SITUATION OVERVIEW

The dental supply market remains dominated by an outdated customer representative model that is perpetuating a "moving price" culture that frustrates dental professionals, creates dependency, and drives up the cost of supplies. Supply Clinic was founded to simplify the supply management process and introduces modern supply chain best practices by allowing dental professionals to easily compare and save on the brands they know and trust.

The financial and operational impact of the COVID-19 pandemic is also driving dental professionals to consider new supply partners. After suffering a multi-month shut-down, practices need to save money wherever possible. They will not compromise on the quality products – but they are willing to use new vendors to capture savings. Additionally, current suppliers are not able to serve the PPE needs of the market, leading dental professionals to look for new sources.

Supply Clinic is perfectly positioned to capture new business in this environment. Its platform helps practices find the best price on trusted/authorized products, and its customer service team can help practices track down essential products that are in high demand.

CURRENT POSITIONING

Market research reveals there is no leader in the dental supply online purchasing model. The work Supply Clinic has done to date has positioned it to capture immediate growth opportunity that will lead to long-term success:

1. Platform aligns with stated market needs:
   a. Find the products dental professionals know and trust
   b. Find the lowest/close to lowest price quickly (less time comparison shopping)
   c. Manage fewer vendors
   d. Help managing sellers (availability, shipping turnaround, etc)

2. The market is able to articulate its value proposition:
   a. "I'm surprised every time I order. We used to order from Patterson and 3M but it was so expensive."
   b. "It was easy to use. You can compare different vendors and order the lowest price."
   c. "I was able to save $ on half"
   d. "I pulled up my old list and copy pasted in Supply Clinic. If it matched, I ordered it."
   e. "They are my partner in working with suppliers – my first line of defense. An order was canceled by a supplier and they helped me cancel and get my money back."
   f. "We use the site independently but appreciate having access to Kelly."
   g. "I like my history is there for simple reorder."

3. There is an enormous opportunity to up-sell/cross-sell existing customers and re-activate past customers

4. The relational sales channel is not being fully utilized. Supply Clinic thought leadership and proof-of-performance content is critical to acquiring new clients. Leveraging marketing automations and up-sell/cross-sell opportunities will accelerate customer journey, increase number of orders and average amount per order.

5. The Supply Clinic inside sales and customer service team is recently in place and able to execute intended job functions (job functions derailed for months during COVID).

6. Leveraging marketing automations and up-sell/cross-sell opportunities will accelerate customer journey, increase number of orders and rage amount per order.

2021 GOAL: 2X = 10X

By optimizing the transactional sales channel, introducing the relational channel, and supporting the sales/customer service team with smart automations, it is an attainable goal to double key metrics in 2021. At the same time, these efficiencies should lower the costs of new customer acquisitions and the cost to serve customers. The 2021 goal is 2X growth = 10X revenue.

Benchmarks:

- Dental Accounts: 9698   2021 Goal: 20,000
- Active Accounts: 12%   2021 Goal: 25%
- Average Monthly Revenue: $400   2021 Goal: $800 (20% of average mo. supply spending)
- CPA: $130   2021 Goal: $97.5 (25% reduction)
- Cost to Serve (salaries/#clients)   2021 Goal: $X (25% reduction)
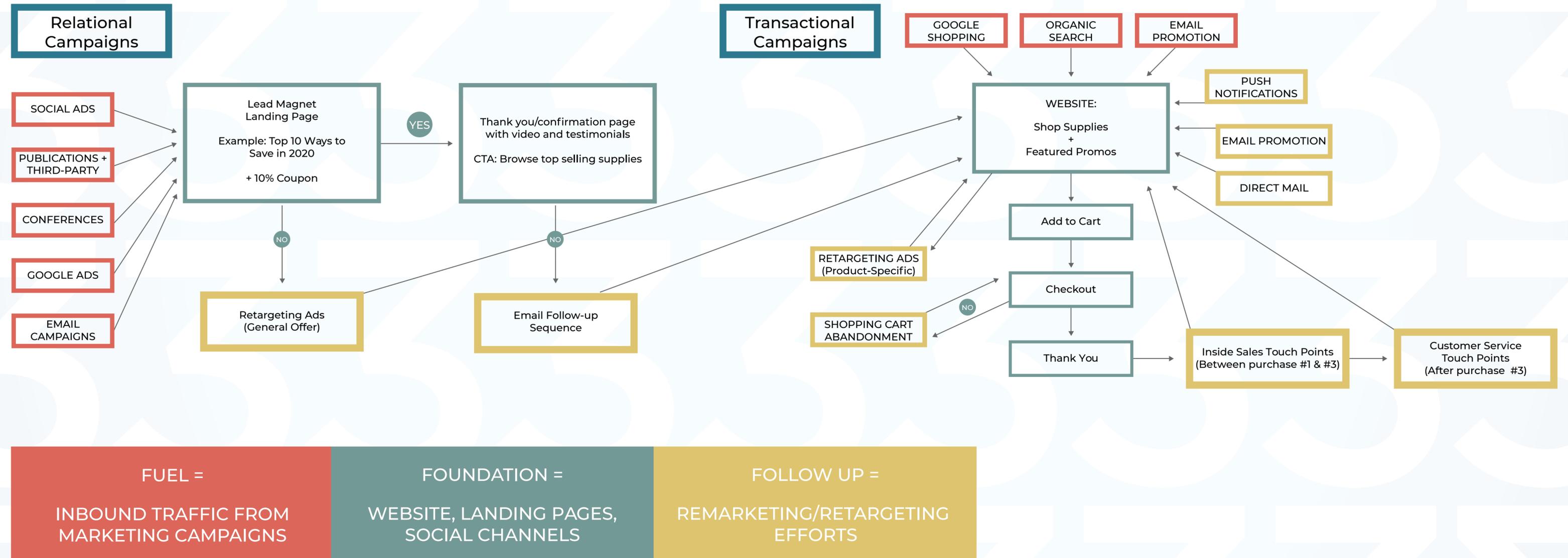
MARKETING FOUNDATION

Supply Clinic does not have strong brand awareness among dental professionals in general – and even its current accounts do not have a strong understanding of its value proposition as evidenced by the fact that the average monthly order amount is only 10% of a practice's average monthly spend. Additionally, only 10% of practices that make a first purchase at Supply Clinic convert to a 3rd Purchase – the point at which the account moves from inside sales to the customer service team.

Root3 will be focused on the following metrics:

» Conversion rate from signup to first purchase: 70%
» Conversion rate from 1st purchase to 2nd purchase: 20-35% → Target: 50%
» Conversion rate from 2nd purchase to 3rd purchase: 50-60% → Target: 75%
» Conversation rate from signup to 3rd purchase: 10% → Target: 30%

OPTIMIZING SALES CHANNELS

Root3 has defined 3 critical sales channels for Supply Clinic and provided recommendations to optimize:
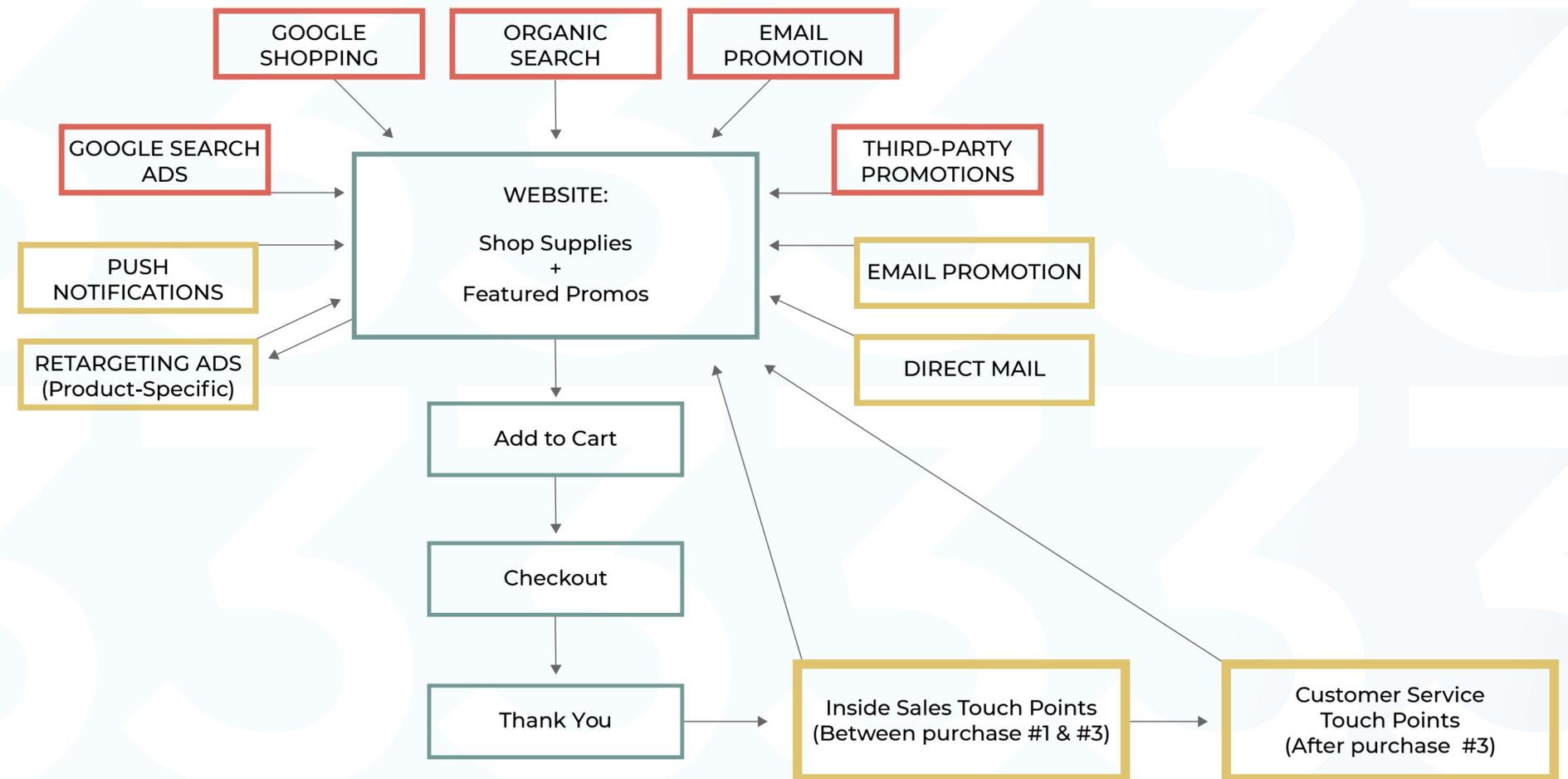
Relational Campaigns

SOCIAL ADS

PUBLICATIONS + THIRD-PARTY

CONFERENCES

GOOGLE ADS

EMAIL CAMPAIGNS

Lead Magnet Landing Page

Example: Top 10 Ways to Save in 2020

+ 10% Coupon

YES

Thank you/confirmation page with video and testimonials

CTA: Browse top selling supplies

NO

Retargeting Ads (General Offer)

NO

Email Follow-up Sequence

Transactional Campaigns

GOOGLE SHOPPING

ORGANIC SEARCH

EMAIL PROMOTION

WEBSITE:

Shop Supplies
+
Featured Promos

PUSH NOTIFICATIONS

EMAIL PROMOTION

DIRECT MAIL

Add to Cart

RETARGETING ADS (Product-Specific)

Checkout

SHOPPING CART ABANDONMENT

NO

Thank You

Inside Sales Touch Points (Between purchase #1 & #3)

Customer Service Touch Points (After purchase #3)

FUEL =	FOUNDATION =	FOLLOW UP =
INBOUND TRAFFIC FROM MARKETING CAMPAIGNS	WEBSITE, LANDING PAGES, SOCIAL CHANNELS	REMARKETING/RETARGETING EFFORTS

1. Transactional: Supply Clinic needs to win search where dental professionals search for a hard-to-find product such as PPE, or a product that has become too expensive/or been discontinued from their current supply partners. This sales channel drives a price-motivated shopper looking for a point solution. It is critical for attracting new facilities but must be supported with additional content and touch points to convert the single transaction buyer to an ongoing Supply Clinic customer purchasing a minimum of 20% of its practice supplies.

» Incorporate and optimize "You May Also Like" and "Featured Product" promotions into:
  • Enhanced product pages
  • Shopping cart, checkout and order confirmation pages
  • Transactional emails (order confirmations, shipping confirmations)

» Launch shopping cart abandonment email campaigns

» Optimize dynamic retargeting ad creative with the "WHY BUY" message

| GOOGLE SHOPPING | ORGANIC SEARCH | EMAIL PROMOTION |

| GOOGLE SEARCH ADS | | THIRD-PARTY PROMOTIONS |

WEBSITE:
Shop Supplies
+
Featured Promos

| PUSH NOTIFICATIONS | | EMAIL PROMOTION |

| RETARGETING ADS (Product-Specific) | | DIRECT MAIL |

Add to Cart

Checkout

Thank You

Inside Sales Touch Points (Between purchase #1 & #3)

Customer Service Touch Points (After purchase #3)

| FUEL = | FOUNDATION = | FOLLOW UP = |
| INBOUND TRAFFIC FROM MARKETING CAMPAIGNS | WEBSITE, LANDING PAGES, SOCIAL CHANNELS | REMARKETING/RETARGETING EFFORTS |

OPTIMIZE USER EXPERIENCE

Utilizing research and best practices, Root3 will develop optimized wireframes and design new page templates that include updated messaging (text & visual), CTAs, and upsell + cross-sell opportunities. We will also work with Supply Clinic to test and implement potential third-party plug-ins to drive utilization w/o extensive development:

» Focus Pages:
- Home
- Product
- Sign up/Register
- Shopping cart
- Checkout
- Thank you/Confirmation
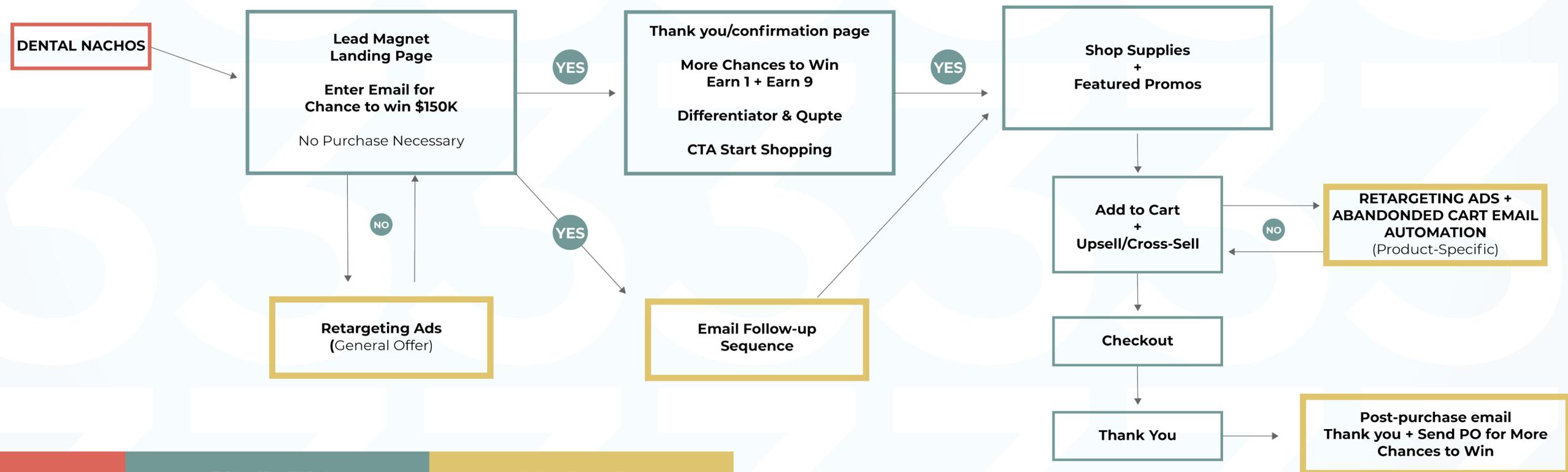- Relational landing pages

2. Relational: This channel builds brand awareness, differentiates from the competition, drives credibility, keeps the company top-of-mind, and ultimately leads to more long-term relationships (conversions). This channel utilizes thought leadership, case studies, client stories, company news, how-to video animations, etc.

» Priority Campaigns include:
- Re-engagement (Pre-COVID segment) – identify clients who stopped ordering during the initial shut down and haven't ordered since
- Increased utilization (COVID segment) – clients who continued to order during COVID (including PPE) and may have experienced issues with sellers

» Current assets / partnerships
- Dental Nachos advertising campaign

DENTAL NACHOS

Lead Magnet
Landing Page

Enter Email for
Chance to win $150K

No Purchase Necessary

YES

Thank you/confirmation page

More Chances to Win
Earn 1 + Earn 9

Differentiator & Qupte

CTA Start Shopping

YES

Shop Supplies
+
Featured Promos

NO

Retargeting Ads
(General Offer)

YES

Email Follow-up
Sequence

Add to Cart
+
Upsell/Cross-Sell

NO

RETARGETING ADS +
ABANDONDED CART EMAIL
AUTOMATION
(Product-Specific)

Checkout

Thank You

Post-purchase email
Thank you + Send PO for More
Chances to Win

FUEL =	FOUNDATION =	FOLLOW UP =
INBOUND TRAFFIC FROM MARKETING CAMPAIGNS	WEBSITE, LANDING PAGES, SOCIAL CHANNELS	REMARKETING/RETARGETING EFFORTS

- Thank You Video:
  - Asset for Dental Nachos advertising
  - Distributed to current/matched audiences on social channels
  - Increased utilization/goodwill from customer service team to current accounts
  - Re-engagement for accounts dormant for 3+ months
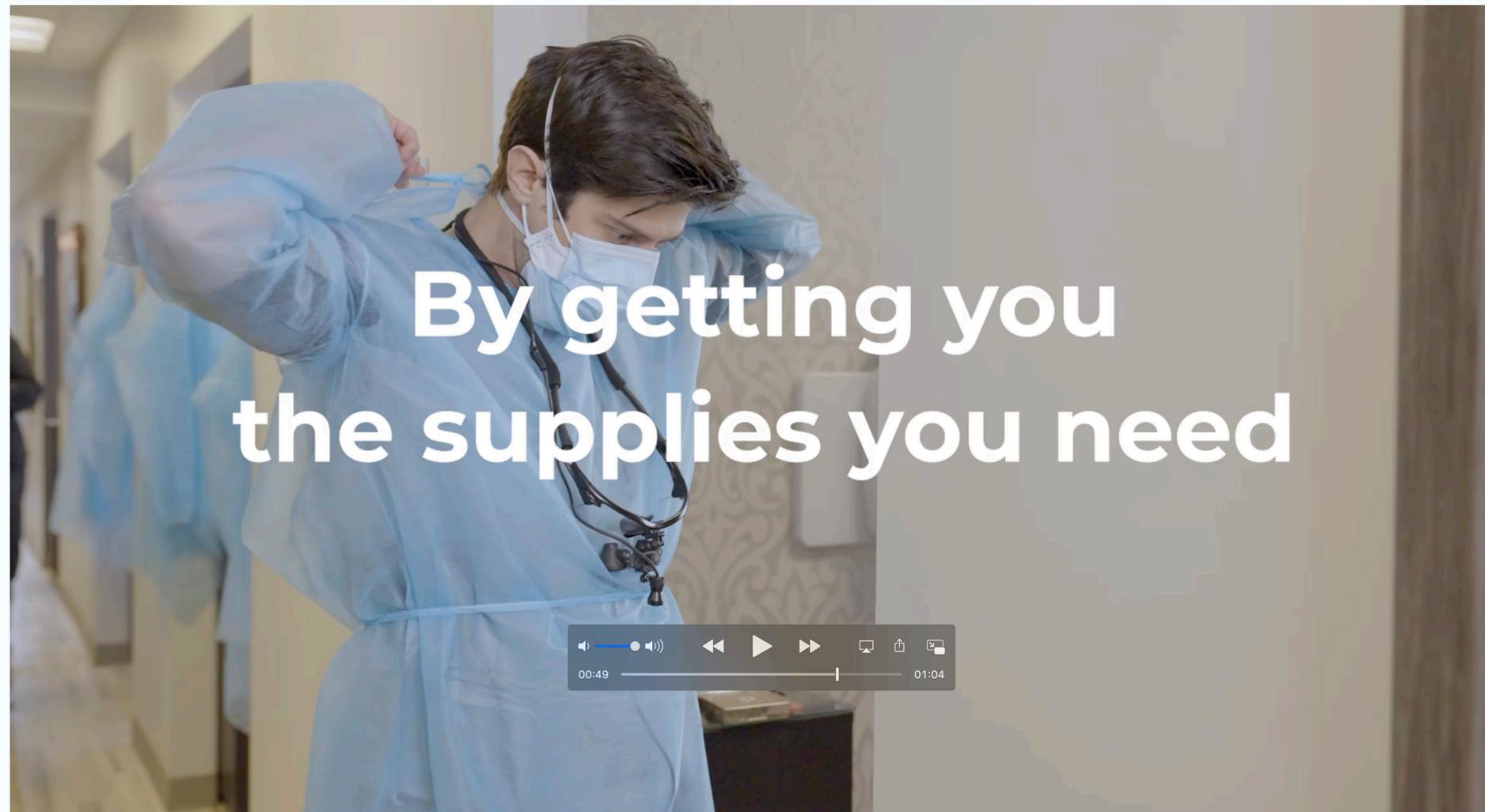
» Recommended [Content Calendar](#) – Email, Blog, Social. We will use a multi-channel, multi-touch strategy to distribute this content:

- Bi-weekly promotional email
- Weekly thought leadership/proof-of-performance content
- Bi-monthly newsletter
- Daily social posting

Where Customers are Active

Sponsorships/PR/Syndication

Email/Newsletter/Intranet · Social Media · Publications · Internal/External Meetings

Where Customers are Searching

User Search

Search Optimization · Search Marketing Advertising · Social Content

Website/Page

Retargeting

Calls-to-Action

Measure/Monitor

Lead Qualification & Nurturing

3. Sales/Customer Service Support/Cadences: Root3 will build three cadences to support the sales/customer service team. In addition to providing efficiencies, the data from these content interactions will drive utilization and intelligence for the SC team to utilize to drive interactions.

» New Customer Cadence: our goal is to create an efficient and informative new customer interaction that drives our intended customer behaviors with as little human interaction as possible. This goal of this new cadence is to help drive a new customer through to 3rd purchase in 90 days:

- Customer behavior goals:

    - Start every search at Supply Clinic

    - Purchase the majority of their supplies from Supply Clinic

    - Accelerate to 3rd purchase in 90 days or less

- Our vision of the new customer cadence:

    - Sign-up page supported with testimonials, proof-of-performance, infographic

    - Customer makes first purchase

    - Order confirmation page with Buy Box instructional animation and next steps

    - Automated email introducing support team with invitation (link) to schedule meeting

    - Order completion email (notifies Support Team) – how did we do simple survey with 2nd purchase incentive coupon (already in your new order)

    - Personal Call – goal: get to know your practice/help price compare on supply list

    - Supply Clinic follows practice on social

    - Automated email inviting to follow on social for promotions/best-practices

» Reengagement Cadence:

- Root3 will develop a quarterly re-engagement for customers who do not convert to 3rd purchase in 90 days – and for customers who have not purchased in 90+ days.   It is two emails designed to be very easy to respond to – and get customers engaged:

  - Click here for coupon

  - High-value thought leadership content

  - Inside Sales will follow up by phone with customers who re-engage

» Nurture Cadence:

- The ongoing content cadence is designed to keep customers engaged and teach them how to best use your platform to drive utilization.   (see attached content calendar)

MESSAGING AND BRANDING

As we work to get the Supply Clinic brand in front of more dental professionals, we need to make sure they understand what differentiates Supply Clinic from the competition. As part of this process we recommend productizing some of your differentiators to emphasize brand value and neutralize the competition:

» Position as a supply team member – not a seller / teach to start every search at SC

- Our technology does price comparison research so you don't have to
- Our technology and team manage sellers/shipping so you don't have to
- Our platform carries 85% of your supplies / most save money on 50% of their supplies

» Position as more than price savings/leverage dentist/business-owner POV. The ongoing content cadence is designed to keep customers engaged and teach them how to best use your platform to drive utilization.
See content calendar

- Save 33% on supplies
- Fighting for price transparency and customer service in dental supply market (rep mode/current last-minute ordering model drive up the price of supplies)
- Avoid unreliable sellers/ grey market supplies
- Lead through crisis – stay safe and open during COVID

» Position as modern solution

- Technology with support when you need it
- Branding your technology is critical to this initiative:
  - "Buy Box"
  - Seller Score ————— Seller Management Center
  - Cart Optimizer ————— Management Suite/Tools

30, 60, 90 DAY PLAN

» First 30 Days:
- Optimize transactional user experience
- Update top line messaging: "Compare and save on the brands you trust"
- Brand differentiators such as the "Buy Box"
- Optimize Dental Nachos campaign
- Launch Thank You (inspirational) campaign
- Customer utilization campaigns (Second Wave PPE)

» 30-60 Days:
- Launch relational content/strategic distribution strategy with thought leadership/nurture cadence:
- 2 thought leadership pieces
- 2 case studies

- Begin animation series of tech stack:
  - "Buy Box"
  - Optimizer
  - Seller Score
  - Shipment Management Center
  - Supply Chain Management Tools
- Launch new sales/customer service support strategies
  - First 90 days cadence: Emails, social, calling, animated videos for FAQs and utilization

» 60-90 Days:
- Complete animations and add into nurture/sales cadences/UX
- Launch re-engagement campaign/cadence
- Begin single order email/calling campaign

2021 GOALS

» Dental Accounts: 20,000

» Active Dental Accounts: 25%

» Average Monthly Value: $800

» CPA - $97.5

» Cost to Serve - TBD

KPIs

» Website traffic rate by sources

» Email/social engagement

» Conversion to cart/signup page

» Conversion rate from signup to first purchase: 70%

» Conversion rate from 1st purchase to 2nd purchase: 20-35% ➔ Target: 50%

» Conversion rate from 2nd purchase to 3rd purchase: 50-60% ➔ Target: 75%

» Conversation rate from signup to 3rd purchase: 10% ➔ Target: 30%

R3 EXECUTION BUDGET

» Approx. **$6500/mo.**

   » Strategic plan management/optimization
   » Ongoing marketing strategy
   » Marketing execution
   - Design/UX
   - Content development
   - Strategic distribution
      - Email
      - Social
      - PR
   - SEO/SEA support
   - CRM management

MARKETING SERVICES RETENTION AGREEMENT

This Marketing Services Retention Agreement ("Agreement") is entered as of November 25th, 2020 ("Effective Date") by and between Root3, LLC, an Illinois limited liability company also doing business as Root3 Marketing & Business Development ("Root3") with a place of business at 1643 N. Milwaukee Ave, 3rd Floor, Chicago, IL 60647 and Supply Clinic ("SC"), sometimes referred to individually as a "Party" or collectively as the "Parties".

RECITALS
WHEREAS the purpose of this Agreement is to establish legally binding terms and conditions for placing and accepting business engagements until otherwise terminated; and
WHEREAS Root3 has outlined the tactics, responsibilities, costs and goals for SC marketing efforts;
NOW THEREFORE, in consideration of the mutual promises contained herein and for other good and valuable consideration, the Parties hereto agree as follows:

Conditions of Engagement

1. **Confidential.** Root3 and its affiliates, contractors and partners agree at all times during the term of this Agreement to hold in strictest confidence, and not to use, except for the benefit of SC, or to disclose to any person, firm or company without written authorization of SC any Confidential Information of SC.

2. **Ownership/Assignment.** All deliverables, including but not limited to documents, pictures, video, digital files, code, and designs generated or provided by Root3 for SC are the property of SC and will be treated as SC work product.

3. **Work Invoicing and Payment Terms.** Root3 shall perform the work set forth in the plan, provided necessary feedback and approval from SC is received by Root3 in a timely manner. Root3 will invoice at end of month for work completed that month. Payment terms are NET30.

4. **Additional Expenses & Services.** Any additional work or expenses above and beyond the scope of the approved Plan will fall under a separate service agreement to be provided to and approved in writing (with email accepted) by SC.

5. **General.** This Agreement shall be construed and governed by the laws of the state of Illinois without rules regarding conflicts of law. If any provision of this Agreement is unenforceable, the Parties intend for that provision to be interpreted in the manner that most closely reflects the Parties' original intent, and all other provisions of the Agreement will remain unaffected.

6. **Agreement Modification;** This Agreement may only be modified, amended, or any rights under it waived, by a written document executed by the Parties.

In Witness Whereof, the Parties have executed this Agreement as of the Effective Date.

_____

Supply Clinic, Inc.

_____

Scott Christiansen, CEO
Root 3

3. SALES/CUSTOMER SERVICE SUPPORT/CADENCES

Do you have a big marketing need or opportunity?

Does it include complicated, and/or expensive products or services?

Are you targeting a niche market that is hard to reach, access and influence?

We capture that opportunity while providing growth and development along the way.

CLIENT EXPERIENCE

FINTECH

MACHINIFY

splash financial

OPENMARKETS

FINANCIAL

mb financial bank

Gibraltar
BUSINESS CAPITAL

SILVEUS
FINANCIAL™

◭ MACHINIFY

"I'd describe Root3 as our trust vectoring engine. They enabled us to do a vertical take off with one of the most coveted national accounts within weeks which would have otherwise taken over a year. And once airborne, Root3 has been helping us carefully calibrate our execution with great precision and effect. What makes Root3 lethal is their mastery of marketing-deal cycle."

TONY MIRANZ
COFOUNDER & PRESIDENT, MACHINIFY

CASE STUDY: ORIGINAL EQUIPMENT MANUFACTURER

PROBLEM

» European medical equipment manufacturer Serres is #1 in the world in the surgical fluid space, but unknown in the US.

» Serres sales messaging fell flat on US audience that only wanted to know what they had achieved here.

» Serres sales messaging was not differentiated by surgical facilities and hospitals

» Serres did not understand how to navigate the multiple decision maker reality of US health systems

OPPORTUNITY

» Root3 conducted research and developed a go-to-marketstrategy in the U.S. that led to the company's most successful new market launch.

» 30% of leads turned to sales qualified leads in first 60 days and included Mayo Clinic
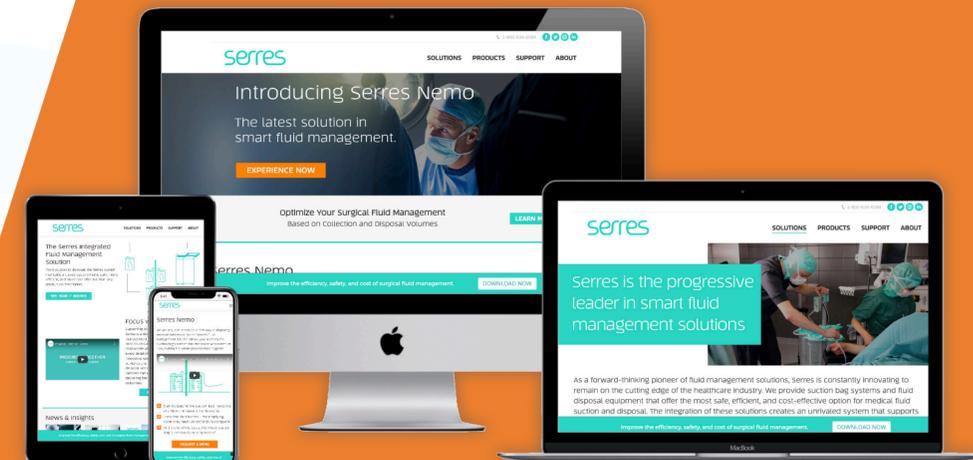
"This launch was by far the most productive and beneficial I've been a part of in all my years of device sales. The quality of conversations and opportunities was exciting to see and I'm looking forward to seeing them develop. Also, and most importantly, the Root3 team is amazing. They absolutely killed it with everything they did to have us prepared for launch. Thank you all for your support and helping us stand out in the market."
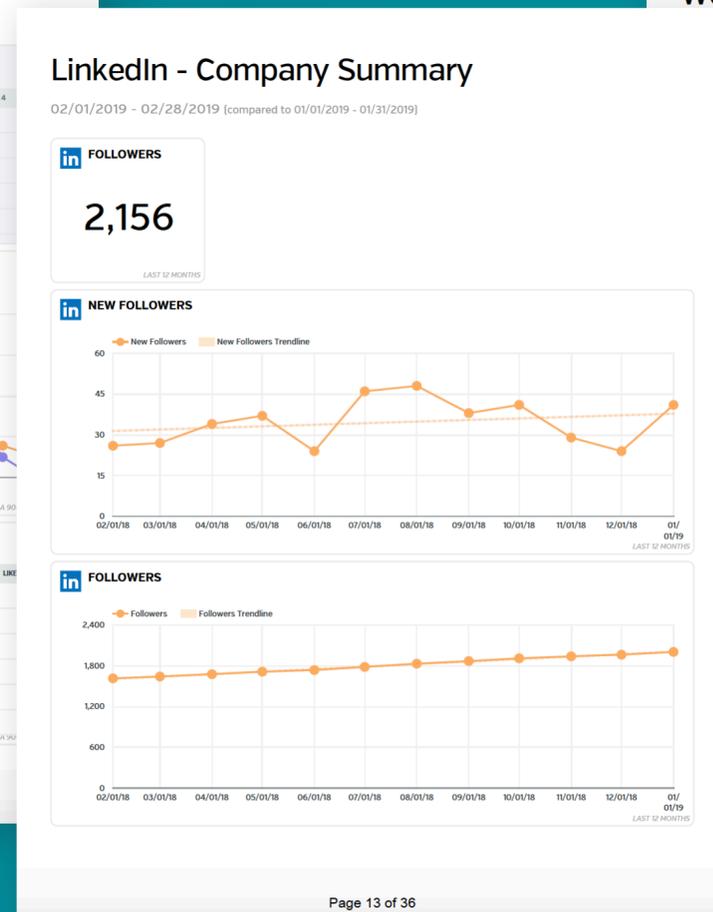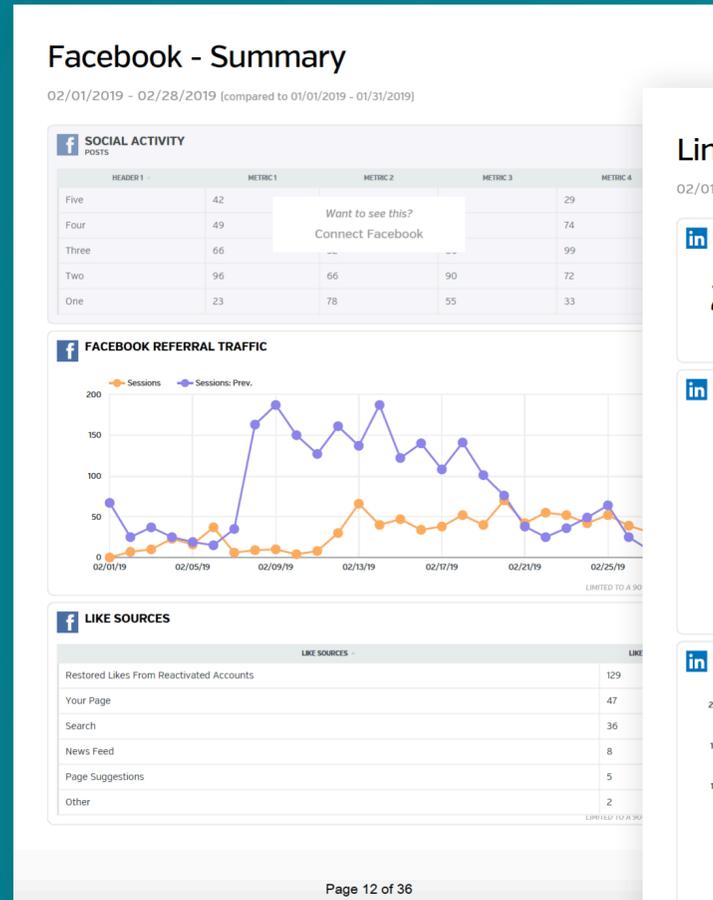
JASON PFEIFFER
US SALES DIRECTOR, SERRES

MARKETING EFFICIENCY & SALES INTEGRATION SPECIALISTS

Our process, technology, and automations fix where 80% of marketing value is lost

Strategize
- Team meetings
- Team communication
- Calendar development

Identify
- Database management
- List building
- List segmentation
- Lead scoring

Influence

Rich Content
- Educational content
- Case studies/success stories
- Targeted emails
- Newsletters

Channels
- Digital advertising
- SEO/reputation management
- Social media
- Public/media relations

Calls-to-Action

Qualify
- Database management
- List building
- Manage calling team
- Liaise with BD team
- CRM documentation

Distribute
- Database management
- Liaise with BD team
- CRM documentation

Learn & Optimize
- Reporting & analytics
- Liaise with BD team

CLOSE

Foundation
- Website
- Social pages
- Collateral
- Target personas
- Key messaging

Nurture
- Automated emails
- Personalized cadences
- Retargeting ads
- Newsletters
- Social media

REPORTING & OPTIMIZATION TECHONOLOGY

Companies that excel at lead nurturing generate 50% more sales-ready leads at a 33% lower cost – Marketo.
We provide fractional CRM administration.

FULL FOUNDATIONAL SERVICES

RESEARCH & STRATEGY

» Opportunity Assessments
» Competitive/Comparable Intelligence
» Digital Footprint Analysis
» Quant/Qual Research
» Message Development
» Strategic Plan Development

DESIGN, WEB, DATABASE, CRM

» Brand Development/ Rebranding
» Web Development/UX
» Design, Photography, Video, Animation
» Database Development/ Segmentation
» Automation Configuration/ Management

BD/SALES

» Sales Process Digital Transformation
» Persona Development
» Engagement & Prioritization Strategy
» Sales CRM Setup/ Configuration/Management
» Email Cadences & Call Scripting

FULL EXECUTIONAL SERVICES

MARKETING

- » Inbound & Outbound
- » Content & Social
- » SEO/SEA
- » Marketing & Email Automation
- » Web Development & Management
- » Lead Generation & CRO
- » Public & Media relations
- » Events

BD/SALES

- » Email/Phone Sales Cadences
- » Lead Qualification Calling / Appointment Setting
- » Marketing CRM Management
- » Sales CRM Management
- » Database Management

30, 60, 90 TACTICS/TIMELINE

Kick Off Meeting

» Assess sales and marketing tech stack
» Asses UX
» Set benchmarks
» Set goals

Message Research

» Identify Zeconomy IDI personas
» Develop IDI Script/email invite
» Select Zeconomy IDI candidates
» Select Root3 IDI candidates
» Begin interviews

Message Development

» Continue interviews
» Begin competitive intelligence
» Synthesize findings
» Present initial findings

Message Recommendations

» Present final messaging recommendations
» Develop website wireframe recommendations
» Begin new capabilities presentation for supplier/ service provider

Prior to Phase 1 → **Phase 1 – First 30 Days** → **Phase 2 – 30-60 Days** → **Phase 3 – 60-90 Days**

Continuous Support

Root3 will work with ZECONOMY's leadership and marketing resources to understand and amplify company resources, growth goals, messaging, and target decision maker characteristics throughout the whole timeline.

Marketing Foundation

» Select marketing CRM
» Select sales CRM (likely the same)
» Identify target database (1 enterprise client supplier list)
  a. Identify additional titles/ missing fields
» Write email cadence
» Claim/set-up social
» Begin campaign page

Marketing Development

» Complete database enhancement/segmentation
» Configure marketing CRM
» Present sales CRM configuration plan
» Complete campaign page
» Hit "send" on first email/social

Marketing Execution

» Continue email cadence
» Begin lead qualification calling (appt. setting)
» Identify next campaign(s)
» Develop media list
» Develop strategic communications calendar for:
  a. Campaigns
  b. Nurturing
  c. Media