

# MezTal Referral Partner Program Intro Call

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## SUMMARY KEYWORDS

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## SPEAKERS

Sarah Thomas

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 Sarah Thomas 00:13

Hi, Sarah, hey. Sarah, hi, hi, I'm just gonna wait a few moments as people are getting into the room and and I'll kick it off. Nice to see you. All you, too. I

 Sarah Thomas 01:11

Well, thank you all for joining today. I am going to record this so that we can send it to you after as a reference, and then also we'll send the deck to after as a reference and resource, i There are a few more people that have told me more coming, that there'll be a couple minutes late, but we'll be recording it so we can, we can send it out to anybody who missed it or who came in late. So no problem. There go. I We have most everyone will be there. So thank you. Thank you everybody for joining today. I think several of you have been a part of our very ill defined referral program in the past, or who have told your clients and partners and friends about us, or if they had an open position, you kind of had us in your back pocket to refer to us, if we could help, but we are going to launch a more kind of elite, closed group that we have are going to build community around. So for most of you who know me, you know that I really care a lot about community and kind of giving back to the community, and also just just building culture and community. And so I want to give you some updates today. Can everyone hear me? Okay,

 Sarah Thomas 02:34

yes, yeah. Okay, good. So I want to give you some updates today on where we're at as a company, organization, and some of the tools that we've built a brand in the US that we feel proud of, that has high integrity, and we've built a community of clients who are are growing with us and utilizing us as they open up positions. They think of us as their strategic partner. To be able to say, why don't we explore this with Med, how we can actually grow with them, and first starting off by saying, I have an open position I can't fill, and can you help me? It always comes from some necessity. But then there's also just this trusted partner where we come in and we really make them feel heard and seen, and we understand their turnover rates,

and we understand their business strategies, and we really build community around that. Then in Mexico, our goal for Mexico is to build community where the brand of Mezcal is well known and recognized within Mexico that they want people want to work for mezcal, instead of the company down the street or a large name, and, you know, the Amazons and the Oracles and large companies are down here, but they're coming to us because we've built community where they're not just a number, they feel seen and heard as well. We have benefits for them unlike anyone else, because we've also created this stickiness in this community, where they really feel engaged and they really feel a part of something that we care for them, and they care for their clients, and they all work for companies with us that are mission driven. So our first clients have been Senior Living organizations. If you know me, then you know I'm passionate about improving our aging experience as we're all getting older. How can we look to do that? And so Senior Living has been a great client base, and also I invest in advice and each tech startups. And so as a startup receives capital and grows a team, you don't even have to have that change management where you're moving office space and convincing people to work remotely, you just have a growing team and a need, and so we become your referral source to help to give us your job descriptions. We will recruit for you. We will interview for you, screen. We do all of the staff posting in our office. So once you decide you want them, you hire them, but they sit on my books. So we handle the payroll, we handle the benefits, we handle the office space and the laptop, and you as a client handle the rest. So they're on your mission with you. They're missionally aligned, working only for you, and you're controlling the day to day operations. So clients really don't miss any of the control over their brand and their mission, which is so important in senior living, in healthcare, in aging services or age tech startups, and so that's where the first part customer base is. I'm explaining that now, because it's so relevant to build a community of our referral partners. So today, we're really formally launching, in September, a group of referral partners, and I'm going to show you the resources we have for you and show you what we're trying to build for this community to make sure that while you're talking to your clients or your friends at a dinner table, the that you're able to speak the value proposition. And it's as easy as, oh, you have some talent that is an open position. Talk to me as top that's it. You don't actually have to answer anything else. You don't have to memorize any of this. Just introduce them to me, and that's all that you need to do. We'll take it from there. But we have had some folks who have asked for a little bit more. So I am just doing this kickoff call just this month to better understand, you know, who's your client base, or how who are your target clients? Who are the type of roles you're filling? So that you can speak to it, but you don't have to. It's as really easy as just talking to anyone who might have an open role and sending them our way. But we want to build a community that you feel proud of being a part of. Also, we know you have your day jobs, but you also have a lot of people you talk to, and they have problems, turnover, retention, open positions. And we have a solution we think is helpful. So if you're able to help us, we want to make that valuable for you, and provide a referral bonus and provide also additional perks and membership value. And so this isn't extending beyond. We have right now 12 people who have expressed interest and who are part of this call. It's not a program we're spreading widely. We really identified you as individual influencers and people who could speak to this, and also have people who, in your sphere of influence, who have needs. So I just want to go through a little bit of the resources we have for you, one we'll send this to you. Don't need to read to you. You're all brilliant, but the value proposition is different, outsourcing versus offshoring. So outsourcing, just so you know, you basically say, I don't want to handle accounting. Someone else handle accounting, and someone does the accounting team, and it's elsewhere, and that, you know, has value, but they lack it's a contract, but they lack the control over what happens. There's turnover on that team. You don't know necessarily what system they're using. They produce an outcome, but it's not necessarily the best in class or necessarily aligned with how you run your organization, with your mission and values. That's extremely important also, when marketing or

customer support, who's answering your phone, are they answering everybody else's phone too? Do they live and breathe your mission, or do they just memorize a script and you're hoping that they're reading from the right script on that day. Or if they're doing graphic design, are they sending out, you know, things for everyone, and are they uniquely yours? Or are they, are they just outsourced and working on a bunch of accounts? So the value proposition is different. It is lesser cost labor on an outsourcing model, but you have variable quality. You lose control over your brand, and you have some risk in their turnover, their retention and equality. It is a cheaper labor model. It is clear. It's, you know, often in India, often in the Philippines, it's just you send it out to be outsourced, outsourced with agency in the US. However, you also are looking at things like branding agencies, marketing agencies, and their fees are much higher. We'll show you an example of that. But you again, lose control. They're working with other people. They're not only there for you, and offshoring, or in this case, near shoring because we're in Mexico, is a different model. You just give me the job description of a position that can be handled remotely, and you maintain control over that hiring process. We just recruit for you. We find good candidates based on your criteria, and then you're able to decide if you want that person. They're not just sitting on a bench, and we hope you like them. We're looking for all the right fit you are deciding whether you want to interview them, hire them, and if we do hire them on your behalf, they sit on an iBooks. We take all the risk in Mexico as the employer will take handle all the messy stuff, payroll benefits and all of the legalities of Mexico, but you have full control over that employee, what time they work, and what their what their branding and messaging is and what they do in their day. So the model is much more control. And as you know, in senior living and in age tech, that's extremely important. So just just to have you understand the model, this is just resource for you send to the one pager earlier. If someone is you're talking to, says, Hey, okay, I'm interested. I have an open position. You could send this to them. It's just also indeed sending them an email or give me their name and I'll contact them. You don't have to do any of this, but sometimes people want the resource, and hey, go talk to Sarah. Here's her one pager. Great. You don't have to. This is just a resource if you want it. Same thing for brochure again, you don't have to answer questions about menthol. You can just refer them to me, but if you want to, they a lot of times. The first question is, what kind of roles do they fill? And on the bottom right of this, you'll see we have everything from sales and marketing, human resources, finance it, anything that's remote. So not your frontline caregivers. We're not doing immigration, so not your nurses, not your CNAs, but if they can be managed remotely, they can be managed here, and we can provide that service. We just need to recruit for them. There's a reason why we're in Guadalajara. There's a great feeder of universities and talent, and there's a lot of universities with technical talent and sophisticated employees. It's considered the Silicon Valley of Mexico. So there's a lot of engineering talent. There's beautiful design schools, so a lot of marketing and design talent accounting. So Deloitte is down here. We have, actually in our same building, we and we've pulled several because they love the mission that we're on in senior living, they prefer to start to work for organizations that are culturally aligned and missionally aligned. So this is just a resource, so you see the type of positions, but keep in mind, it's any role that's remote. Just going to send this to you as a resource. The whole point of this call today is not teach you so much about mezcal, but gets you to feel a little bit better about what resources you have at your fingertips, if you want to talk more about it. And so the we put a couple of client studies in here. One, for instance, is, how do you manage a remote employee, and what is the quality of the work that happens when you hire someone you know that is on your team as a as opposed to an agency. And so for this example, this is red devr. It's a virtual reality program that works within Senior Living and beyond. It's an age tech startup. And just give you a tip of the type of close rate and success rate that they had when they were controlling their own employee, and with one of our employees that they hired, same thing for senior living. Atlas, Senior Living is always a great example. Met them at ASHA. They said, We have a marketing group that manages our web

hosting and our graphic design and our content, and this is an agency that we use. We don't need help. I said, Okay, why don't you just give me the sow and I'll take it and see what kind of roles you could do. You could use, if we recruited for them, to bring this in house, so that agency doesn't cost you as much and so you don't lose control. And within a week, they we gave a proposal of the types of roles we hadn't even started recruiting, and they canceled their agency. I said, Okay, well, that's a little bit of pressure, but we'll do it. We'll go recruit. We recruited. We found amazing candidates from incredible talent sources, and they have a team that immediately saw results better than agency, with a cost a fraction of the cost than agency. So we want to make sure you aren't feeling a part of what we're doing here. We're not going to bombard you once a month, we're going to send you an email. No Emmy's on this call, and she's going to be the Community Coordinator for this. If you need anything or have questions, you can surely reach out. You cannot talk to us ever, and just send us the email or name and we'll follow up. This is can be as high touch or as low touch as you want it, but the newsletter is pretty fun. Every month we produce it, we show you a lot of things that are happening within the community. We share a lot about the culture in Mexico, about the holidays and experiences and what we celebrate. We also share anyone who comes down, the employees that are meet with their teams, or the clients that come down, and we share stories around that, or new employees and their life story. We really get to know the community from the US side and the Mexico side, and talk about doing work within remote teams, tips and tricks on how to manage remotely, build culture remotely. It's helpful, and you don't ever have to read it. But if you want to just keep it top of mind, what we're doing and how we're doing it, we're going to start to send this to anybody who still wants to participate after this call. So the get to know you document is every new employee that start. We want to know their story, what they're passionate about, what they do. So you can look at this in the newsletter. It's everything, yeah, from their food and the favorite place they traveled, but it's getting to know what drives them and motivates them to join mez PAL and their professional goals. So your see the story. We build community for our employees here, and we want you to just see what we do again, no pressure at all to do anything with this information other than feel connected to what we're doing and feel proud. I don't know about you, but I don't refer to just anybody. I have to know they're going to be handled well, and I have to know they're going to be cared for and that it's valuable to them, or it's my name out there, and I've chosen each of you for the respect you have in your own communities. So I want you to know that you're going to be treated well, and your clients that you refer over, or friends family that are referring over that where they're in good hands. The monthly events that we have, we have yoga classes, professional development courses. We really are helping with retention of these employees by building community for the employees so they feel connected and supported by mezcal, but are that much more connected to their client and stay on the mission that their clients on. And it can be stressful with not then closed being an accountant or controller, senior controller stressed, and we don't want the stress of the job to be only dependent on the client's ability to create community and connectedness. So we're helping. We're just adding an extra layer of support and enthusiasm so they want to keep working for their clients, and we help with retention. Our retention rates are extremely

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Sarah Thomas 16:46

better, improved than the clients based base rates, we added additional benefits, discounts everywhere for academics and professional development to everything like flows and food and service delivery, all dimensions of wellness. If you know me, I'm an occupational therapist, I really care about the people that we're working with, both clients and community of employees, and so all dimensions of wellness are being brought into their benefits so that they

feel truly valued, because most outsourcing or offshoring is about cheap labor, and that's extremely insulting to talented individuals who happen to live in a lower cost area, like Mexico, that we can get exceptionally talented, experienced and well educated individuals, but they don't want to hear that they were hired because they were cheap labor. That's not it. The way they were valued for who they are. They're continuing to build value around the community that they're in, and they're committed to the people and the teams that they're working with. So you have all of the resources to look at if you feel like it. The only thing that we're going to be sending to you is once a month, an email, so that you feel connected to what we're doing. And with that, we're going to be connecting you to the newsletter so you can see it. We're going to have various events. And we do have various events throughout the year. We host team dinner, group dinner, anything that's in the US, around a conference I may be at. If you are also there, you're welcome to join. We host a quarterly immersion trip. I'm going to show you a video of the last one. It's short, but you can, you can hear it, and if you hold on one second, because we have good old Steven Johnson is joining us, but I'll let him just join for Dante. So you know what we'll do is, I'll send you the one pager. I'll send you this deck. So you have the one pager, you have a newsletter as a sample. You have the case studies. If you want to dive deeper, all you need to do is just recognize anybody that has any challenges, turnover, any challenges of an open position that might be remote, and all you need to do is make an intro. So please don't feel like this is, you know, too much of a heavy lift. It really isn't. We just had recognized some people didn't necessarily know the talking points and wanted them. And so if you want to dive deeper, you have these resources. The immersion trips that we have are quarterly. We have a list of prospects that several of you have already sent us for people who are interested in hiring with us, but once they have a position, and they might not, right now, and these immersion trips are they, they have an opt in list, and we send them about quarterly to say, Would you like to come down for this immersion trip and learn more about mezcal, some of our current clients Who hired fully remotely, and have not actually come down yet, but have a team. They just have not made it down. And some prospects are just interested in learning more about the business they come down. And this event is a three day, highly curated event. Noemi is with me on on this, and she is building this community where you are all involved, but she's also a big part of this immersion trip. It's fully dedicated to cultural immersion, to learn around the culture and the people doing business in Mexico, and really how beautiful and welcoming the spaces and also how safe it is. So if you talk to someone in there, I don't know, I hear this crime in Mexico. Okay, we bring them only places that feel and are safe and reputable and recognizable. People enjoy nice meals. Learn about the culture. They come and learn about doing business, what it's like to work with Mezcal. They meet current employees. They get to interview anyone if they have people in process and they'd like to meet them in person. If they've just hired a team, they get to meet their team and work with their team, and we build out meetings for them, but it's a highly curated event, so that people really feel comfortable with working in Mexico and with the culture and with the purpose that we're set out and how we can help from a business perspective. So I'm just going to show you this immersion trip video. It's short, but it's one of the last ones. You'll see some recognized names that we won't post this publicly, but I've asked that I could at least show this group. It's a fun trip, but this is when you give the invite to this, which you now will and you're welcome to join whenever you have time or would like to come. You can use this as a tool also, if you're talking to someone who's a little apprehensive, if they want to just talk to me, and that's enough, fine, if they want to come down, you can add them to the list and invite them to The immersion trip. And so This is This May I

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Sarah Thomas 23:00

uh. So as you can see, we have a little bit of fun, but the the whole point of that trip is we have them come and they stay in a familiar brand of a hotel that we tour them in Old Town, Guadalajara, see the Cathedral Square, look at the culture of the of the area. Bring them to a nice dinner that's traditional Mexican restaurant, and come into the office, meet current employees, learn about doing business in Guadalajara and then take them to this town of tequila. And so we always get questions about the Mezcal name. It is mezcal, the spirit and talent in one. And it is because the spirit of Mezcal is really the agave cultivation in this area in the state of elisco, and this an hour from the town of Guadalajara, is the town of tequila, and there is a lot in this area around the culture, medicinally, traditionally, ceremonially, and culturally around the spirit. So even if you don't drink, we've had people come on this trip, and it looks like they invited a lot of food and alcohol, but some don't drink. But to learn about the culture of this cultivation and the ceremonial value around it is also a neat experience for people, and they come to the office and meet with, you know, meet with employees, and there's some business as well, for sure, but the ability to immerse in culture and the area feel safe and also feel connected to the community, is very important. So it's the sales tool. So I'm telling you about it because it is a tool for you. If you start to talk to anyone and they're not sure about Mexico, they could always be added to this list and be invited, and you will, as well be invited if you'd like to join. So I want to make sure that I'm mindful of time. We only have five minutes left, I'm going to have Noemi after this. She has prepared this deck that she'll send to so you have the resources. You can also, as soon as she emails you, opt out and say I'm not interested, and I won't be offended. But if you would like to participate just in this small community, we are going to keep it with these influencers in this community, so we can build community with you and just send you updated information and tools for you to have these conversations. If you'd like to continue to participate, we'll get you the agreement so that you know legitimately, we're going to be sending you a bonus check when you do refer to us, and we're happy to do that. After someone is hired with anybody within the role they need to, I believe it's they stay 90 days, and then you'll get the check in the mail. So as long as it's a good fit and a client stays on, then we'll be, we'll be sending you a check to support that. We also hope to just have you interested in how we're doing and where and how you can participate. So we hope you join the community, but again, no pressure. Just wanted to introduce you more to where we're at and our value proposition. I can answer any questions for anybody, but we'll also just send information to you, and if you have any questions individually, feel free to follow up with me after but thank you for joining today, and if there are any questions, I'll take any or good for now. Good. Well, thank you. Thank you so much for joining me today. And we'll be sending this out to this group and the two others who were either later or couldn't make it. And I really look forward to hopefully working more closely with you and as you're out there, if we can have conversation together and help people solve their talent issues and build their teams, I'd love to help to do that together. So thank you for joining us today and also for participating in this program. Thank you, Sarah, great. Thanks. Everyone. Follow me. Nice to see you. Thanks. Sarah, Bye, Bye, Bye,