



# Roadmap

**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 150 best-in-class business solutions, and over two decades earning trust with client 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 more with highly skilled technology Advisors. We provide our Advisors access to a tenured and successful Senior Advisor that will help excellerate 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 todays IT Department.

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 offers 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.

Let's get started!

Sincerely,

**Dominic Antonini**  
President

**Robert Olson**  
Executive Vice President

**Sonya Meline**  
Vice President

# TABLE of contents



1. Your agreement with Technology Source
2. Email. Cards. Social media.
3. PDM Orientation
4. Senior Advisor Teaming
5. Compensation
6. Roadmap calls
7. Website
8. Success plan
9. Team contacts

### Agreement

*Execute your agreement via DocuSign. If you did not receive it in your email contact us.*

*Technology Source believes a successful relationship starts with a commitment.*

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

*An executed copy of the agreement will be provided to you or you can contact [rob.o@technologysource.com](mailto:rob.o@technologysource.com)*



### E-mail

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

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

Set up information:

- Exchange Server:  
`snaex15.rsapps.com`
- 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](mailto:Support@rapidscale.net)
- 866.686.0328

E-mail signature  
Copy, and paste into your email signature block:

**John Doe**  
Advisor



(714) 555-1212  
[www.technologysource.com](http://www.technologysource.com)



## Business Cards

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

Business card sample:



## LinkedIn

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

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



## Social Media Posts

*Please be sure to have Sonya Meline review and approve any social media posts or paid advertising, that utilize our name or Logo in advance of the posting / placement.*





### Partner Development Managers (PDM)

#### Orientation

*One of our PDMs will contact you shortly to schedule time with you following the execution of your agreement.*

#### Reviews

- Available referral partner portal resources
- Upcoming provider events
- Provider training calendar
- Mailchimp and other marketing support
- Provider escalation assistance
- Provider selection assistance
- Escalation assistance. PDMs assist with escalations during implementations as well as post-sale.

• Maintaining your revenue is a critical concern. Our PDM's will help you identify when accounts are up for renewal, and help engage provider account managers to protect your hard-earned revenue.



**Anne Kolbo**  
Partner Development Mgr  
Santa Ana, CA



**Su Beler**  
Partner Development Mgr  
San Jose, CA

Agreement

PDM  
Orientation

Senior  
Advisor

Training  
Resources

Events

Products

## 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.*



**John Perrine**  
Senior Advisor  
Orange County, CA



**Sean Mooney**  
Senior Advisor  
San Diego, CA



**Will Patterson**  
Senior Advisor  
Nashville, TN



**Tom Graham**  
Region Director  
Nashville, TN



**Stephanie Mountain**  
Senior Advisor  
Orange County, CA



**Tony Strickland**  
Region Director  
Atlanta, GA

Agreement

PDM  
Orientation

Senior  
Advisor

Training  
Resources

Events

Products



### 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

*Overview of available resources from Technology Source personnel and support.*

2

### Weekly Q & A Call each Friday

*Ask questions and hear from other Advisors that are also ramping up their Technology Source career.*

3

### Weekly Sales Call with Senior Advisor

*Strategize on your opportunities and plan for success*

4

### Bi-Monthly Best Practices Call

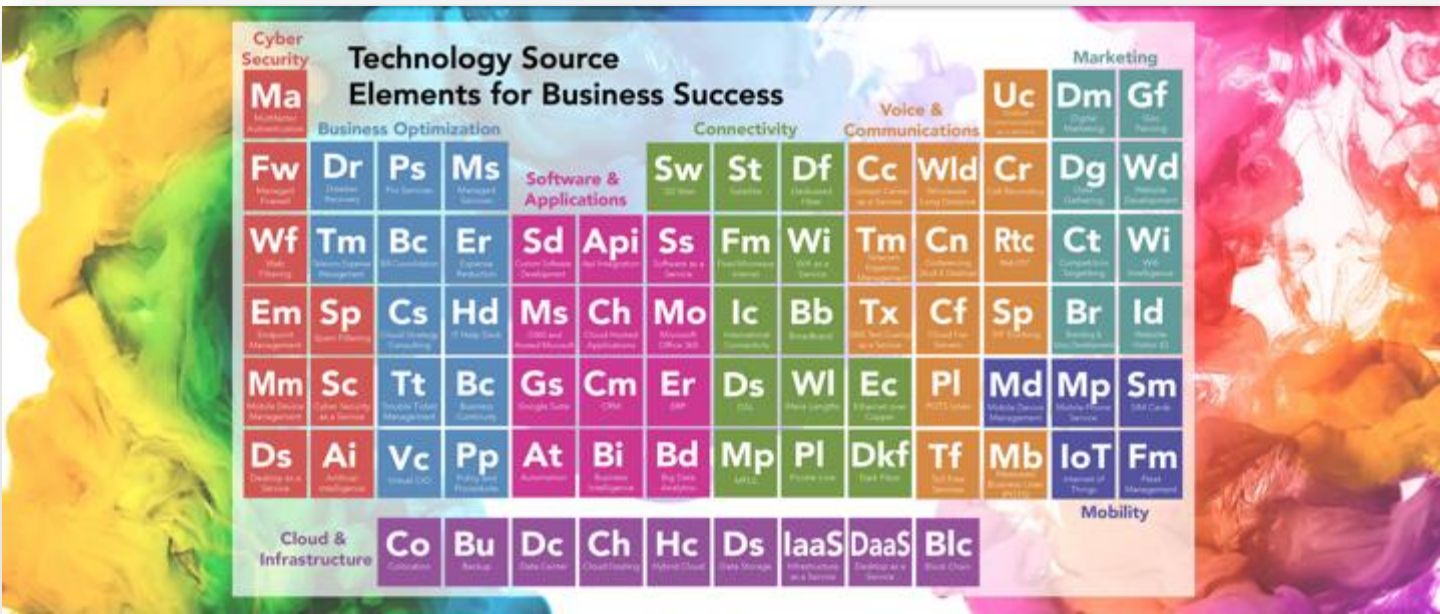
*Discuss ideas that drive success.*

*Learn from the experiences of Senior Advisors and Advisors.*

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

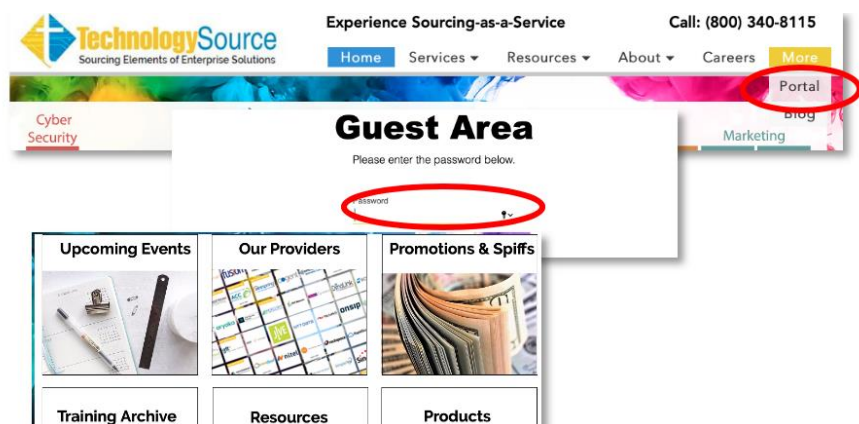


## Product Portfolio



## Portal Access

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



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



# ELEMENTS OF SUCCESS | Success plan

## Week 1

### First meeting with Senior Advisors

- *Identify key contacts and create messaging*
- *Your first contacts should be people you know well.*
- *Focus on your area of expertise initially*
- *Review talking points and email scripting*

### Week 1 Expectations

- *20 phone contacts each day*
- *20 e-mail contacts each day*
- *Set 2 appointments*
- *Your Senior Advisor will join your appointments – in person or via conference*

### Review Prospecting Roadmap PPT

- *Ask your Senior Advisor to review the Advisor Prospecting Roadmap.*
  - Phone scripts
  - Email scripts
  - Mailchimp templates
  - Prospecting best practices

### Result Tracking

- *Track the number of contacts made to the number of appointments generated.*
- *Adjust the number of contacts required to meet appointment goal accordingly.*



### Additional resources

- *Mailchimp – email campaign with tracking*
- *Access to Senior Advisor for assistance during initial appointment, solution design, provider selection and closing meetings.*
- *Product training – log into the Technology Source Portal.*
  - *Password: moremoney*
  - *>Select "portal"*
  - *>Select "training archive"*





## Week 2

Review Roadmap PPT: Gain A Competitive Advantage

- *Technology Source's value proposition.*
- *Review product set*
- *Review available providers*
- *Review client opportunity process*
- *Provider negotiation*
- *Implementation support*
- *Post-sales support*

## Week 2 Expectations

- *30 phone contacts each day*
- *30 e-mail contacts each day*
- *Set **3** appointments week 2*
- *Your Senior Advisor will join your appointments*

## Results Tracking

- *10 contacts should generate 1 appointment.*
- *Track the number of contacts made to the number of appointments generated.*
- *Adjust the number of contacts required to meet appointment goal accordingly.*
- *You also may need to re-word your messaging to increase impact.*



## Additional resources

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

Learn from Senior Advisors as they review successful case studies.

Hear about solutions available from key Technology Source providers.

Be prepared to take notes.



### Week 3

#### Certification: Technology Leadership Academy

TLA is a valuable sales enablement program with three video-based sales certifications taught by the experts at Rapidscale, a Technology Source provider.

In addition, there are go-to-market sales and marketing resources for when you're ready to put your training to the test. Other features include:

- The only "How to sell desktop as a service" certifications in the industry.
- One of the only "Selling Managed Office 365" certifications available.
- A "Cloud Sales Fundamentals" certification for those who want to learn the basics.
- Sales Toolkit complete with email templates, case studies, data sheets and more.
- Content and materials from industry-leading technology providers like Mimecast, Veeam and Velocloud.

Sign up here:

<https://technologyleadership.academy/registration-identifier/>



#### Additional resources

##### Weekly Cloud Video

Deliver more value and expertise to your customers and prospects.

Check out: 6 Signs It's Time to Move to the Cloud with DaaS"

Watch here:

<https://youtu.be/LobjufGdxYg>





## ELEMENTS OF SUCCESS | Success plan

### Week 3 (Continued)

#### Expectations

- 40 phone contacts each day
- 40 e-mail contacts each day
- Set **5** appointments week 3
- Your Senior Advisor will join your appointments
- Study Portal Trainings and Products

### Week 5

#### Expectations

- 40 phone contacts each day
- 40 e-mail contacts each day
- Set **5** appointments week 4
- Your Senior Advisor will join your appointments
- Study the Portal information

### Week 6 – 12

#### Expectations

- 40 phone contacts each day
- 40 e-mail contacts each day
- Set **9** appointments each week

#### Results Tracking - Continue

- 10 contacts should generate 1 appointment.
- How many appointments did you generate?
- Adjust the number of contacts to meet appointment goal accordingly.
- Once your first client opportunity signs, start tracking your average revenue per client.



#### Success tip

Do you have income goal?

Using the data you have collected on contacts, appointments and new client revenue, work backwards to determine a revenue plan that meets your income goal.



### Ongoing

#### Expectations

- 40 contacts each day
- 40 e-mail contacts each day
- Set **5** appointments week – 1 per day
- Your Senior Advisor or Provider  
Managers will join your appointments

#### Results Tracking - Continue

- 10 contacts should generate 1 appointment.
- How many appointments did you generate?
- Adjust the number of contacts to meet appointment goal accordingly.
- Once your first client opportunity signs, start tracking your average revenue per client.



#### Success tip

Do you have income goal?

Using the data you have collected on contacts, appointments and new client revenue, work backwards to determine a revenue plan that meets your income goal.



# TECHNOLOGY SOURCE | Team contacts

## Partner Development Manager

### When to engage

- *Systems orientation*
- *Quoting tool assistance*
- *Escalation assistance during implementation or post sale*
- *Assistance with marketing tools*
- *When you need to identify provider Account Managers that can assist with client contract renewals or add-orders.*

**Su Beler**  
San Jose  
714-313-4514  
[su.b@technologysource.com](mailto:su.b@technologysource.com)

**Anne Kolbo**  
Orange County  
949-391-8777  
[anne.k@technologysource.com](mailto:anne.k@technologysource.com)

---

## Senior Advisor

### When to engage

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

**John Perrine**  
Orange County / Los Angeles, CA  
714-926-6473  
[John.p@technologysource.com](mailto:John.p@technologysource.com)

**Stephanie Mountain**  
Orange County / Los Angeles, CA  
949-514-0784  
[Stephanie.M@technologysource.com](mailto:Stephanie.M@technologysource.com)

**Sean Mooney**  
San Diego, CA,  
760-855-7326  
[sean.m@technologysource.com](mailto:sean.m@technologysource.com)

**Tom Graham**  
Nashville, TN,  
865-384-3042  
[Tom.g@technologysource.com](mailto:Tom.g@technologysource.com)

**Will Patterson**  
Nashville, TN  
615-604-8131  
[Will.p@technologysource.com](mailto:Will.p@technologysource.com)

**Tony Strickland**  
Atlanta, GA  
404-202-3428  
[Tony.s@technologysource.com](mailto:Tony.s@technologysource.com)

# TECHNOLOGY SOURCE | Team contacts

## 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](mailto: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](mailto:Rob.o@technologysource.com)

## Additional Contact Information:

Order submission:  
Commission Issues:

[Orders@technologysource.com](mailto:Orders@technologysource.com)  
[Commissions@technologysource.com](mailto:Commissions@technologysource.com)

**ARIZONA**  
Scottsdale  
By Appointment

**FLORIDA**  
Jacksonville  
By Appointment

**NEVADA**  
Reno  
By Appointment

**CALIFORNIA**  
Orange County  
714-556-8006  
1551 N. Tustin Ave.  
Suite #125  
Santa Ana, CA 92705

**Sacramento**  
By Appointment

**San Diego**  
760-729-5305  
440 Stevens Ave,  
Suite #200  
Solana  
Beach, CA 92075

**San Jose**  
6203 San Ignacio Ave,  
Suite 110,  
San Jose, CA 95119

**TENNESSEE**  
Nashville  
615-905-0090  
3343 Aspen Grove Dr,  
Suite 220  
Franklin, TN 37067

**TEXAS**  
Dallas  
Coming Soon

**LONDON, UK**  
CALL US  
UK: 44-2036-087459