

ROADMAP



**Where
Innovation
Meets
Opportunity.**

Advisor Welcome Guide

WELCOME

Dear Technology Source team member,

We would like to take this opportunity to welcome you to our Advisor program.

Technology Source is the **Sourcing as a Service** company, with over 500 best-in-class business solution providers. Technology Source's providers serve 60+ countries around the world. For more than two decades, Technology Source has been earning trust with partners throughout the United States. When you partner with Technology Source, we make a commitment to the success of your business. *Learn more about Technology Source's Products, Services providers and global reach at: technologysource.com/services and technologysource.com/service-providers.*

Technology Source's Advisor program is unique to the industry. We have paired a global product set, including IT Services, telecom services and mobility services with highly skilled Technology Advisors. We provide our Advisors access to a tenured and successful Senior Advisor that will help accelerate your success. In addition, our Advisors are provided access to critical tools. These tools include; marketing resources, use of our brand, use of our website, a Technology Source email address, business cards and presentations — all at no cost to you.

As an Advisor for Technology Source, you will play a critical role in our success. Your unique background and skill set, provides our clients with a critical resource in an environment where there is never enough budget or headcount available in today's IT Department.

With our unique approach, your clients will have an unparalleled experience. With your help, Technology Source will guide your clients through the process of identifying project requirements, designing a custom-tailored solution, assisting with vendor selection, price negotiation and implementation support. Our service doesn't stop at the sale. Technology Source offers your clients assistance with implementation escalations and even post-sale support.

Building your business will not be easy, it will take dedication, discipline and hard work, but we are confident that we can succeed together.

Sincerely,

Dominic Antonini
President

Robert Olson
Executive Vice President

Sonya Meline
Vice President

87 Products

532 Service Providers

60+ Countries

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Agreement

Technology Source believes a successful relationship starts with a commitment.

Having an agreement in writing, protects all parties from misunderstandings.

Execute your agreement via the DocuSign document sent to your email address. If you did not receive a DocuSign agreement, check your junk folder within your email account.

An executed copy of the agreement will be provided to you or you can contact Rob Olson at rob.o@technologysource.com for a copy.



E-mail

Our email is on a cloud-based server hosted by Rapidscale.

Look for, and be expecting an email, from Rapidscale with set up information and credentials.

A company-paid email account will be available for the first 90 days. Advisors may maintain a free account if they set a minimum of three new appointments each quarter.

Set up information:

- Outlook 365
- Server information should populate automatically
- Typically the default password is: abC1234!
- You can also access email remotely and reset your password at:
<https://webmail.rsapps.com/owa>.

If you need help setting up your email on your phone or laptop, please contact Rapidscale:

- Support@rapidscale.net
- 866.686.0328



Business Cards

You will be issued Technology Source business cards following your first client acquisition.

LinkedIn

Technology Source provides two header options, one in black and one in gray.

Please be sure to update your LinkedIn page with our company name and logo.

Social Media Posts

Any social media posts or paid advertising that utilizes our name or logo, requires approval in advance of the posting / placement. Please direct those requests to Sonya Meline, our Vice President, for approval. Sonya's contact information can be found in the last section of this on-boarding guide.



YouTube

Please take a moment to subscribe to the Technology Source YouTube channel.

Once subscribed, you'll enjoy viewing webinars, events and other informative videos we've posted for your convenience.

Please invite your friends and business contacts to subscribe to the Technology Source YouTube channel!



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Technology Source always finds savings!

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Business Operations Manager

Orientation

Our Business Operations Manager will schedule time with new Advisors during the first week, following receipt of an executed agreement, for orientation.

Items Reviewed Include

- eMail set-up
- eMail signature set-up
- LinkedIn Set Up
- Social Media Announcement
- Available partner Portal Resources
 - Upcoming provider events
 - Provider training calendar
- Business Development Program Overview
- Software training
- Introduction to your Senior Advisor



Caleb Temple

Business Operations Manager
Knoxville, TN



Your Senior Advisor

You will be teamed with an experienced Senior Advisor that will help guide your referrals to success at Technology Source.

Our Senior Advisors are highly experienced and have built their businesses from the ground up.

Your Senior Advisor will assist your referrals throughout the solution development process.

From the initial client meeting, Technology Source follows a strict process to thoroughly understand the clients needs. From there our team will work with our team of providers to identify a best-in-breed solution that meets their budget and implementation timeline.



Sean Mooney
Senior Advisor
San Diego, CA



Will Patterson
Senior Advisor
Nashville, TN



Jesus Arriaga
Senior Advisor
Glendora, CA



Jason Clements
Senior Advisor
Brea, CA



Gain financial independence.

With Technology Source our compensation model provides our Advisors up-front compensation and a pathway to employment.

- *Example:*
 - *Sell \$5,000 in monthly billing*
 - *Receive \$5,000 in compensation at the end of the following month.*
- *If your billing base exceeds \$15,000 in monthly billing in any 90-day period, you have the option of becoming an employee of Technology Source.*
- *Whether you become an employee or stay on as an independent contractor with Technology Source you will benefit from an attractive compensation plan that features unlimited income potential.*
- *Please work with your Senior Advisor when engaging with our providers to ensure we are using our assigned representatives. Failure to use our assigned representatives can result in a loss of compensation.*



ELEMENTS OF SUCCESS | Roadmap calls

1

Roadmap Call – Friday

On-boarding call that provides a review of available resources from Technology Source.



2

Weekly Sales Call with your Senior Advisor

Strategize on your opportunities and plan for success

3

Bi-Monthly Best Practices Call

Discuss ideas that drive success.

Learn from the experiences of Senior Advisors and Advisors.

Guest presenters from our providers share information on their product options.



Product Portfolio

ELEMENTS OF BUSINESS SUCCESS

Cyber Security										Marketing													
Ma Multi-Factor Authentication	Business Optimization										Connectivity										Uc Unified Communications as a Service	Dm Digital Marketing	Gf Geo-Fencing
Fw Managed Firewall	Dr Disaster Recovery	Ps Pro Services	Ms Managed Services	Software & Applications										Sw SD-WAN	St SaaS	Df Dedicated Fiber	Cc Contact Center as a Service	Wld Wholesale Long Distance	Cr Call Recording	Dg Data Gathering	Wd Website Development		
Wf Web Filtering	Tm Telecom Expense Management	Bc BI Consolidation	Er Expense Reduction	Sd Custom Software Development	Api API Integration	Ss Software as a Service	Fm Fiber Managed Network	Wi WiFi as a Service	Tm Telecom Expense Management	Tm Cloud Managed (Ask & Deploy)	Rtc Web RTC	Ct Campaign Targeting	Wi WiFi Intelligence										
Em Endpoint Management	Sp Spam Filtering	Cs Cloud Strategy Consulting	Hd Help Desk	Ms CRM & Related Microsoft	Ch Cloud Managed Applications	Mo Managed Office 365	Ic International Connectivity	Bb Broadband	Tx TDM Fax Gateway as a Service	Cf Cloud Fax Services	Sp SIP Trunking	Br Branding & Story Development	Id Media Vector ID										
Mm Endpoint Management	Sc Cyber Security as a Service	Tt Trouble Ticket Management	Bc Business Continuity	Gs Google Suite	Cm CRM	Er ERP	Ds DSL	WI Wave Lengths	Ec Ethernet over Copper	PI PODS Lines	Md Mobile Device Management	Mp Mobile Phone Service	Sm SIM Cards										
Ds Desktop as a Service	Ai Artificial Intelligence	Vc Virtual CIO	Pp Policy & Procedures	At Automation	Bi Business Intelligence	Bd Big Data Analytics	Mp MPLS	PI Private Line	Dkf Dark Fiber	Tf Toll Free Services	Mb Managed Business Lines and	IoT Internet of Things	Fm Fleet Management										
Cloud & Infrastructure										Mobility													
Co Cloud	Bu Backup	Dc Data Center	Ch Cloud Hosting	Hc Hybrid Cloud	Ds Data Storage	IaaS Infrastructure as a Service	DaaS Desktop as a Service	Bla Block Chain															

www.technologysource.com

Portal Access

1. Go to our website
2. Select "Portal"
3. Enter Password: moremoney

Technologysource.com navigation: Home, Services, Resources, About, Careers, **More** (circled), Portal, Blog, Marketing

Guest Area
Please enter the password below.

password (circled)

Upcoming Events, Our Providers, Promotions & Spiffs, Training Archive, Resources, Products

Gain access to upcoming events, provider promotions, product information, training and more.



Relationships First

Start by identifying 20-30 people that you know from prior employment or personal relationships. Work with your Team Leader to contact your relationships to discuss how we can help them find providers in IT Services, Network Services and Mobility Services globally.

Your experience calling people you know, (warm prospect) will help you build the confidence needed to become more successful with people you don't know (cold prospects).

While we are a technology distributor that sells technology, you'll quickly find that what we really sell is credibility. Your confidence, when speaking with a prospect, helps to generate the credibility needed to start the journey towards converting a prospect into a client.

Business Development

Technology Source provides you access to our business development software. We utilize the latest prospecting software, which automates much of the work required, so you can start generating revenue quickly.

Every two weeks, Technology Source launches a new campaign focused on technology solutions, that are in high demand.

Our campaigns incorporate emails, calls, text, videos and webinars to introduce prospects to Technology Source providers and their solutions.



Working with your Senior Advisor

At the end of your first 60 days, you will graduate from Bootcamp and begin working with your Senior Advisor.

Your Senior Advisor has been carefully selected as an expert in the industry. Your Senior Advisor will teach you what to do, and in some cases, what not to do. We are confident, that the time you spend with your Senior Advisor will be invaluable to your future success.

During this time, with your Senior Advisor, you will continue to have access to the Technology Source prospecting campaigns. These campaigns will continue to generate new client opportunities. You, and your Senior Advisor, will review these leads and work to identify solutions, select service providers and present a final design to your client.

Service Provider Support

Technology Source's Service Providers are always available to meet with customers, assist with designs and present the final solution to your client.

Our Service providers are the subject matter experts and will work with you to assemble a team that will support your effort to win new business.



Additional resources

Be sure to join the **Advisor Best Practices call**.

Learn from Senior Advisors, and your peers, as they review successful case studies.

- Hear about Technology solutions .
- Learn from the Technology Source provider experts.



TECHNOLOGY SOURCE | Team contacts

Partner Development Manager

When to engage

- *Quoting assistance*
- *Escalation assistance during implementation or post – sale*
- *Contract renewals*
- *Add-orders*

Su Beler
San Jose
714-313-4514
su.b@technologysource.com

Senior Advisor

When to engage

- *When contacting client prospects*
- *When meeting prospects*
- *When designing technology solutions*
- *To discuss best practices*
- *Assistance with developing a plan to build your business*

Sean Mooney
San Diego, CA,
760-855-7326
sean.m@technologysource.com

Will Patterson
Nashville, TN
615-604-8131
Will.p@technologysource.com

Jason Clements
Brea, CA
714-646-8899
jason.k@technologysource.com

Jesus Arriaga
Glendora, CA
626-594-9820
Jesus.a@technologysource.com

TECHNOLOGY SOURCE | Team contacts

Chief Information Officer

When to engage

- Escalation assistance
- Senior Advisor is not available for a client meeting
- When IT product expertise is needed
- As an additional resource during client prospect meetings
- C-Level meetings / Enterprise client meetings

Sonya Meline
San Jose
619-379-1088
Sonya.m@technologysource.com

Chief Revenue Officer

When to engage

- Escalation assistance
- VP / Senior Advisor is not available for a client meeting
- When Telecom product expertise is needed
- As an additional resource during client prospect meetings
- C-Level meetings / Enterprise client meetings
- Contract modifications / questions

Robert Olson
Scottsdale, AZ
602-284-2007
Rob.o@technologysource.com

Additional Contact Information:

Order submission:
Commission Issues:

Orders@technologysource.com
Commissions@technologysource.com

ARIZONA
Scottsdale
By Appointment

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714-556-8006
1551 N. Tustin Ave.
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Santa Ana, CA 92705

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Atlanta, GA 30308

TENNESSEE
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3343 Aspen Grove Dr,
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LONDON, UK
CALL US
UK: 44-2036-087459

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By Appointment

Sacramento
By Appointment

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TEXAS
Dallas
Coming Soon

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Reno
By Appointment

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