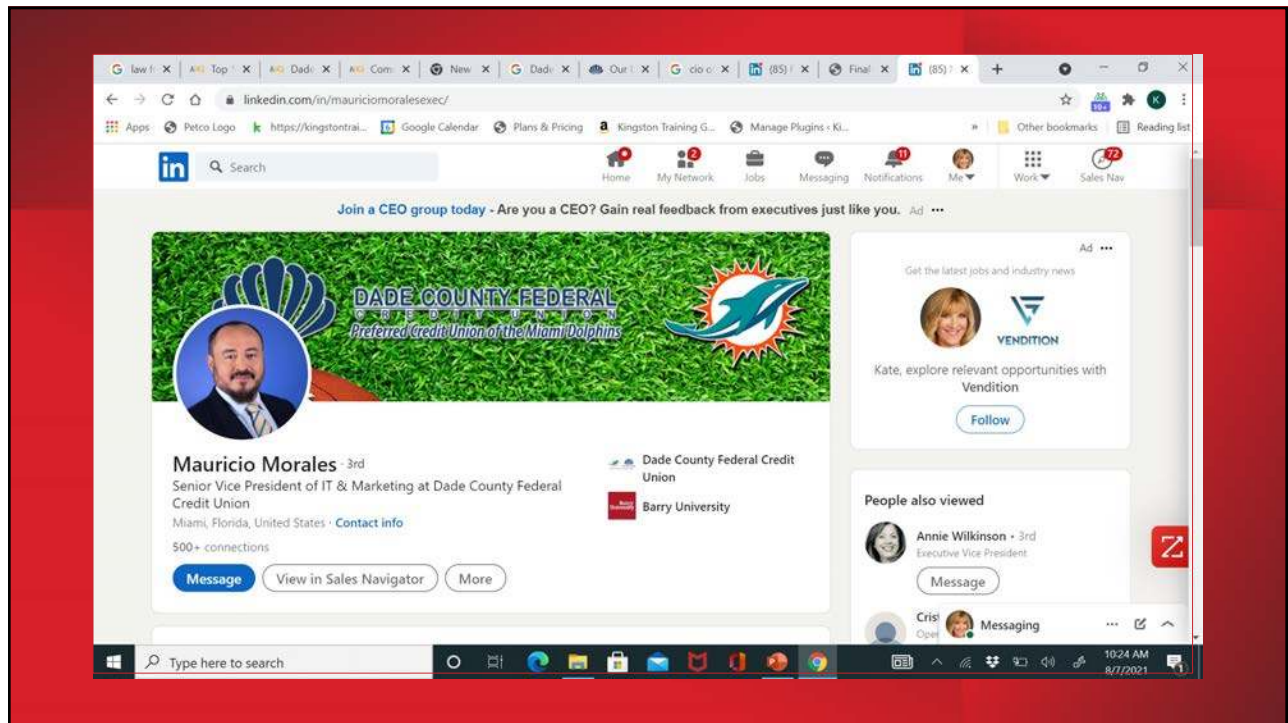
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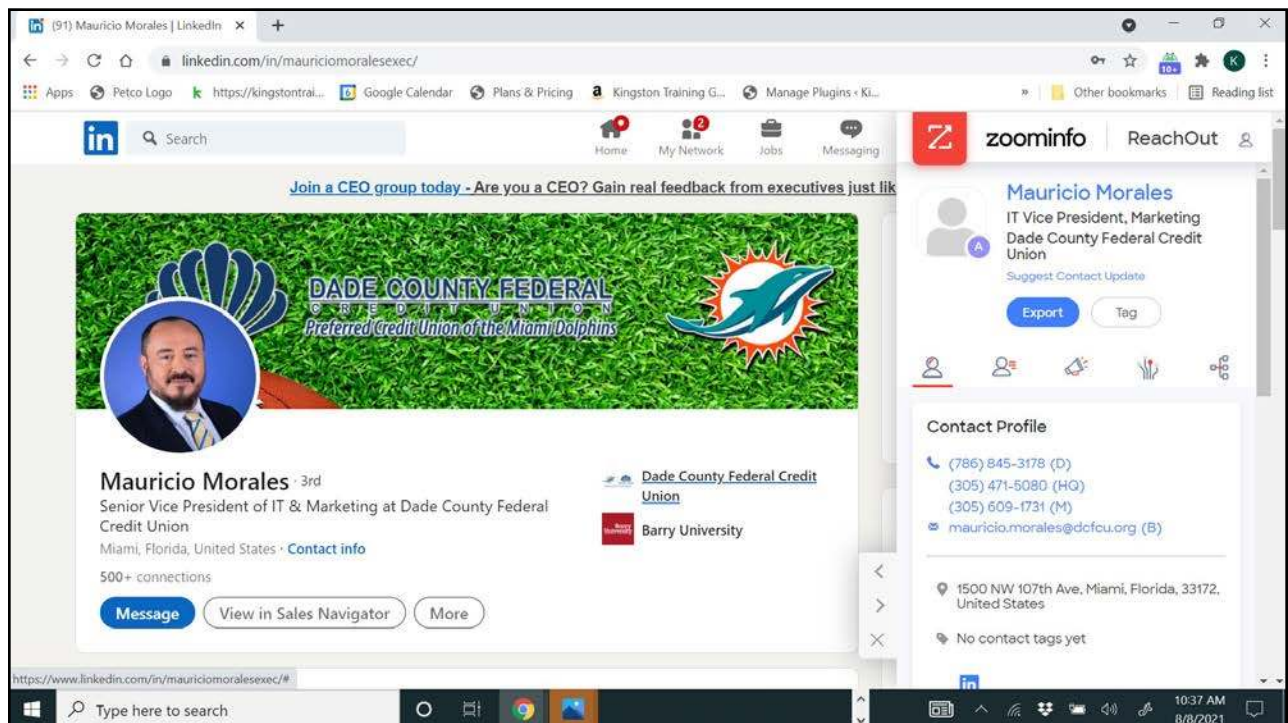
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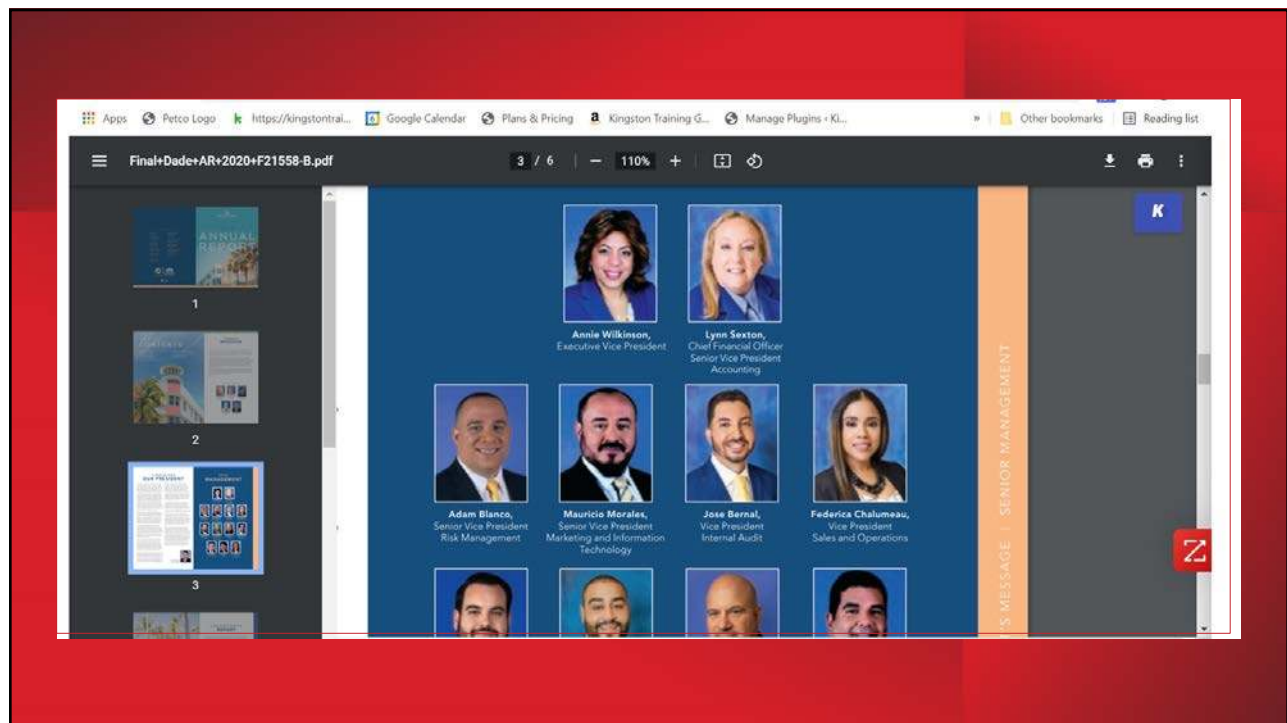


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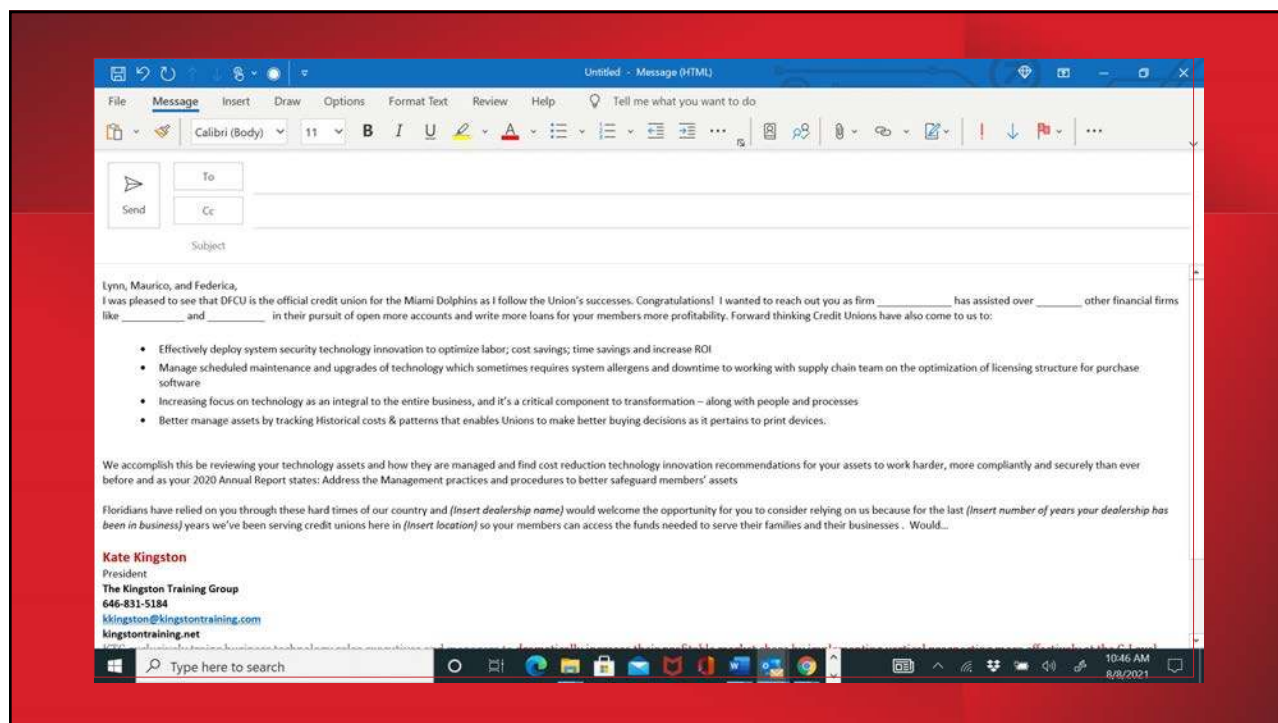




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## C-Level Decision Maker Meat Sheets

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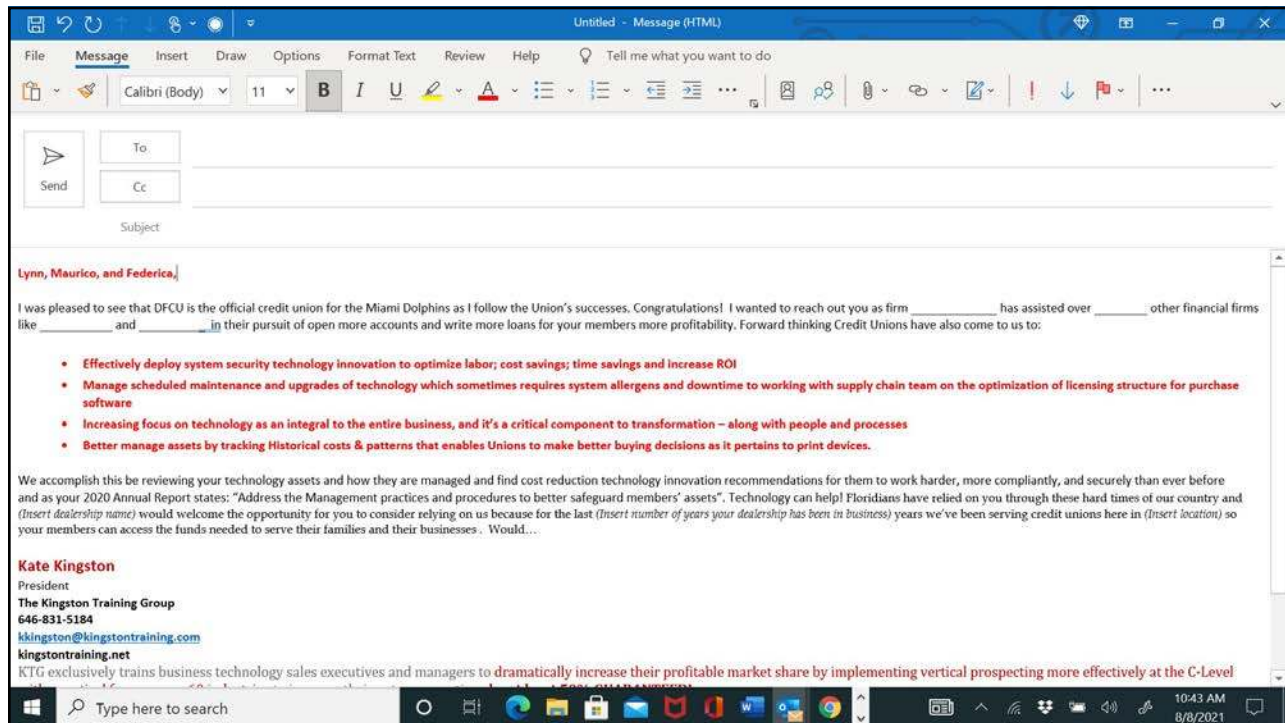
- <https://www.cio.com/newsletters/signup.html>
- <https://www.cioinsight.com/>
- <https://go.forrester.com/blogs/>

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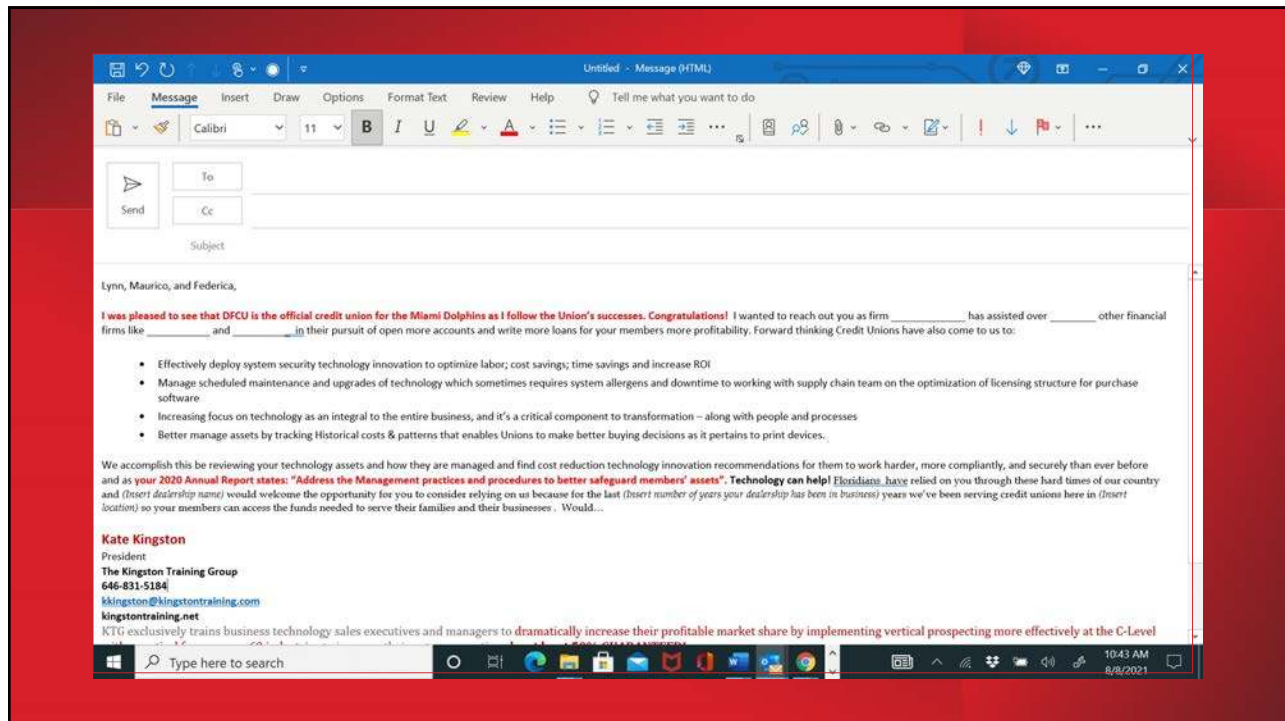
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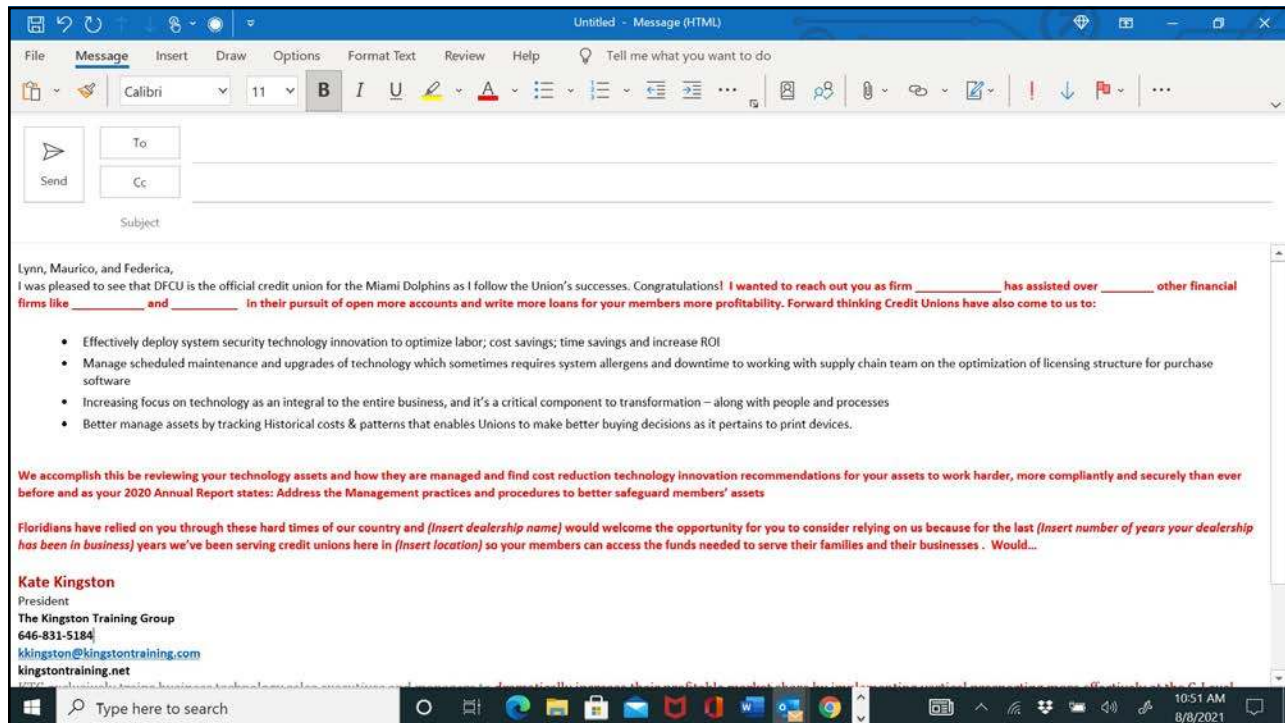


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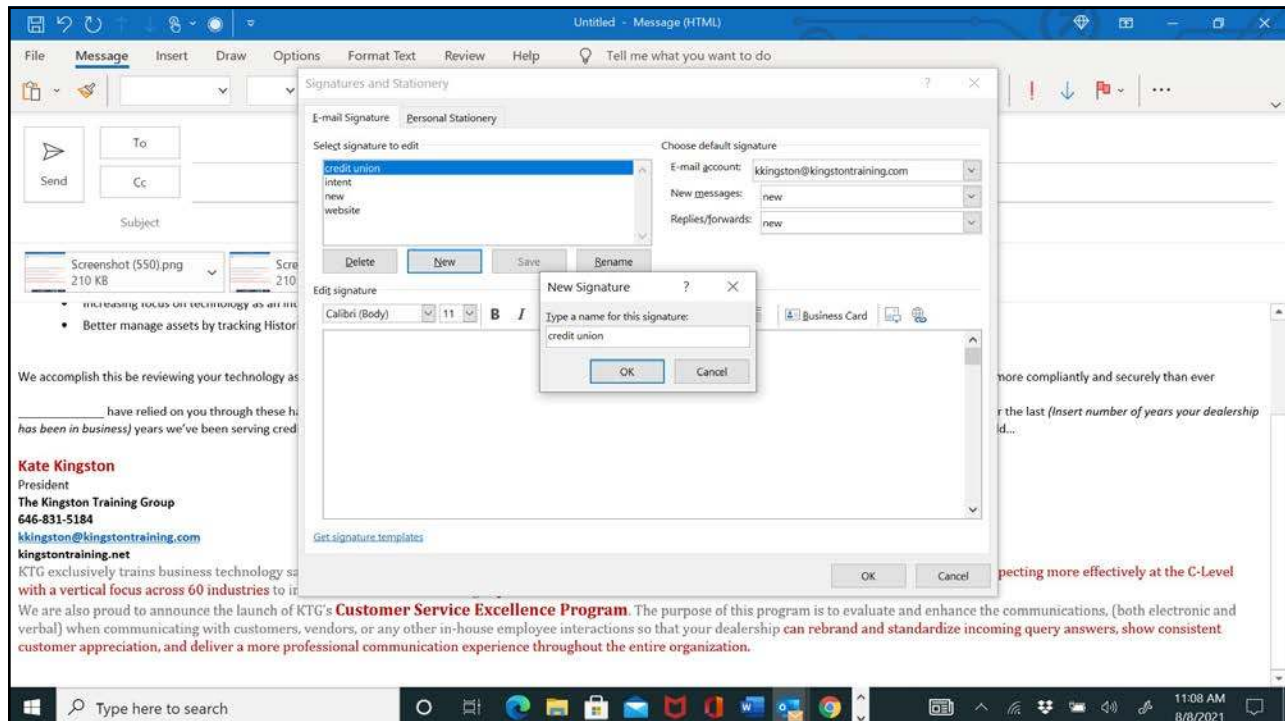


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Monday		Tuesday		Wednesday		Thursday		Friday	
19		20		21		22		23	
M	Forecasting Call : Shandi Toney	Daily Prep Eric Thomas	Blue Prospecting Meeting Shandi Toney	Daily Prep Eric Thomas	Daily Prep Eric Thomas				
M	Demo Call Block Eric Thomas	Call Block for Demos Eric Thomas	Call Block for Demos Eric Thomas	Call Block for Demos Eric Thomas	Call Block for Demos Eric Thomas				
M		Prospect or Meeting Time	QBR Mass 210 FOUR Eric Thom	Blue Tech	Prospect or Meeting Time				
M					Prospect or Meeting Time				
M	Open Time/Misc Eric Thomas	Open Time/Misc Eric Thomas	Open Time/Misc Eric Thomas	Open Time/Misc Eric Thomas	Open Time/Misc Eric Thomas				
M	Prospect/Meeting Time	Accurate Nursing accurate office Eric Thomas	Prospect/Meeting Time	Prospect/Meeting Time	Prospect Meeting Time				
M			Blue Technology	discovery/ Lake					
M									
M			KTG Workshop		Friday Check Out / Week Roll Up				

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# PARTNERSHIPS

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# The Consortium Members

A Think Tank to Bring Business Agility to the Imaging Channel



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63% of U.S. customers say they have stopped doing business with a brand due to a poor customer service experience.  
(Source: Microsoft)

It takes 12 positive experiences to make up for one unresolved negative experience.  
(Source: Providesupport.com)



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ANYONE CAN SELL COPIERS...  
BUT IT'S THE CUSTOMER SERVICE  
THAT KEEPS THE CLIENT.

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## Attract & Retain Long Term Profitable Clients

- Vertical prospecting across 60 industries for your entire sales force – *including leads & lists and top account training* - to guarantee a sustainable 50% increase in Net New meetings.
- Focus on full solution opportunities of meetings and sales for IT, Managed Services, MPS, ECM, Networking, Unified Communication, software and hardware solutions.
- Implementing customer service excellence.

Special Offer:  
25% off for the  
first 10  
dealerships to  
sign up before  
October 1<sup>st</sup>  
2021

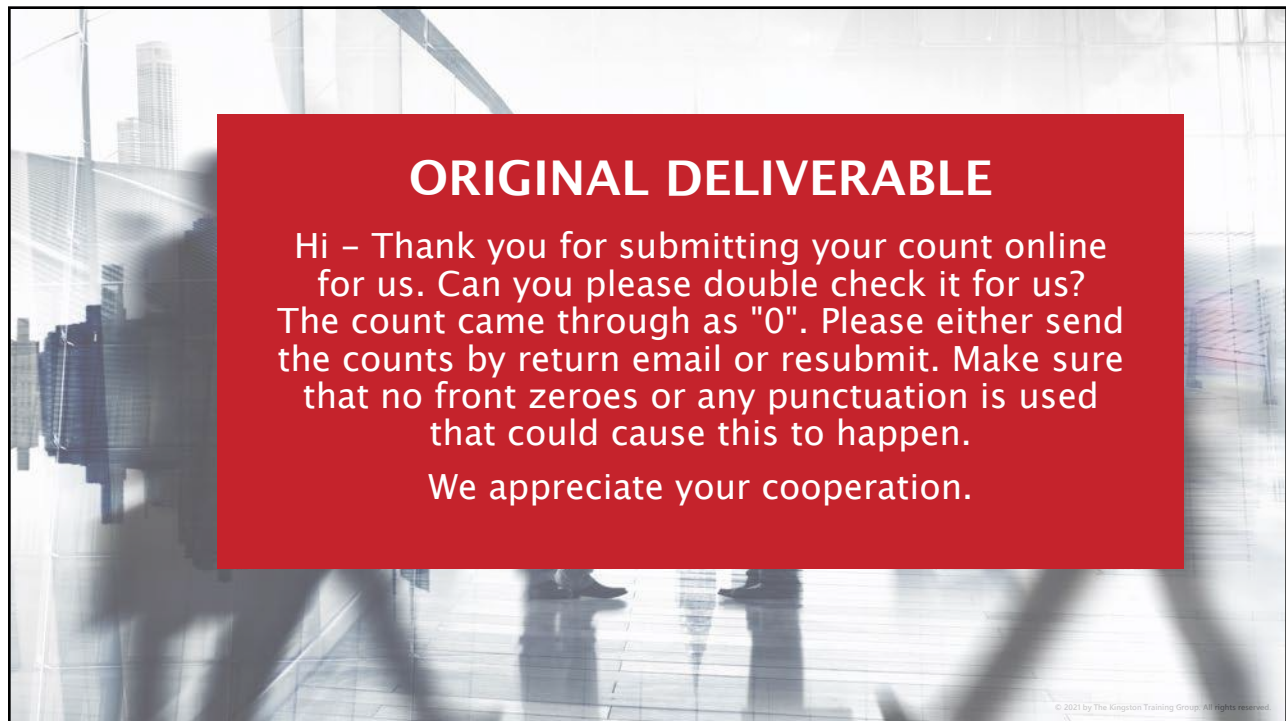
- Up leveling social selling and cause marketing to better brand the individual sales executive and your dealership.
- Successfully Identify and Onboard new high performing sales talent

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Group

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## KTG Enhancement

**Subject Title:** Good morning *(Insert clients name)*. I had a quick question regarding your online count submission for copies from *(Insert your name)* to *(Insert your dealership name)*.

**Body:** Good morning *(Insert their name)*.

I am writing to thank you for submitting your meter reading online for us. Here at *(Insert your dealership name)*, we continue to strive towards reducing the workload for our clients, even when delivering important information to us. We are glad that the online submission is working for you. When you submitted, the count came through as "0". We would ask if you could double check your numbers and make sure that no front zeroes or any punctuation is used. That is usually the cause of a "0" value submission. Please resubmit online, or if you prefer, you may respond with your numbers via email.

*(Insert your dealership name)* appreciates your business. We are focused on the success of *(Insert the name of their company)* through technology innovation.

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## New Ticket Created Email Template

**Subject Title:** Good morning *(Insert clients name)*, I am writing to let you know *(Insert your dealership name)* is currently working to quickly resolve your technology issue. We are on it! - *(Insert your name)* from *(Insert your dealership name)*

**Body:** Dear *(Insert their name)*,

This email is to notify you that we have received your request for assistance with a technology issue. We will work with you to solve this as quickly as possible. I have personally connected with our technical support team members and a Systems Engineer will contact you to work with you to resolve this issue. Thank you for this opportunity to deliver a quick resolution.

We appreciate your business. Your Technical Support Team.  
*(Insert your contact info)*

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**MAKE MORE  
MEETINGS,  
MAKE MORE  
MONEY  
SALESFORCE  
PROSPECTING  
PROGRAM**

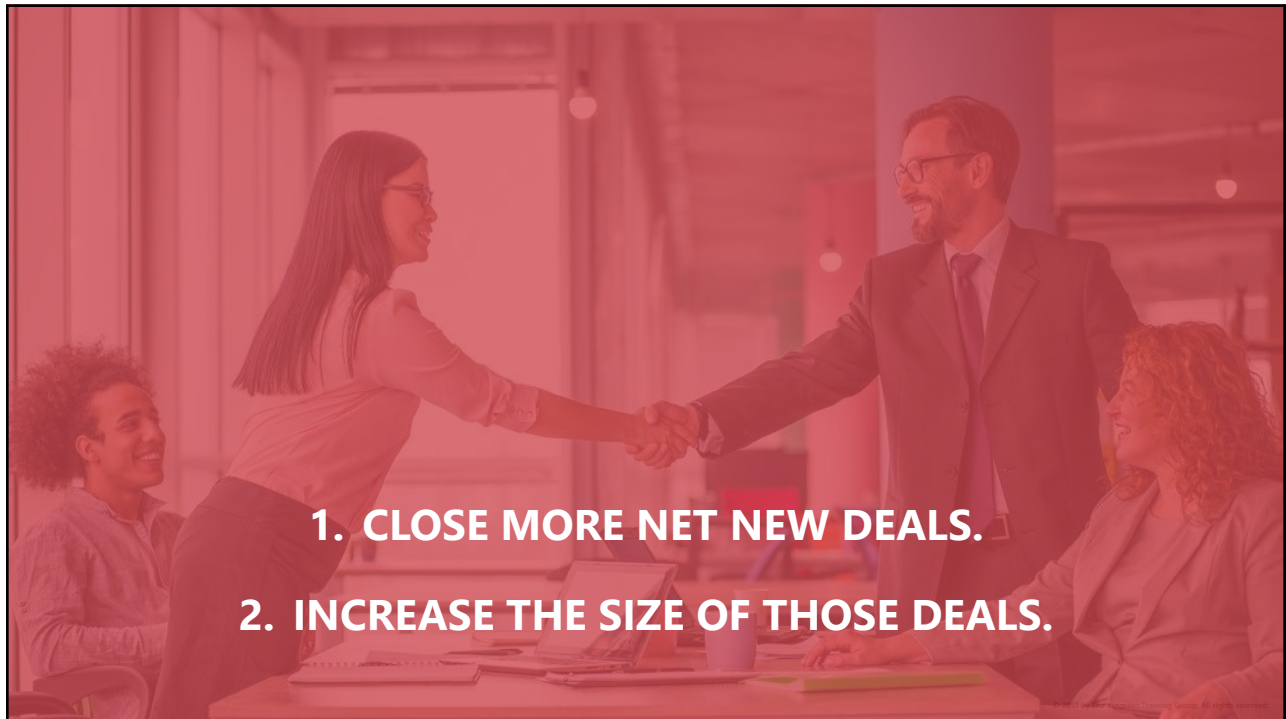
## TO DO LiST

1. **MAKE**
2. **MORE**
3. **MONEY**



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1. **CLOSE MORE NET NEW DEALS.**
2. **INCREASE THE SIZE OF THOSE DEALS.**

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*"Applied Imaging has used Kate Kingston's training to produce more appointments for our sales force.  
**There has been a 25% increase in our monthly revenue.**  
 We have experienced a 50% increase in the weekly appointment's schedule. She taught us time management and appointment closing techniques.  
 I recommend Kate without reservation."*

**- John Lowery**

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**RJ YOUNG COMPANY**

**167% GROWTH**  
**in 2 months**

Meetings Before KTG      Meetings After KTG

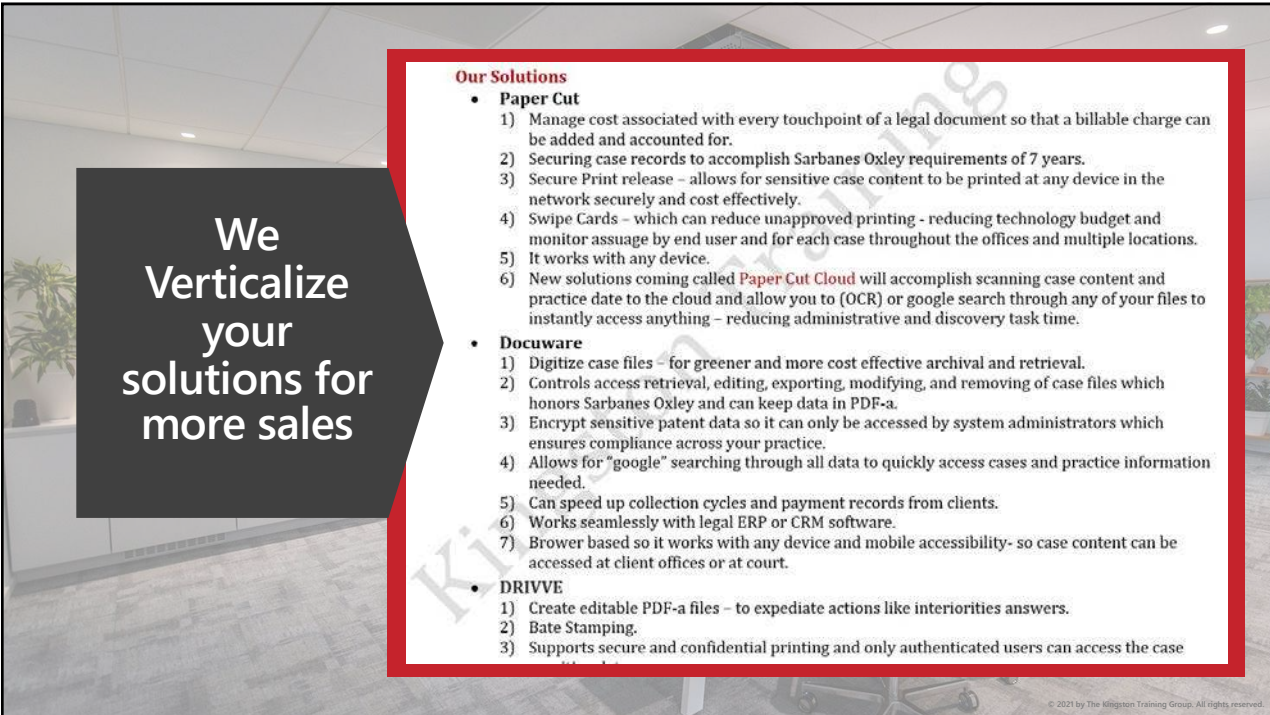
**RJY Young Company has made \$358,583.74 from KTG deals, resulting in a 492.9% ROI in the first four months of the training!**

"In working with Kate Kingston and her program we have seen early results in setting appointments and meetings. These results, with a variety of sales representatives have shown a 167% increase in meetings and appointments. We have found the training is especially helpful with our new sales representatives as it gives them confidence in getting in the doors of zero-based accounts."

**— Hunter McCarty**  
**COO of RJ Young Company**

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**We  
Verticalize  
your  
solutions for  
more sales**

**Our Solutions**

- **Paper Cut**
  - 1) Manage cost associated with every touchpoint of a legal document so that a billable charge can be added and accounted for.
  - 2) Securing case records to accomplish Sarbanes Oxley requirements of 7 years.
  - 3) Secure Print release – allows for sensitive case content to be printed at any device in the network securely and cost effectively.
  - 4) Swipe Cards – which can reduce unapproved printing - reducing technology budget and monitor assuage by end user and for each case throughout the offices and multiple locations.
  - 5) It works with any device.
  - 6) New solutions coming called **Paper Cut Cloud** will accomplish scanning case content and practice date to the cloud and allow you to (OCR) or google search through any of your files to instantly access anything – reducing administrative and discovery task time.
- **Docuware**
  - 1) Digitize case files – for greener and more cost effective archival and retrieval.
  - 2) Controls access retrieval, editing, exporting, modifying, and removing of case files which honors Sarbanes Oxley and can keep data in PDF-a.
  - 3) Encrypt sensitive patent data so it can only be accessed by system administrators which ensures compliance across your practice.
  - 4) Allows for "google" searching through all data to quickly access cases and practice information needed.
  - 5) Can speed up collection cycles and payment records from clients.
  - 6) Works seamlessly with legal ERP or CRM software.
  - 7) Brower based so it works with any device and mobile accessibility- so case content can be accessed at client offices or at court.
- **DRIVE**
  - 1) Create editable PDF-a files – to expediate actions like interiorities answers.
  - 2) Bate Stamping.
  - 3) Supports secure and confidential printing and only authenticated users can access the case

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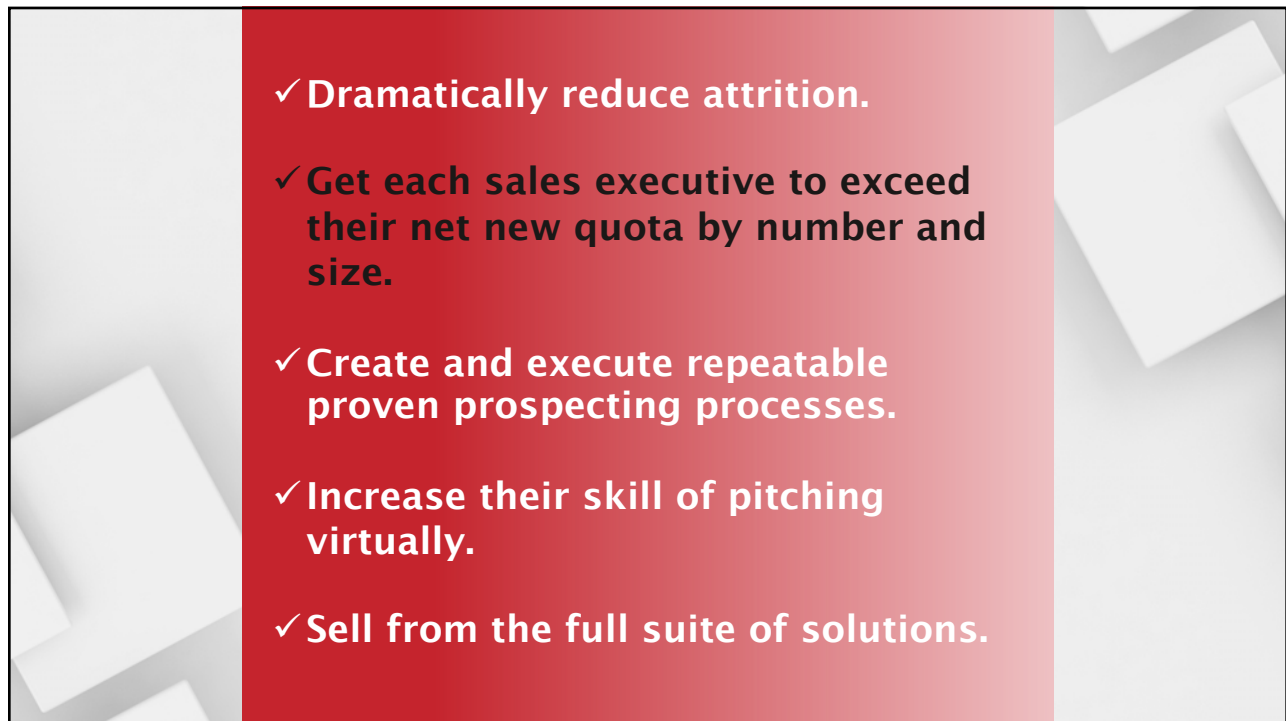
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**KTG**  
**Deeper Dives  
into  
60+ Industries**

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- ✓ **Dramatically reduce attrition.**
- ✓ **Get each sales executive to exceed their net new quota by number and size.**
- ✓ **Create and execute repeatable proven prospecting processes.**
- ✓ **Increase their skill of pitching virtually.**
- ✓ **Sell from the full suite of solutions.**

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## Kate Kingston



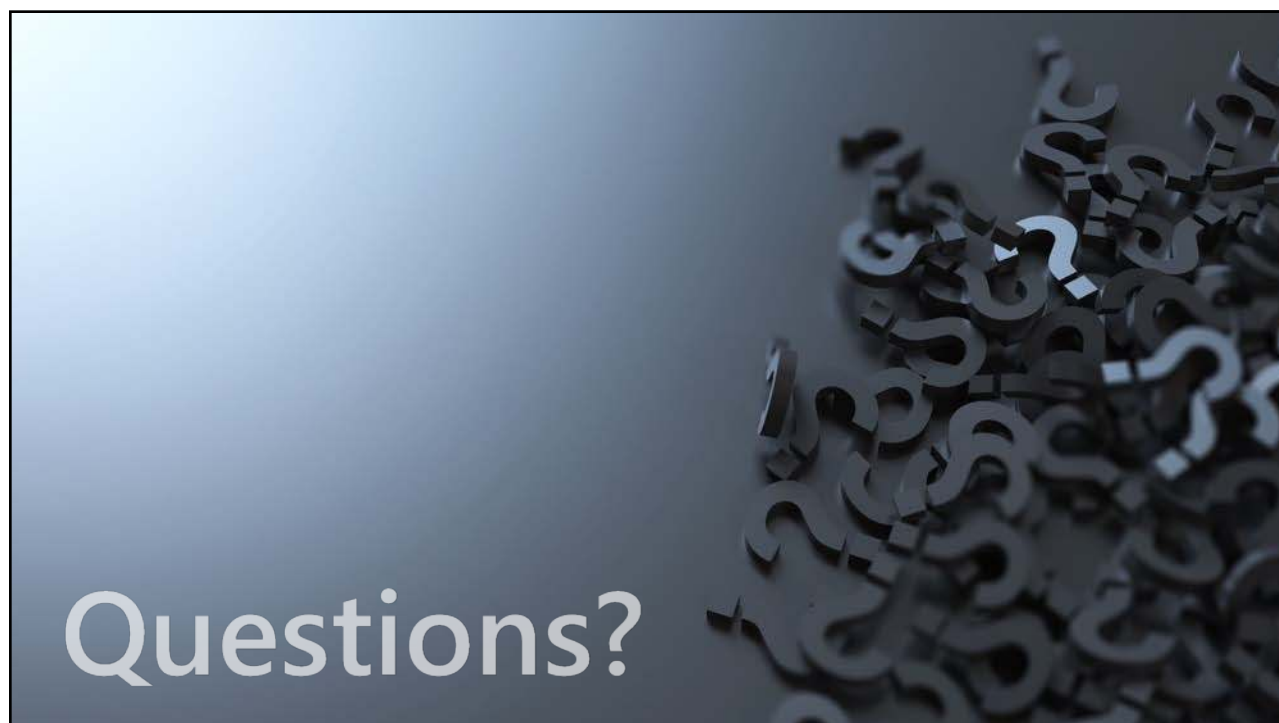
**Guaranteed a sustainable 50% increase in net new meetings across your entire salesforce or the training is FREE!**

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