The Q Framework:
How will customers buy from you?
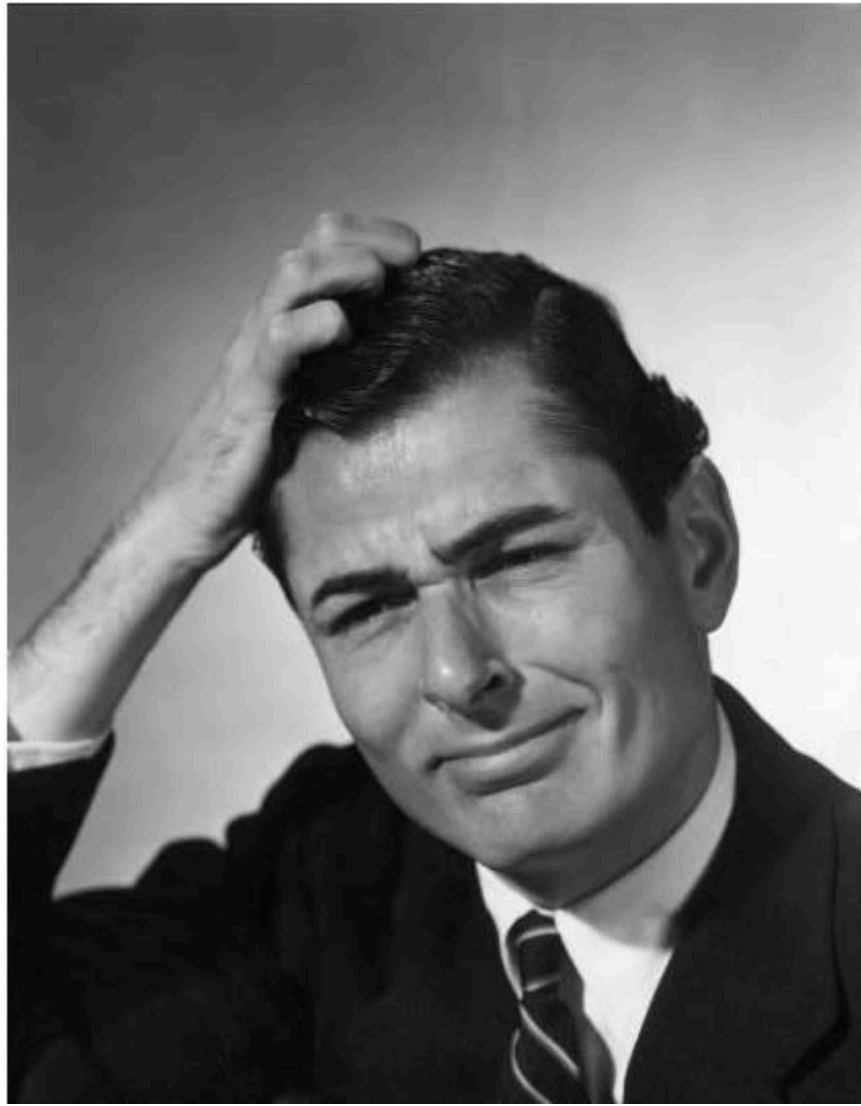
How ?
(Plan)

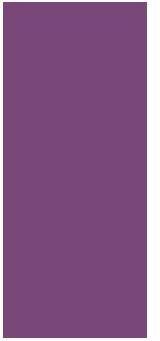Implementation Plan

+ The Problem…

+ Confused people don't buy.

You're a risk to your customer.

You're a problem waiting to happen.
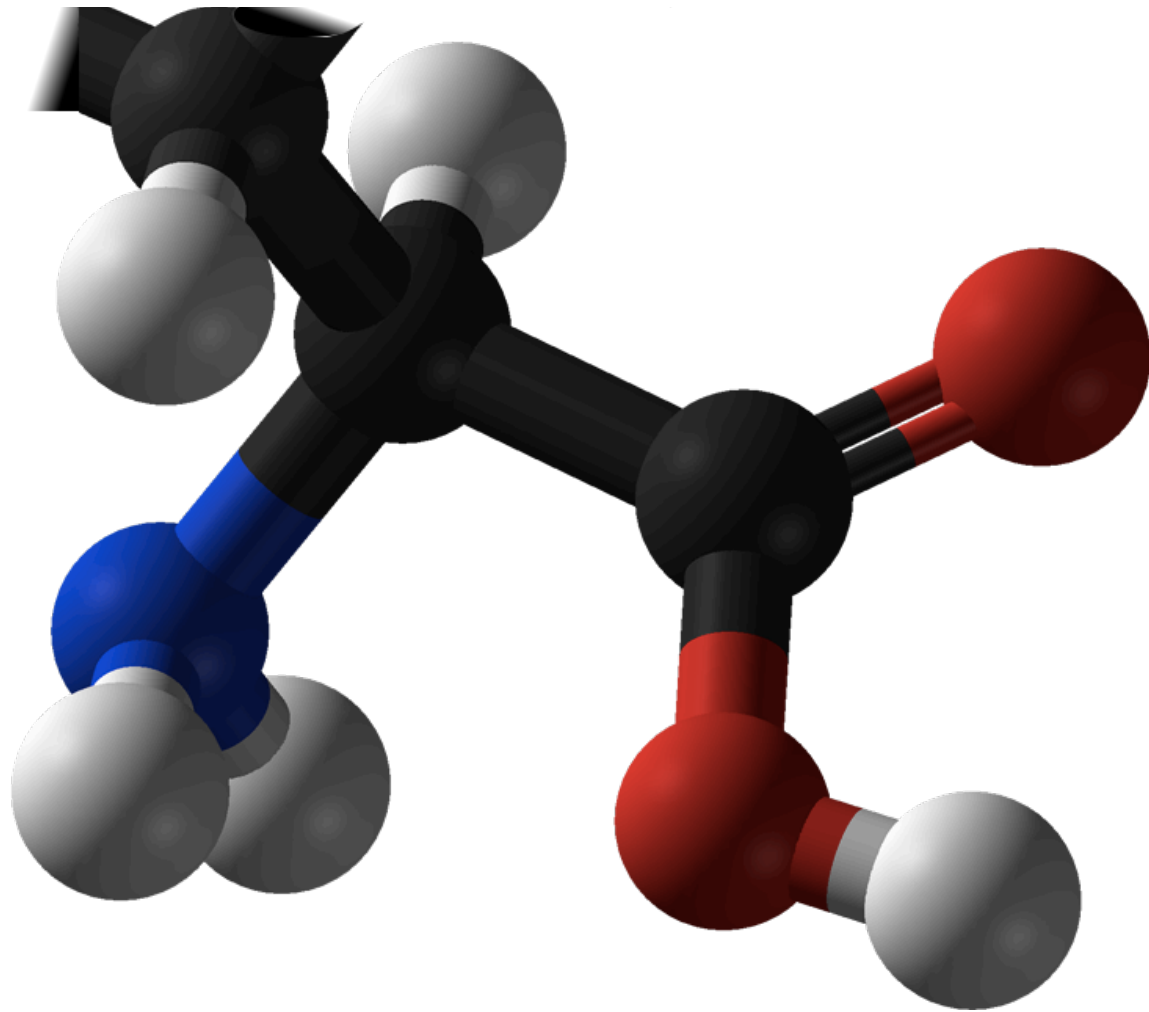
They can't trust you.

The Opportunity…

Small now. Grow later.

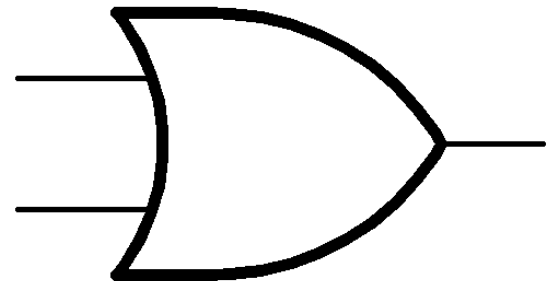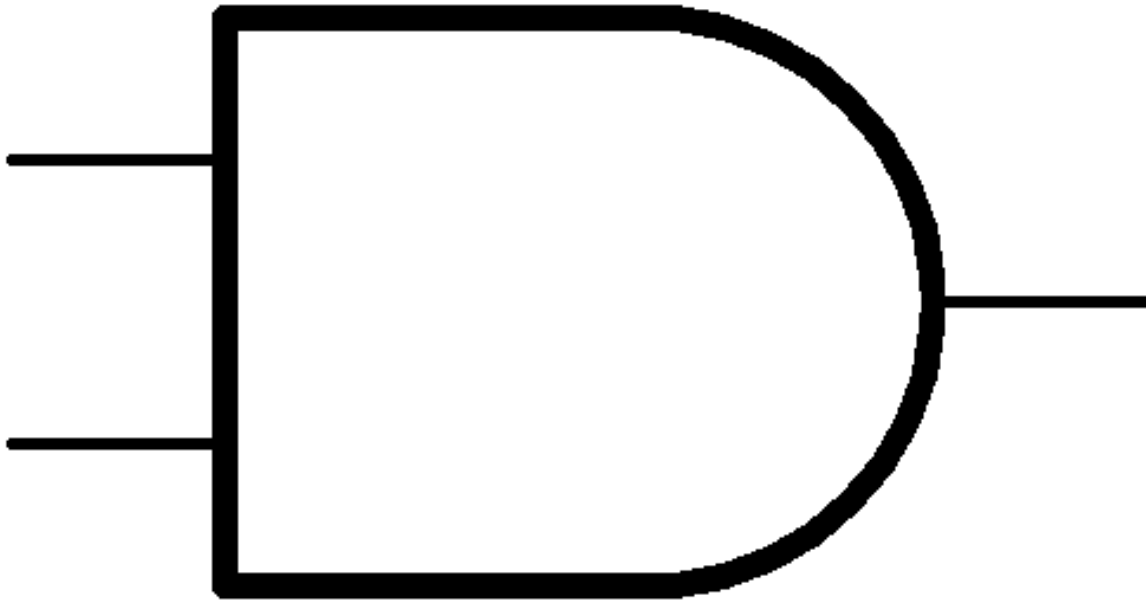You have a chance to be different.

The Principles

Think "AND" not "OR."

"Send me a proposal…"

Build a work plan.

Give your customers a view of the future.

"What happens next?"

- The first minute?

- The first hour?

- The first day day?

- The first week?

- The first month?

- The first quarter?

- The first year?

Milestones

December 1, 2015
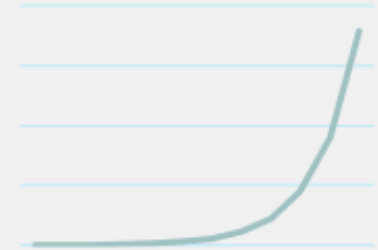
Pilot Launch & Training

December 15, 2015
Pilot Checkpoint

March 1, 2016
Pilot Retrospective

November 16, 2015
Soft Pilot Launch & Training

January 11, 2016
Pilot Checkpoint

December 15, 2015
Integrations Kick-Off
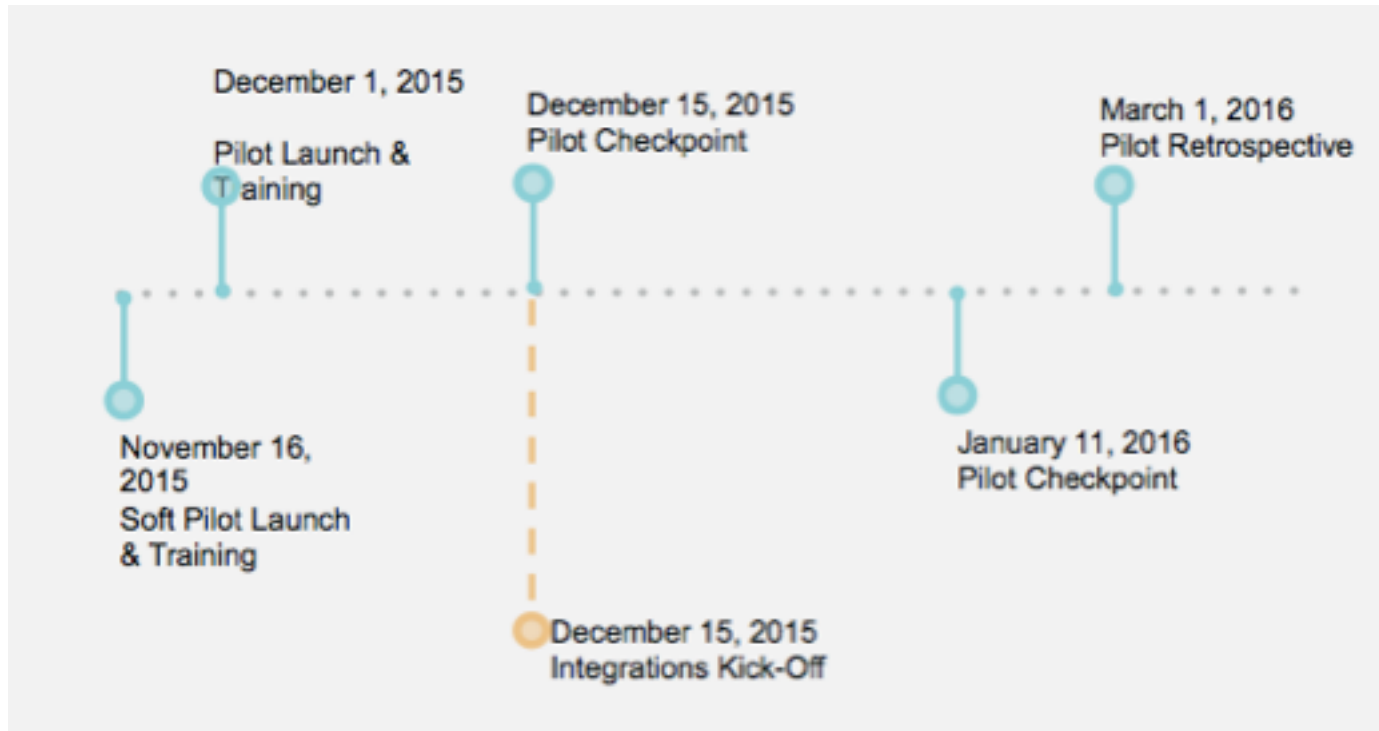
|	Project Initiation	Iterative Configuration Process	Rollout
Timeline	1 week prior to kick off	2 weeks post kickoff	1 week
First Republic Team	• Project Sponsor • Business SMEs	• Project Sponsor • IT Lead • Branding Lead • Compliance	• Project Sponsor • IT Lead • Business SMEs • Compliance
Blend Team	• Account Manager • Project Manager • Product	• Account Manager • Project Manager • Implementation Engineer	• Account Manager • Project Manager
Tasks	• Process Discovery • Assembling Team • Project Planning • Ends with Kickoff	• Branding • Configuration • Integration • Application Reviews	• End User Training • Application Launch • Ongoing Support • Training

Deployment Expansion Plan – Soft Pilot

Phase	Goals	Time Horizon	Minimum Cumulative Loan Count
Implementation	❑ Stand up production ❑ 4 borrowers invited ❑ First connection is made (paychecks, w2, taxes, etc) ❑ Training pilot RMs and Loan Specialists	2 weeks post-contract signing (10/28 – 11/16)	2 loans in Blend
Early Expansion	❑ 5 pilot RMs and all related Loan Specialists in San Francisco are using Blend for Employee Loans ❑ Each RM creates at least 2 Blend Loan (10+ total)	2 weeks (11/16 – 12/1) *Thanksgiving is 11/26	12 loans in Blend

+ Now what?
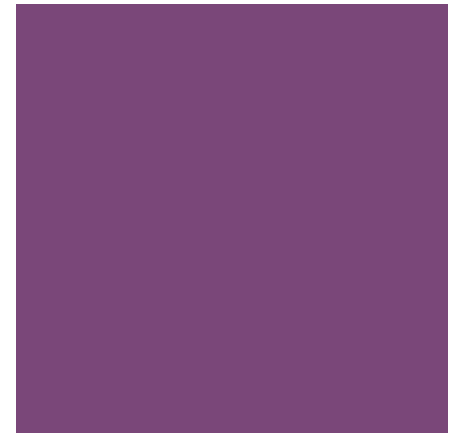
+ THE TOOLS YOU NEED

THE STARTUP SELLING 7x1 WORKSHEET

When a customer says yes, what do you do on...

...the first **minute**	
...the first **hour**	
...the first **day**	
...the first **week**	
...the first **month**	
...the first **quarter**	
...the first **year**	

Implementation Plan Worksheet

When a customer says yes, what do you do on...

Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7

Week 1
Week 2
Week 2