Partnerships Onboarding Package

2021-2022

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Contents

Welcome to QMIND's 2021-2022 Client Acquisition Team

Client Acquisition is an incredibly important part of our organization. Since QMIND's inception, QMIND has been working with real-world clients solving real-world problems.

In this package, you will find details about the client acquisition process from start to finish, which will include your responsibility as a PM or DOD, templates for messaging, and other guidelines.

Your Primary Contact

Hamza Sherik – Directors of Partnerships

Hamza is our Director of Partnerships. He oversees partnerships in general within QMIND but his focus this year is mainly on client acquisition for our 30+ design teams. As the Director of Partnerships, Hamza is responsible for developing, executing, and managing the new decentralized client acquisition protocol.

- **Email:** hamza.sherik@queensu.ca
- **Phone Number:** (343) 989-2919

Client Acquisition Overview

Client acquisition is incredibly difficult to plan and execute, and even if we develop and execute a client acquisition strategy / process that is bullet-proof, the results are mostly out of our hands. The contacts we reach out to have the ability to provide us with a once-in-a-lifetime opportunity, but that is up to them. Because of that, the strategy we are implementing this year aims to maximize both the likelihood of securing client-facing projects and the quality of projects by using you guys, the PMs and the DODs.

Client Relations

An important part of client acquisition is managing client relations. Specifically, we want to portray a professional and consistent image with everyone we connect with while building genuine personal bonds. The impact of this will be seen directly in client acquisitions, client retention, and our clients spreading awareness about QMIND. To portray a professional image, we as a group must keep a more unified face for QMIND's interactions with corporations and the industry. This document will provide you with the necessary tools to do so. Additionally, you will be provided with QMIND's External Partnership Package which details all relevant information to clients in an easy to understand yet extremely professional way. Constructing personal bonds with clients is very crucial to QMIND's success as a club. Developing a personal bond requires us to reach out consistently to check-in and say hello, wish that person a happy birthday, etc. This provides the client with a better experience with QMIND and makes them more likely to strike deals with us this year, in future years, and tell others about the amazing work QMIND does. Ways to construct bonds with clients mainly includes finding an interest you both share, uncovering personal information about them, and finally just staying in touch. Examples can look like:

- "Sounds like you had a great weekend playing golf, I also enjoy playing golf"
- "How has quarantine been with the family"
- "Hi Paul, Just wanted to reach out and wish you a happy thanksgiving, Enjoy the long weekend"

Make sure that you establish this personal connection at the very beginning when speaking to them via email or over the phone so that it does not seem creepy or ingenuine later into your relationship. A great way to ensure you get these more personal topics is to ask them easy questions over the phone or via email to get them to speak more about themselves. At the end of the day, all this really means is you should always treat clients as a person first, and then get into business after.

Decentralized Partnerships

What the QMIND discovered last year was that a lot of our PM's and DOD's had strong personal connections with companies in and out of the tech space that could have provided QMIND with a plethora of client-facing projects. We want to take advantage of that reality by shifting our client acquisition strategy from centralized to decentralized.

That means the ownness is on you the PM or the DOD to bring in the clients. But guess what, this ends up being better for you, your team, and QMIND. You are now exposed to client acquisition and involved from start to finish, which means you learn more! You also build relationships with people in this space that could potentially provide you a job and/or provide members of your team a job. At the same time, we believe this partnership strategy is more sustainable in the long run. Instead of relying on the skills and relationships of 1 or a few people to bring in clients, we are relying on the design portfolio (30+ people).

Even though we are implementing this new approach, nothing is truly set in stone. If you have any feedback regarding the strategy, do not hesitate to send myself or Elan a message.

Our Goal

Our goal is to acquire minimum 16 high-quality client-facing projects, minimum 75% paid, for 2021-2022, with contracts signed and projects ready to start mid-September.

We reduced our goal to numbers, but it is our responsibility to try and acquire the best possible clients that can provide us with the best possible projects. It is hard to measure quality but that is what we want. High-quality projects. Your learning and the learning of the members of your team is at stake, so do not be afraid to push for high-quality project work. If you are not convinced that a client you have been talking to is providing good enough work, reach out to me and/or Elan (our Managing Director of Operations), and let us discuss. We do not have to say yes to every potential client.

Overview of the Process

1. LinkedIn + personal connection mapping
2. Send LinkedIn messages (only if you do not already have an email address)
3. Send emails
4. Zoom meetings
5. Sign contract

You are involvement at this stage is limited to the most important bits. You are leading the acquisition of the client, defining the scope, setting deliverable deadlines, and setting expectations. The contract negotiations (financials), legal proceedings, and other monotony will be handled by members of the operations portfolio.

If 30 of us are involved in the client acquisition process, and each of us reaches out to minimum 25 people on LinkedIn. That is 750 messages sent out. Let us assume there is an 80% response rate, so 600 of the 750 people respond. Let us assume out of those 600, 50% are unique (work at different companies, work at the same company but different divisions), so 300 of the total 750 can provide unique work. Out of those 300, we need to get at least 16 projects. 16 out of 300 is around 1/32 or ~3% conversion rate. All we need is a 3% conversion rate of relevant and unique contacts to reach our goal. That is easy!

LinkedIn

Whether you have 100 connections or 1,000 connections, your LinkedIn network is an invaluable client acquisition asset. We need to leverage your 1st degree connections to get the high-quality client-facing projects we need to provide you and your teams with value.

Tips from the Pros

Connection mapping:

- Type in key information into the shared spreadsheet
- Before you add a connection to the table, make sure you CTRL+F the spreadsheet to see if anyone else has already put that person into the table. Do not add the person if he/she already exists in the table
- If you are considering a big-name company (TD, RBC, Google), please check-in with Hamza and Elan (send a group Slack message) before adding the person / company to the list

On the initial message:

- Start off with a respectful hello
- Enforce some level of connection
- Personalize! Help them understand why there were picked (this is not a 'mass message'!)
- Outline briefly what we hope to gain and the benefits we can provide them (keep this brief)
- Aim to get their email address or the email address of someone who can help us

After no Response:

- Follow-up, follow-up, follow-up!
- Send a new message. Do not send the same message again! That reflects poorly on us.
- Make sure you consider the timing of your follow-up. Give the person 5-10 days to respond before sending a follow-up message. If you want to follow-up more frequently, you can, but make sure you are not pushing them away by being too annoying
- Send no more than 2 follow-ups unless you feel comfortable sending more. Try not to burn any bridges

After a Response:

- Get an email address! Whether it be there's or someone else who can help

After a Rejection:

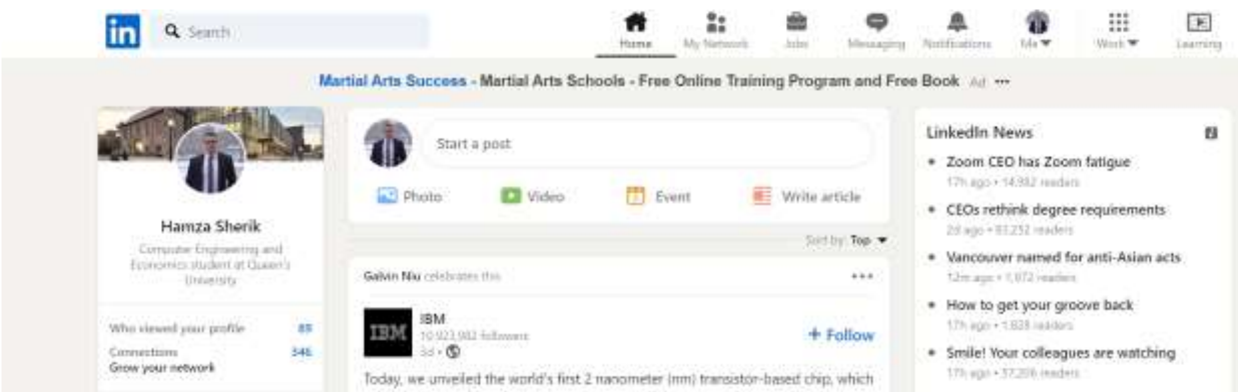
- Do not leave them on read! Respond with a kind thank you

- Maintain communication with them if you can. Check in occasionally. Just because they said no now does not mean they will say no in a couple months

Mapping

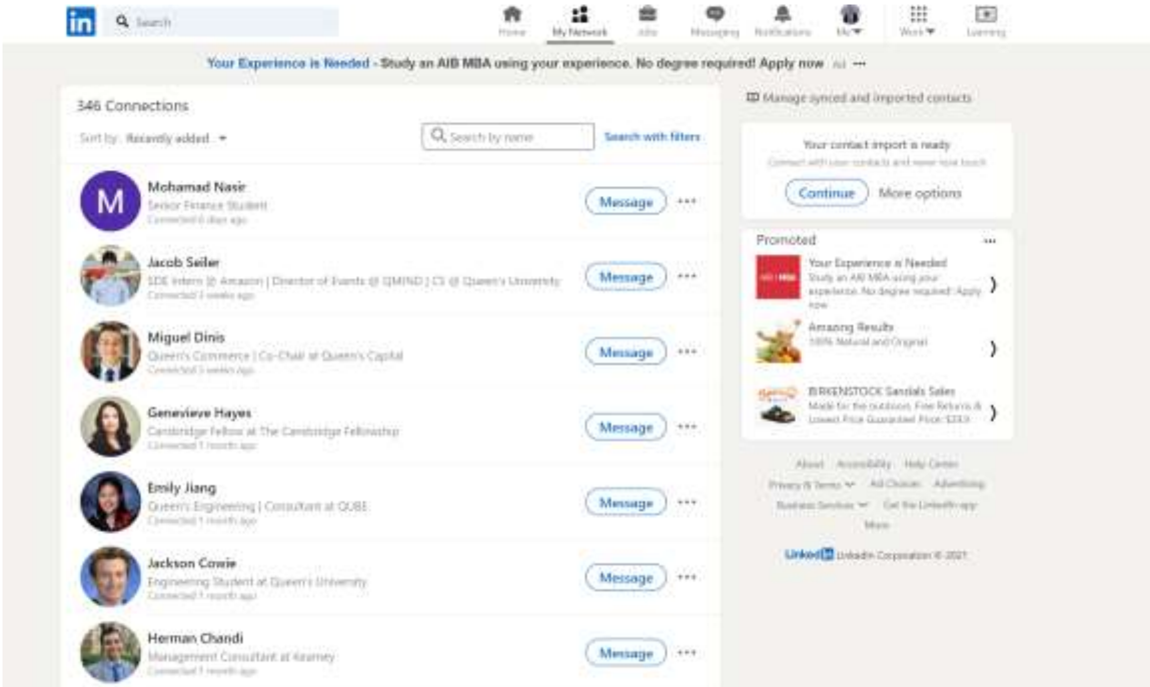
When it comes to mapping, look through your 1st degree connections on LinkedIn and any other strong personal connections you may have and record them in a shared table. We are looking for at least 25 unique people from each and every individual (PM's and DOD's included). This is not meant to take more than 30 minutes.

1. Open your LinkedIn and click on "Connections" on the left



2. Click on "Connections" on the left again

3. Scroll through your connections and record your 25 top contacts



4. Record key information and save it in the shared table

	A	B	C	D	E
1	Name of QMIND Member	Name of Contact	Company Name	Country / City of Work	Job Title
2	Hamz Sherik	Mohammad Bakh	Twilio	USA, San Francisco	Software Engineer
3					
4					

https://docs.google.com/spreadsheets/d/1Jh6Rs5JU1TV1PFHVLleXmUKvoIaVlILNCE0Sf9Zht5Y/edit?usp=sharing

Generic QMIND LinkedIn Message Template

Below is a generic QMIND LinkedIn message template. DO NOT rely on this for your messages, it should ONLY be used as a guide when creating your personalized messages. No client wants to read something that seems like you just copied and pasted something. **If you already have their email address, skip this step, and move on to sending an email**.

Hi [**Insert name of contact here]!**

[**Insert a personalized introduction here saying hello, asking how the person is doing, etc. You choose how you want to write this portion but make sure it is professional and respectful.]**

I am reaching out on behalf of QMIND, Canada's leading and largest undergraduate AI and machine learning organization to discuss potential partnership opportunities. I am a [**Insert position title here: Director of Design / Project Manager]** in QMIND's Consulting Division and we are looking to work with clients to solve some of their most pressing technical problems.

Could you provide me with your email address or the email address of someone at your company that could help facilitate this opportunity? We can discuss and potentially schedule a meeting over email.

Here's a link to our website: https://qmind.ca/ Some information on our consulting division is included under the "Design" header.

If anything else on the website peaks your interest, let me know, and I can connect you with the right person on our team.

Cheers,

[**Your name]**

Email

At this point, we either already have the email address of someone at the company, or we got a response from our LinkedIn message. The goal at this point is to get to the Zoom meeting as soon as possible. The email needs to be customized for the company. That means you need to have done your research before-hand. We are not asking you to know every little thing about the company, but spend a good 20-30 minutes, comb through their website and build an appreciation and fundamental understanding of the company.

Tips from the Pros

On the initial email:

- Enforce some level of connection in the email
- Personalize, help them understand why they were picked (this is not a 'mass email'!)
- Outline what we hope to gain and how they can benefit
- Should give a concise description/explanation of what QMIND is and why you are reaching out.
- Structure the email so it sounds like its a mutually beneficial opportunity. You want to avoid formulating emails that make it sound like they would be doing you a favor.
- You want to be confident and convince them that you are on the same level as them (in terms of what you have to offer) while remaining professional and polite. You do not want to come off as arrogant.

After no response:

- Follow up, follow up, follow
- Be sure to send a new email. Do NOT resend the same email. That looks unprofessional. Rephrase what you stated in the first email and usually follow up emails are shorter. You will most likely have to send several of these

After a response:

- Get to the Zoom meeting as fast as possible

After Rejection:

- Do not leave them hanging after a rejection! Respond with a kind thank you
- Maintain communication with them if you can. Check in occasionally. Just because they said no now does not mean they will say no in a couple months
- Ask them to refer you to elsewhere (they likely want to help, but cannot)

Generic QMIND Email Template

Below is a generic QMIND email template. DO NOT rely on this for your emails, it should ONLY be used as a guide when creating your personalized emails. No client wants to read something that seems like you just copied and pasted something.

Email Subject Line: QMIND x [**Company Name]** Partnership

Dear [**Person Name]**,

[**Insert writing from one of the below options]**

- My name is [**Name**] and I am [**a / the; position title**] at QMIND. We are the largest undergraduate AI and machine learning organization in Canada, based out of Queen's University in Kingston, ON, and I am reaching out to you in the hopes of discussing potential synergies between QMIND and [**respective company**]. We are particularly interested in [**company name**] because [**x, y, z**]. (*Use this option if this is your first time communicating with this person*)
- Thanks for responding to my message over [**initial mode of contact; LinkedIn/text**]! QMIND is excited about the opportunity to potentially partner with [**company name]**. We are particularly interested in [**company name]** because of [**x,y,z**]. (*Use this option if you communicated with this individual previously*)

QMIND offers potential partners a wide array of partnership opportunities, but we are particularly interested in deploying our AI and machine learning teams to help solve some of your company's most pressing technical problems.

All of us at QMIND are excited at the prospect of working alongside your team at [**company name**]. I would love to schedule a Zoom meeting with you to further discuss partnership opportunities and answer any of your questions.

Best Regards,

[**QMIND email signature template]**

Please CC hamza.sherik@qmind.ca in all emails!

Zoom Meeting(s)

As soon as the email chain with a potential client starts to discuss meetings with us, the Director of Partnerships will reach out to you directly and work with you to schedule a time that works for you, the

Director, one other Director (optional), and the potential client. **You need to have CC'd the Director of Partnerships for this to happen, so do not forget to CC Hamza Sherik.** If you forget to CC Hamza and remember after scheduling a meeting, reach out to Hamza as soon as possible.

Meeting Structure

Tasks Before the Meeting:

1. Pull up their LinkedIn (Could be useful to connect with them on LinkedIn too) / study and know their company well – this will give you the ability to customize a partnership deal for them if you know what they can bring.
2. Create a connection point (something you or QMIND has in common with them)
3. Have QMIND documents ready (external partnership package, project look-book)

Meeting Skeleton:

1. Introduction
2. Pitch QMIND
3. Ask why they want to be involved
4. Talk about what we're looking for in a connection
5. Who they are? What do they want from QMIND? Why is AI interesting for them? Have they ever worked with AI
6. Q&A

Tasks After Meeting:

1. Send them the required documents (i.e. partnerships package or anything else they wanted)
2. Follow up with an email
3. After call follow-up email has been sent, wait a week before following up again

Additional Notes:

1. The Director of Partnerships, MD of Design, and MD of Ops will take any questions on contracts, legalities, payment, benefits packages, etc.
2. If you are not comfortable leading the discussion, do not hesitate to let the Director of Partnerships or MD's know
3. It will likely take between 5-10 Zoom meetings before we sign contracts and the client is officially acquired
4. The meeting skeleton above is to make sure you touch on the most important stuff. Do not feel forced to follow that exact structure in that exact order. Be natural. Let the meeting flow in whatever direction it must
5. Designate one person to take the meeting minutes before the meeting starts! Always take notes on the meeting.

CRM

Do not worry about any of the CRM stuff. I will check in with everyone on a weekly basis and update the CRM to maintain information on where you are at. This means you need to be honest with me in the early stages of client acquisition! I cannot see what LinkedIn messages you have sent so accountability is hard to assess at the early stages. The truth is though, if you want good projects, or a project at all, you need to be accountable to yourself. It is your responsibility to execute on the minimum 25 LinkedIn messages. After that point, all emails sent to potential clients should CC me, so I will be able to update the CRM without having to check-in on each of you individually.

The idea here is that I do not want PM's and DOD's to worry about the monotony. Your focus should be on selling your skills to the clients, not updating information on a CRM platform. The CRM platform is for me to know at what stage everything is at and for data collection purposes (to be used by future teams). We believe this approach will result in more accurate CRM usage and data which ultimately helps future QMIND partnerships teams with decision-making.

Useful Information to Pitch With

This section will be dedicated to any useful information about QMIND and Partnerships that you should know or be familiar with when speaking to clients. This information will help you better answer questions and help you when you are pitching to potential clients. Feel free to use all information provided here in any way you see fit to acquire clients.

Pitching QMIND Design

"Looking for a personalized software-AI solution for your organization and access to Canada's top talent pool for future AI and machine learning leaders? Based out of Queen's University and as the largest Canadian undergraduate AI and machine learning organization, QMIND and its 200+ members are constantly looking to build dynamic partnerships with new and unique values for their clients.

QMIND not only provides impactful AI solutions to your organization's real-world problems, it also provides your organization access to the brightest students in Canada, with each of its 200+ members being hired and fostered to showcase Canadian undergraduate talent and bring value to their clients."

- Partnering with us gives you access to our talent pool:
  - QMIND is the largest undergraduate AI and machine learning organization in Canada with over 200 members; we hire and foster the best AI developers in the country
- We can solve your problems in new and unique ways with our young minds
- Our services are cheap AF, when you consider you basically get 4 interns for 8 months, for only ~$5000, that's ~$5 per hour for a team
- We are the largest club at Queens

Commonly Asked Questions

General

• Q: Why was QMIND created? A: We recognized a gap in AI at Queen's and in the Canadian Undergraduate landscape, so we filled it ourselves!

• Q: What is QMIND? A: Queen's AI Hub! The largest undergraduate AI hub in Canada. We have five major streams - our design teams, research teams, disruptive technologies teams, inQUbate startup teams, our 14-week AI educatational program, and our annual conference, CUCAI.

• Q: How many members? A: 225 members in QMIND 2020-2021!

• Q: Gender percentage from prior year? A: 20% female for QMIND 2019, but for QMIND 2020, our Board of Directors has a 50/50 gender split.

• Q: Faculty Split from prior year? A: 57% ENG, 32% comp sci, 6% ArtSci, 5% Commerce

• Q: Year Split from prior year? A: 18% 1st, 26% 2nd, 28% 3rd, 22% 4th, 6% grad

Design

- Q: How many design teams are there?
  A: Over 30
- Q: What is the breakdown of each team?
  A: All of our design teams have a range of skills from beginner to experienced. We also do our best to have a range of years within groups as well. We have found that this provides great learning and teaching opportunities within groups.
- Q: What do the students learn from working on a design project?
  A: Students will have the basic technical skills of how to code in python. Depending on the application they will also learn several different machine learning techniques. All of our projects have their own unique focus, many of our groups have built front end applications on top of their solution as well as learnt how to deploy and manage AWS/ Azure VMs.
- Q: Who are you partnered with?
  A: The Weather Network, KGH/Hotel Dieu, Trillium Health, Vena Solutions, Akira Health, ICEBERG Analytics, Two Rings Media, TD Bank, RBC, The Big Three Inc., The Co-operators, Deloitte, Novari Health, City of Kingston, Data Works, Scotiabank
- Q: What are some top projects?
  A: Some of our top projects include our partnerships with Deloitte, Weather Network and Kingston General Hospital. Our Deloitte project is focussing on sentiment analysis during Formula One races to help provide the best experience to fans. The Weather Network project is using travel data from Toronto commuters to cluster hot-spots during rush hour and how to help city planners to improve congestion and commute time. Finally, our Kingston General Hospital project is focussing on accurately solving the problem of over or understaffing and helping optimize patient flow to avoid wasted resources

COVID-19 Response

- Q: What will happen to design contracts due to COVID-19?
  A: Due to extensive planning and resource management performed over the Summer, QMIND's design teams will not see a loss of quality in our AI/ML solutions for our clients. And due to the nature of our work, we ensure that our deadlines will still be met, regardless of the COVID-19 situation.

Educate

- Q: What is the goal of the course?
  A: We are providing students with the building blocks of AI and related topics, in hopes that the skills learned in the course can be applied and boost their preparedness for industry, research, and/or personal projects.
- Q: How many students are currently enrolled in the course? What is the demographic of these students?

A: There were 65 students enrolled in the course in 2019-2020 from a wide variety of Queen's faculties. 40% of the students enrolled were female-identifying.

- Q: Can the course be used to for companies in industry?
  A: Absolutely- the course is created to be accessible to people from all backgrounds, and could be a great way to train staff and increase AI competency