MiM® Quick Start

MEASURED IN MILLIONS

BRAND, TECH, & TOOLS

MEASURED IN MILLIONS

What is “Brand” through the MiM® Lens?

Brand is how your business shows up visually, verbally, and behaviorally to signal that you are ready for multimillion-dollar relationships.

It’s not just marketing or design; it’s the *system of signals* that tells the market whether to trust you. Every color choice, headline, and handshake adds up to one story: we are credible, capable, and ready for your business.

A strong brand:

- Translates capability into confidence. It helps others feel your competence before you ever speak.
- Builds trust through consistency. Every touchpoint — digital, physical, and personal — aligns.
- Demonstrates readiness. Modern isn’t trendy; it’s timelessly competent and clear.

When your brand is aligned, every interaction becomes proof of trust.

MEASURED IN MILLIONS

What is “Technology” through the MiM® Lens?

Technology is the connective infrastructure that determines how easily relationships move through your business.

It’s not just software or systems, it’s how seamlessly people can engage, follow through, and trust that your company is capable of delivering at scale. Every integration, automation, and dashboard either strengthens that confidence or creates friction that quietly erodes it.

A strong technology ecosystem:

- Creates access, not obstacles. It helps people connect and collaborate without extra steps or confusion.
- Supports follow-through. Automated processes ensure commitments are met consistently.
- Demonstrates operational maturity. The right tools show that your business is built for scale and reliability.

When technology works, relationships move faster and trust grows deeper.

MEASURED IN MILLIONS

MEASURED IN MILLIONS

What are "Tools" through the MiM® Lens?

Tools are the everyday enablers of your team's performance — the practical extensions of your brand and technology that make consistency possible.

They translate intention into action. Whether it's a CRM, sales collateral, or internal template, every tool either reinforces clarity or adds noise.

Strong tools:

- Enable consistency. They help every team member deliver the same high standard of communication and execution.
- Reflect professionalism. The materials and processes you use internally mirror the experience you promise externally.
- Build confidence in delivery. Well-designed tools make great behavior easy and reliable.

When tools align with brand and technology, the company operates as one coherent system, every part reinforcing trust.

MEASURED IN MILLIONS

These function as a trifecta:

- **Brand** signals readiness.
- **Technology** enables flow.
- **Tools** ensure follow-through.

MEASURED IN MILLIONS

THE BUILDING BLOCKS OF RELATIONSHIP READINESS

A
Brand

Signal credibility before you speak. Every detail should say, "we're ready for your business."

- **A1** Brand & Value Proposition
- **A2** Proof & Performance
- **A3** Digital Presence

B
Tech

Power trust through seamless systems that make connection and follow-through effortless.

- **B1** CRM & Integrations
- **B2** Automation & Workflows
- **B3** Analytics & Insights

C
Tools

Elevate the customer journey with smart, integrated systems that make every interaction easy and intuitive.

- **C1** Sales Tools
- **C2** Client Experience Tools
- **C3** Internal Collaboration

A | BRAND:
SIGNALS OF CREDIBILITY

This is about communicating credibility through every signal — design, language, and experience that prove you're ready for serious business.

BRAND & VALUE PROPOSITION

A compelling brand identity and value prop that make a great first impression and attracts people to learn more.

A1

PROOF & PERFORMANCE

Your case studies, testimonials, and results are visible, specific, and recent, providing evidence that you deliver on what you promise.

A2

DIGITAL PRESENCE

Your website and other digital properties (LinkedIn profiles, etc) are updated and effectively represent your company.

A3

MEASURED IN MILLIONS

A1

BRAND & VALUE PROPOSITION

A compelling brand identity and value prop that make a great first (second and third) impression and attracts people to learn more.

Effective branding and clear, differentiated value propositions are critical for the success of mid-market companies. It isn't just about logos and colors; it's about shaping your entire business identity.

There are 5 key impact areas of an effective brand and compelling value proposition:

- **Recognition and Recall** - Strong branding helps your business get recognized more often. When your brand stands out with a distinct logo, attractive colors, and other visual elements, people are more likely to remember it.
- **Trust Building** - A business with clear, professional-looking branding appears more established and credible.
- **Differentiation** - It clarifies what your company stands for, its values, and its unique selling proposition. A well-defined brand sets you apart and attracts the right audience.
- **Emotional Connection** - Brands evoke emotions. When customers connect emotionally with your brand, they become loyal advocates.
- **Market Presence** - A strong brand establishes a market presence. It helps you occupy space in the minds of your target audience.

When people think of a product or service category, you want your brand to be top-of-mind. An effective brand and value proposition achieves this goal.

DONE WELL

- Your logo and visual brand look better than your competitors or peers.
- Clear and compelling value propositions defined and documented for each Ideal Customer group.
- Brand and value prop influence and guide all messaging and content across web, sales tools, etc.
- Your customers are proud to wear apparel with your branding.

DONE POORLY

- Logo or website appear out dated or lagging behind.
- Generic value prop that doesn't intrigue people to learn more.
- No apparel or branded swag that anyone would want to use.

A2

PROOF & PERFORMANCE

Concise, credible evidence that shows the value you've delivered and the trust you've earned.

Well-designed proof points like case studies, testimonials, and results capture the interest of potential customers, demonstrate real impact, and make your value tangible.

Case studies tell the story behind success. Testimonials validate it with credible voices. Results snippets quantify it with concise, repeatable examples. Together, they form the foundation of trust that helps prospects believe you can do for them what you've done for others.

A modern organization consistently:

- Documents results and customer wins as they happen.
- Publishes at least 3–5 relevant, well-designed case studies in multiple formats.
- Trains teams to use proof points naturally in conversations and proposals.

Proof becomes part of the sales and marketing rhythm, not an afterthought.

DONE WELL

- No less than 3 relevant and well designed case studies available in multiple formats – slides, downloads, email copy, scripts, video-walk through, etc.
- Sales team regularly uses library of case studies and results snippets to communicate with prospects and customers.
- Measurable usage of case studies and result snippets.

DONE POORLY

- Case studies and results snippets are difficult to access or hard to find.
- Emails and call scripts that include results are ad hoc and 'freestyled'.
- No method of tracking usage of case studies or results snippets.

A3

DIGITAL PRESENCE

An updated website and supporting digital assets — including social media, reviews, and online content — convey your company as modern, credible, and thriving.

Your digital presence is the impression people form of your business before they ever speak to you. It spans every online touchpoint that signals who you are and how ready you are to serve. A modern presence builds confidence and access; an outdated or inconsistent one quietly erodes both.

Modern buyers don't separate online and offline impressions — they stack them. Every click, scroll, and search either reinforces confidence or raises doubt. A credible digital presence signals a healthy, modern business that pays attention to detail.

Your design, copy, and navigation work together to say, "We're serious about our relationships — and we're ready for yours."

A strong digital presence is:

- **Functional:** Fast, mobile-first, and easy to navigate.
- **Intentional:** Every page exists for a reason and drives action.
- **Human:** Voice, visuals, and structure feel personal, not templated.
- **Current:** Updated regularly with proof of life — news, content, results.
- **Consistent:** Aligned across every digital channel, from email to LinkedIn to your website.

If your online experience doesn't reflect your offline excellence, your credibility is leaking in real time. Modern companies treat their digital presence as part of their operating system — not a marketing project, but daily proof of performance.

DONE WELL

- Website is actively updated (and measured) monthly with Call-to-Actions that convert visitors into inquiries.
- Videos that effectively communicate what you do and who you do it for.
- Multiple media formats (videos, PDFs, downloads) support primary messaging.
- Consistency across desktop and mobile devices.

DONE POORLY

- At the bottom of your website it says "copyright any-year-other-than-the-current-year".
- Social profiles are non-existent or haven't been updated in months.
- "SEO copy" on web pages dilutes messaging and value prop content.

B | TECH:
SYSTEMS OF TRUST

This is about creating seamless systems that make it effortless to connect, collaborate, and follow through — the invisible infrastructure that builds trust at scale.

CRM & INTEGRATIONS

Connects your systems and customer data so information and communication flow seamlessly across the business.

B1

AUTOMATIONS & WORKFLOWS

Automated systems that keep relationships moving and ensure follow-through happens effortlessly.

B2

ANALYTICS & INSIGHTS

The dashboards and metrics that track engagement, performance, and relationship health, turning data into smarter decisions.

B3

CRM & INTEGRATIONS

The data, systems and technology you use to organize actions, information and intel about your highest value relationships.

A CRM should serve as the single source of truth for customer and prospect data, connecting every conversation, opportunity, and system giving the business a shared, real-time view of relationships and performance.

A modern sales organization manages three key elements of relationship data with consistency and clarity:

- **Contacts:** every person connected to your business relationships
- **Companies:** every organization engaged in your sales or client ecosystem
- **Deals:** every opportunity in motion toward growth or renewal

When properly integrated, your CRM eliminates silos, syncing data between marketing, sales, delivery, and finance systems so everyone works from the same story.

This phase isn't just about software; it's also about the behaviors within it.

Technology doesn't transform dysfunction; it amplifies it. Your CRM reflects the habits of the people who use it. If data is inconsistent or ignored, the system becomes a mirror of that chaos. But when teams maintain discipline, entering clean, accurate information and engaging with it daily, the technology turns disciplined habits into predictable performance.

DONE WELL

- Every contact and account is entered and updated in real time.
- Notes, activity logs, and communication history are consistently updated.
- All deals include current stages, amounts, owners, next steps, and close dates.
- Integrations sync data automatically between connected systems.
- Leadership can trust CRM reports as a real-time reflection of pipeline health.

DONE POORLY

- Contacts and opportunities are incomplete, outdated, or duplicated.
- Deals live in inboxes, not the CRM, making reporting unreliable.
- Pipeline stages are inconsistent or skipped entirely.
- The team doesn't regularly clean, audit, or maintain CRM data.

B3

AUTOMATIONS & WORKFLOW

The systems and triggers that keep actions moving forward, ensuring timely follow-up, consistent communication, and reliable delivery without manual effort.

Automation bridges the gap between intent and follow-through. It ensures prospects are nurtured, customers are followed up with, and internal steps happen on time — without depending on individual effort or manual reminders.

A modern organization uses automation to:

- **Streamline communication:** trigger timely, relevant outreach across the relationship journey
- **Reduce friction:** eliminate redundant data entry and repetitive administrative work
- **Protect consistency:** ensure every lead, deal, and customer receives a predictable, professional experience

This phase isn't about replacing people; it's about supporting them.

Automation doesn't remove the human touch — it protects it. When workflows handle the repetitive tasks, people have more time to focus on connection, strategy, and creativity. Poorly designed automation, however, creates confusion, duplication, and missed moments that weaken trust.

DONE WELL

- Lead and client follow-ups are automated and tracked.
- New contacts are automatically routed to the right owner or team.
- Internal alerts or tasks trigger when deals change stage or status.
- Workflows are documented and reviewed quarterly for accuracy.
- Automation outcomes (deliveries, emails, task creation) are monitored weekly.

DONE POORLY

- Follow-ups depend on manual effort or individual memory.
- Automations fail, duplicate, or send outdated information.
- No one monitors automation performance or logic.
- Communication tone feels robotic or off-brand.
- No documentation defines what is automated versus manual.

B6

ANALYTICS & INSIGHTS

The data and dashboards that measure performance, reveal patterns, and guide smarter decisions across marketing, sales, and operations.

Analytics and insights are the translation layer between activity and impact. Every system in your business — CRM, marketing automation, finance, operations — creates data, but only connected, contextualized reporting creates real understanding.

When done well, analytics make performance visible: leaders can see the health of the pipeline, the effectiveness of campaigns, and the efficiency of teams. When done poorly, dashboards confuse more than clarify, or worse, don't exist at all.

Good analytics go beyond vanity metrics. They connect behavior to results, align with strategy, and drive timely action. They tell the story of progress — not just performance.

DONE WELL

- Core metrics are clearly defined and reviewed regularly.
- Dashboards update automatically with reliable data.
- Systems are integrated for a single, accurate view.
- Reports focus on insights that drive decisions.
- Data informs action at every level of leadership.

DONE POORLY

- Reports are manual, inconsistent, or outdated.
- Metrics don't connect to business goals.
- Different teams report conflicting data.
- Leadership relies on anecdotes, not evidence.

C

TOOLS:
AMPLIFIERS OF EXPERIENCE

This is about creating seamless systems that make it effortless to connect, collaborate, and follow through — the invisible infrastructure that builds trust at scale.

SALES TOOLS

Connects your systems and customer data so information and communication flow seamlessly across the business.

C1

CLIENT EXPERIENCE TOOLS

Integrated systems that create consistent, personalized interactions and ensure follow-through happens seamlessly.

C2

INTERNAL COLLABORATION

Connected tools that improve visibility, align teams around shared goals, and turn insights into coordinated action.

C3

C1

SALES TOOLS

The library of clear, credible, and easy-to-access materials that reinforce your value and make it effortless for customers and partners to say yes.

Your sales tools are proof of competence at scale — they show, not tell, that your company is ready for serious business.

Modern buyers judge your credibility long before a contract appears. Sales tools — videos, landing pages, decks, one-pagers, FAQs, comparison grids, send-me-somethings, and proof libraries — are how you demonstrate readiness in real time. These assets don't just "look good"; they answer questions, eliminate friction, and create trust without requiring another meeting.

When built well, they're organized in one system, updated regularly, and adaptable for multiple use cases. When neglected, they become scattered, outdated, or lost — eroding confidence faster than you realize.

Send-Me-Something Examples

- "Bundling" of testimonials and case studies and other content to support a campaign.
- Door openers or branded-gifts.
- Comparison Grids of your products or your competitors.
- Frequently Answered Questions.
- Articles or relevant industry reports.
- Listing your common objections with default responses.
- Product-specific photos or videos.
- Explaining the process of what it's like to do business with your company.
- Special offers, discounts or offers.

DONE WELL

- No less than 5 pieces of collateral that support landing and expanding key relationships.
- A regularly updated library of Sales Tools easily accessible – no more than 3 clicks away.
- Same content used across multiple formats – sell sheets, slides, explainer videos, etc.
- Measurable usage of Sales Tools & Send Me Somethings.
- Evaluated for improvements twice a year.

DONE POORLY

- Low resolution, poor quality or large files that load slowly.
- Not available via one-click online. Stored on a random G: drive or someone's desktop.
- Over a year old without being evaluated for relevancy.

C2

CLIENT EXPERIENCE TOOLS

The systems and touchpoints that shape how clients feel working with you, creating a consistent, personalized, and effortless experience from first contact through renewal.

Your client experience tools are proof of reliability at scale. It shows that your business delivers with care, clarity, and consistency every time.

Modern clients expect every interaction to feel seamless. They notice when communication breaks, when follow-up lags, or when service feels impersonal. Systems that anticipate needs, automate reminders, and simplify collaboration build trust faster and keep clients engaged longer.

When built well, your client experience turns customers into advocates and relationships into recurring revenue. When neglected, it creates friction, missed opportunities, and slow erosion of trust.

DONE WELL

- Automated follow-ups that feel personal and timely.
- Clear handoffs between teams with no dropped threads.
- Shared dashboards that give clients real-time visibility.
- Regular check-ins that show care and measure satisfaction.
- Documented processes that scale quality and consistency.

DONE POORLY

- Inconsistent communication or repeated requests.
- Limited visibility into project status or next steps.
- Follow-ups dependent on memory instead of systems.
- Clients feeling like they have to manage you.

MEASURED IN MILLIONS

C3

INTERNAL COLLABORATION

The systems, communication tools, and shared data that keep your team connected, aligned, and performing with clarity.

Your internal collaboration is proof of relational strength at scale. It shows how well your business shares information, supports each other, and delivers a unified experience to clients and partners.

When internal communication breaks down, relationships suffer on every level. Promises are missed, follow-ups stall, and the client feels the gap. Teams that communicate clearly and operate from shared visibility create consistency — and consistency is what builds trust.

When built well, internal collaboration strengthens every relationship inside and outside the company. When neglected, it creates confusion, rework, and a visible disconnect between what's said and what's delivered.

DONE WELL

- The team uses a shared communication platform for updates and collaboration.
- Processes are documented for handoffs and cross-department workflows.
- A central dashboard or system provides visibility into priorities and progress.
- Information and resources are easy to access across the organization.

DONE POORLY

- Teams rely on scattered tools and inconsistent communication.
- Handoffs are informal or frequently missed.
- No single source of truth for priorities or accountability.