Roadmap

Sr Advisor | Welcome Guide

TECHNOLOGY SOURCE

WELCOME

Welcome,

We would like to take this opportunity to welcome you as our latest Sr. Advisor!

Technology Source is the ***Sourcing as a Service*** company with over 500 best-in-class business solution providers, serving 60+ countries around the word. For more than two decades, Technology Source has been earning trust with partners throughout the United States.

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 Senior Advisors. We provide our Advisors access to a successful Senior Advisor, like yourself, to help Advisors on their roadmap to success. In addition, our Advisors are provided access to critical tools. These tools include; marketing resources, software, support resources, product training, use of our brand, use of our website, a Technology Source email address and business cards—all at no additional cost.

As a Sr. Advisor for Technology Source, you will play a key role in our success. Your unique background, and skill set, will be used to provide critical leadership for an Advisor team. Our Advisor teams assists our clients with a critical resource, where there is never enough budget or headcount available.

With our unique approach, your clients will have an unapparelled 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 also provides implementation escalation assistance and post sale support.

Building your team will not be easy, it will take dedication, discipline and hard work. We're confident, that together, we will be successful.

Sincerely,

Dominic Antonini	**Robert Olson**	**Sonya Meline**
President	Executive Vice President	Vice President

87 Products | 532 Service Providers | 60+ Countries

TECHNOLOGY SOURCE

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TECHNOLOGY SOURCE

ELEMENTS OF SUCCESS | Agreement

Agreement

Technology Source believes a successful relationship starts with a written 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, or you can contact Rob Olson at rob.o@technologysource.com for a copy.

ELEMENTS OF SUCCESS | E-mail. Cards. Social Media

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

ELEMENTS OF SUCCESS | E-mail. Cards. Social Media

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

Please help us ensure that any social media posts or paid / unpaid 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.

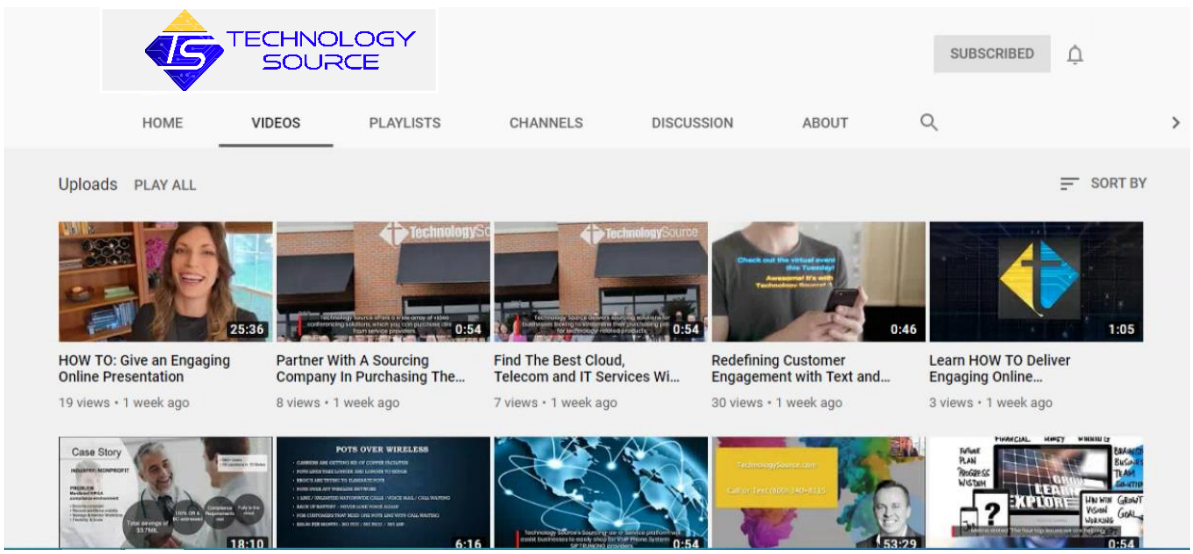
ELEMENTS OF SUCCESS | E-mail. Cards. Social Media

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!



Agreement Completed | E-mail & Cards | Orientation | Sr. Advisor Teaming | Role Review | Roadmap Calls | Website | Prospecting

TECHNOLOGY SOURCE

ELEMENTS OF SUCCESS | Orientation

Business Operations Manager

Orientation

Our Business Operations Manager will schedule time with new Sr. 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

An introduction to your Advisor team will follow your orientation meetings.

Caleb Temple
Business Operations Manager
Knoxville, TN

ELEMENTS OF SUCCESS | Senior Advisor Teaming

Your Role as a Senior Advisor

Advisors and eAgents are teamed with a Senior Advisor. As a Senior Advisor, you will help guide your team members to success at Technology Source.

As a Senior Advisor, you will assist your team 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 providers to identify a best-in-breed solution that meets the client's budget and implementation timeline.

John Perrine
Senior Advisor

Sean Mooney
Senior Advisor

Will Patterson
Senior Advisor

Shirley Ah Sing
Senior Advisor

Jesus Arriaga
Senior Advisor

Jason Clements
Senior Advisor

Michael Scharf
Senior Advisor

Ron Reeves
Senior Advisor

Agreement Completed | E-mail & Cards | Orientation | Sr. Advisor Teaming | Role Review | Roadmap Calls | Website | Prospecting

TECHNOLOGY SOURCE

ELEMENTS OF SUCCESS | Advisor Leadership

Senior Advisor

Our Senior Advisors are made up of seasoned, successful sales professionals.

The objective of our Senior Advisors is to coach and develop our Advisor team to accelerate revenue production and minimize turn-over.

Your role includes, but is not limited to the following responsibilities:

Prospecting Assistance

- Call / VM script development
- Objection handing
- Role playing
- Whisper-mode coaching

Appointments and Meetings

- Agenda creation
- Develop ualifying questions
- Assist with Identifying client requirements

Weekly Sales Meetings

- Review weekly, monthly and annual activity analytics
- Review funnel opportunities
- Provide coaching / advice on best practices to close business

Salesforce Maintenance

- Updating Salesforce with client and opportunity information.
- Updating sales stages
- Attaching quotes and executed agreements

Account Renewals and Add-Orders

- Up-selling into your team's existing client base
- Reviewing contract expiration reports
- Working with our PDM to identify the account managers at the respective provider to renew contract terms

Tracking Sales Trending

- Monitor sales trending, average sale size, funnel contributions and overall funnel size.
- Communicate areas of concern and provide coaching as needed.

Creation of a Sales Plan

- Communication of monthly revenue production expectations.
- Creation of an activity plan that will result in the desired revenue output

Agreement Completed → E-mail & Cards → Orientation → Sr. Advisor Teaming → Role Review → Roadmap Calls → Website → Prospecting

TECHNOLOGY SOURCE

ELEMENTS OF SUCCESS | Role Review - Advisor

Advisor

At 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.*

Technology Source's exclusive prospecting program

- Our Advisors also benefit from our exclusive prospecting program and related software to assist in driving new business opportunities.
    - Contact data
    - Marketing campaign
    - Product training
    - Appointment setting guides

Successful Advisors can take advantage of an employment opportunity at Technology Source.

- Advisors that bill more than, $5,000 in recurring monthly billing, in any 90-day period may be extended the option of becoming a full-time salaried employee of Technology Source.

ELEMENTS OF SUCCESS | Role Review - eAgent

eAgent

At Technology Source our compensation model provides our eAgents a 50% split on all service provider compensation.

- Example:
  - *An eAgent signs $5,000 in monthly billing.*
  - *Expect provider compensation to average 10% of the billing.*
  - *eAgents can also earn up to 50% of Service provider spiffs which can pay up to $15,000 for a customer billing $5,000. Spiffs are in addition to their monthly commissions—adding $7,500 to your compensation.*

Technology Source's exclusive prospecting program

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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

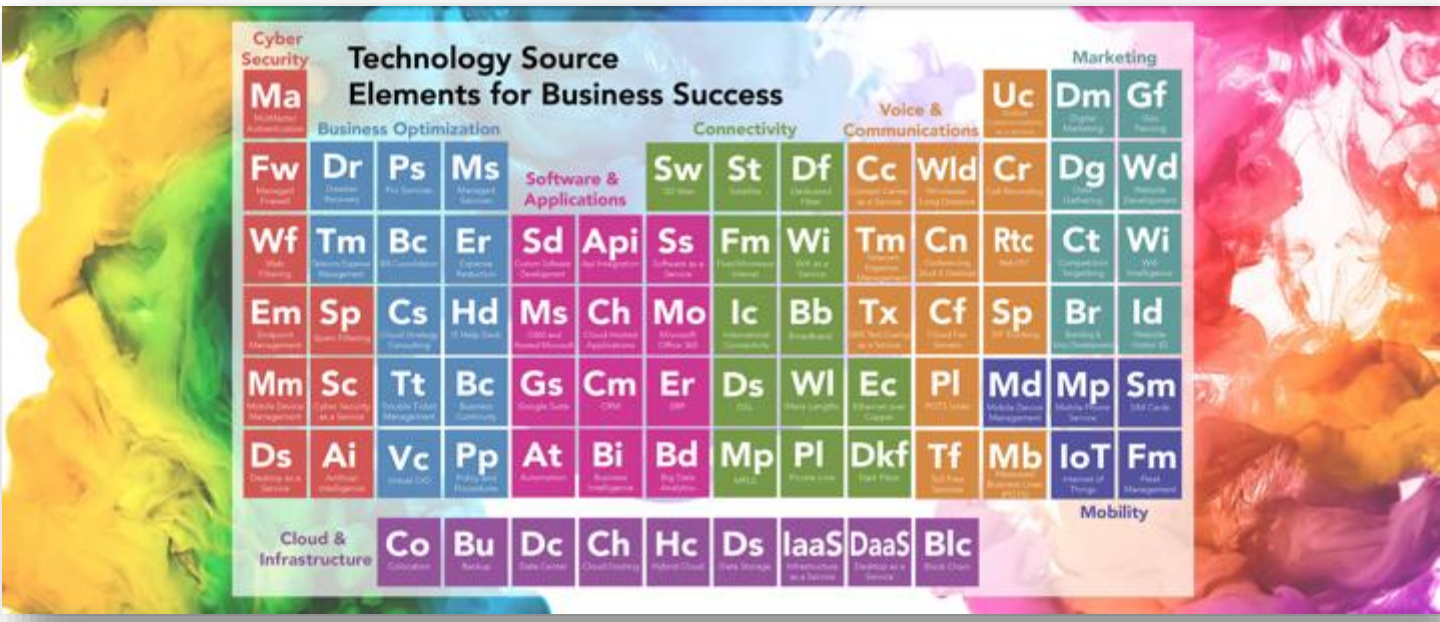
Discuss ideas that drive success.

Learn from the experiences of Senior Advisors and Advisors.

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

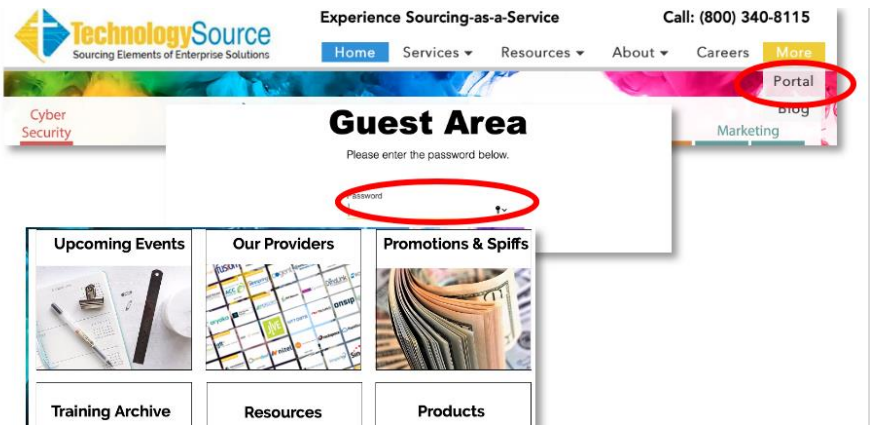
ELEMENTS OF SUCCESS | Website – Technologysource.com

Product Options



Portal Access

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



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

Agreement Completed | E-mail & Cards | Orientation | Sr. Advisor Teaming | Role Review | Roadmap Calls | Website | Prospecting

TECHNOLOGY SOURCE

ELEMENTS OF SUCCESS | Client Prospecting

Relationships First

Advisors and eAgents should start by identifying 20-30 people that they know from prior employment or personal relationships. Work with your Advisors and eAgents to contact their relationships to discuss how we can help them find providers in IT Services, Network Services and Mobility Services globally.

The experience from calling people they know, will help them build the confidence needed to become more successful with people they don't know.

While we are a technology distributor that sells technology, you'll quickly find that what we really sell is credibility. The confidence of our Advisors and eAgents, when speaking with a prospect, helps to generate the credibility needed to converting a prospect into a client.

Business Development

Technology Source provides your team access to our Business Development team. We utilize the latest prospecting software, which automates much of the administrative work required, so your team 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.

ELEMENTS OF SUCCESS | Client Prospecting

Prospecting Program Support

- PRODUCT MARKETING CAMPAIGN
- WEEKLY TRAINING MEETINGS - TUE / THUR
- ROADMAP APPT SCRIPT
- HOT LEAD NOTIFICATION
- WEBSITE VISITORS TRACKED
- WEBINAR REGISTRATIONS TRACKED
- END-USER WEBINAR

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
Monterey
714-313-4514
su.b@technologysource.com

Business Operations Manager

When to engage

- *Help or questions regarding prospecting software tools*
- *On-Boarding new employees*

Caleb Temple
Knoxville, TN
865-660-1015
Caleb.t@technologysource.com

Vice President

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

Executive Vice President

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:	Orders@technologysource.com
Commission Issues:	Commissions@technologysource.com