IMCI+ Alliance – New Member Onboarding Checklist & Process Manual

(From Registration to Mentoring & Sales Supervision)

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Zurich, 11 October 2025 nmp

1. Objective

This checklist provides a structured roadmap for the **onboarding, orientation, and integration** of new members into the **IMCI+**.

Its goal is to ensure that every new Associate, Partner, or Head Zone enters the organization in a **coordinated, informed, and productive** manner, reflecting the IMCI+ values of **professionalism, transparency, and excellence**.

The process is designed to:

- Establish clear expectations and performance standards.
- Build a strong understanding of IMCI+'s structure, programs, and methodologies.
- Ensure early alignment with **Vision 2025** and the **MFLP/XL operational models**.
- Facilitate active engagement and measurable contributions to the global sales pipeline.

2. Process Overview

Stage	Phase	Responsible	Timeline
1	Application / Registration, Verification & Final Acceptance	HQ / Alliance Team	Week 1–4
2	Legal & Administrative Setup (Agreements, Compliance, Invoice, Code of Conduct, NCNDA)	HQ / Member	Week 5–6
3	Orientation & Kick-Off	HQ / Head Zone	Within 1 Quarter
4	Integration into Sales Pipeline	Head Zone / Member	After Incorporation
5	Mentoring & Coaching	Head Zone / Senior Associate	Continuous (First 6 Months)
6	Sales Pipeline Review & Supervision	HQ / Head Zone	Ongoing

3. Onboarding Checklist

A. Registration & Initial Verification

Item	Description / Requirement	Status (✓/✗)	Remarks
Registration Form	Completed and signed online registration form		
Updated CV / Professional Profile	Must reflect relevant expertise and experience		
KYC Documentation	ID, proof of address, and compliance verification		
IMCI+ Alliance Contract	Signed and dated by both parties		
NDA / NCNDA Agreement	Signed confidentiality & non-circumvention agreement		
Membership Fee (if applicable)	Payment confirmed by HQ Finance		
Welcome Letter	Sent by HQ with contact information and next steps		
Publishing on Social Media / Website	Official announcement and profile publication (if approved)		

B. Legal & Administrative Setup

Item	Description / Requirement	Responsible	Status (✓/✗)	Remarks
Creation of IMCI+ Email & Access Credentials	Setup of official IMCI+ email (optional under Alliance domain)	HQ		
Access to Shared Platforms	SharePoint, Drive, CRM access granted	HQ		
IMCI+ Presentation Package	Includes Vision 2025, Company Profile, and MFLP Brochure	HQ		
Alliance Directory Listing	Member added to global Alliance directory	HQ		
Assignment to Head Zone	Confirmed and documented	HQ		
Confirmation to Head Zone	HQ sends welcome notice to respective Head Zone	HQ		

C. Orientation & Kick-Off Meeting

Item	Description / Objective	Responsible	Timeline	Status (✓/✗)
Invitation to Kick-Off Webinar	Participation is **mandatory**	HQ / Head Zone	Within 2–3 weeks	
Introduction of Leadership	Presentation by CEO, Executive Team, and Head Zones	HQ / Head Alliance		
IMCI+ Ecosystem Overview	Vision 2025 / Vision 2030 explained	HQ		
MFLP & XL Programs	Introduction to program logic, methodology, and structure	Capital Team		
Compliance & Ethics	Review of code of conduct, NCNDA, and client handling policy	Legal Dept.		
Q&A Session	Open discussion and clarification	HQ / Head Zone		

D. Integration into the Sales Pipeline

Item	Description / Objective	Responsible	Status (✓/✗)	Remarks
Creation of Personal Sales Tracker	Excel or CRM sheet created for each member	Head Zone		
Initial Lead Submission	At least 2–3 leads submitted within first 45 days	Member		
Review of Sales Pipeline Guidelines	Confirm understanding of the MFLP Guidelines Document	Member / Head Zone		
Application of Pre-Qualification Tools	Use of PQF, TAF, NCNDA, LOI templates	Member / Head Zone		
Feedback Session	Head Zone reviews initial leads and provides feedback	Head Zone		

E. Mentoring, Coaching & Supervision

Item	Description / Objective	Frequency	Responsible	Status (✓/✗)
Assignment of Mentor	Senior Associate or Head Zone appointed	Upon onboarding	HQ	
Monthly Check-In	30–45 minute call to review progress and challenges	Monthly	Head Zone / Mentor	
Training Sessions	On financial products, due diligence, and client engagement	Quarterly	HQ Capital Team	
Peer Networking	Webinars and group sessions with new members	Bi-monthly	HQ / Alliance Coordination	
Performance Report	Submitted by Head Zone summarizing engagement and potential	Every 3 months	Head Zone	
Supervisory Review	IMCI HQ evaluates progress and performance	Semi-annually	HQ	

4. Evaluation Milestones

Period	Objective / Evaluation Criteria	Evaluator
After 30 Days	Completion of onboarding checklist, participation in Kick-Off meeting, first leads identified	Head Zone
After 90 Days	Minimum 2 qualified leads submitted, understanding of MFLP process, participation in webinars	Head Zone / HQ
After 180 Days	Consistency demonstrated, integrated into pipeline, active project participation	HQ
After 1 Year	Evaluation for renewal or promotion to Full Member / Head Zone candidate	HQ / CEO / Board

5. Mentoring & Coaching Philosophy

The IMCI+ mentoring system is built on **three pillars**:

1. **Knowledge Transfer** – Sharing tools, methods, and best practices.
2. **Business Guidance** – Supporting members in evaluating, negotiating, and structuring opportunities.
3. **Performance Supervision** – Ensuring that every lead or client contact contributes effectively to the global sales pipeline.

Mentoring should remain **constructive, confidential, and performance-oriented**, with measurable results through quarterly **Sales Pipeline Reviews**.

6. Supervision of the Sales Pipeline

Aspect	Guideline
Pipeline Submission	All projects must follow the PQF + TAF structure.
Quality Threshold	Only pre-qualified, bankable projects are accepted.
Head Zone Control	Maintain an updated pipeline file for each region.
HQ Oversight	IMCI HQ consolidates and reviews the global pipeline monthly.
Key Metrics	Active leads, conversion ratio, feedback, and stage tracking.
Reporting Frequency	Head Zones must send updated pipelines every 4–6 weeks.

7. Continuous Development

- Participation in internal training and webinars (mandatory **at least twice per year**).
- Regular updates on new financing structures (MFLP, XL, and related solutions).
- Annual performance review with CEO/Chairman or Head Zone.
- Eligibility for promotion to **Head Zone**, **Senior Associate**, or **Regional Advisor** roles based on merit and leadership.

8. Final Note

This checklist and manual represent the **official onboarding framework** of **IMCI+**. Its correct implementation ensures that every new member integrates effectively into the global ecosystem, contributing to a **strong, professional, and results-driven Alliance**.

The Head Alliance and **Head Administration / Assistant Administration** and **Head Zones** are responsible for the successful execution of this process and must **monitor each member's first six months of activity closely**, ensuring productivity, ethics, and full alignment with IMCI+ global standards.

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