



Roadmap

Referral Partner | Welcome Guide

WELCOME



Dear Technology Source team member,

We would like to take this opportunity to welcome you to our Referral Partner Program!

Technology Source is the **Sourcing as a Service company** with over 150 best-in-class business solution providers, and over two decades earning trust with client throughout the United States.

Technology Source's Referral Partner Program is unique to the industry. We have paired a global product set, including IT Services, Telecom Services and Mobility services with our highly skilled Senior Advisors. Our Senior Advisors work with your referrals to provide solutions while also delivering an additional source of income for you.

Technology Source will guide your referrals through the process of identifying project requirements, designing a custom-tailored solution, assisting with vendor selection, price negotiation, implementation escalation and post sale support. You can always trust our team of professionals to deliver an outstanding experience for your referrals.

In addition, as your income increases, you may decide to join our team as a full-service partner leaving the 9-5 world to run your own business. Our referral program is the perfect foundation to building your long-term success and financial security. Ask about our eAlliance program for more information on this exciting opportunity.

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. PDM Orientation
3. Senior Advisor Teaming
4. Training resources
5. Events
6. Products
7. Technology Source contacts

Agreement

A Docusign agreement has been sent to your email for signature. If you have not received it, please check your junk folder.

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



Partner Development Managers (PDM)

Orientation

Schedules time with new referral partners during first week of executed agreement

Reviews

- Available partner Portal Resources
- Upcoming provider events
- Provider training calendar
- Mailchimp marketing support
- Provider escalation assistance
- Provider recommendation assistance



Su Beler

Partner Development Mgr
San Jose, CA



Anne Kolbo

Partner Development Mgr
Los Angeles, CA Orange
County, CA
San Diego, CA



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

Training Assistance

Our Providers

Within the Technology Source Portal located within our website, you'll have access to most of our available providers, their sales teams, websites, literature and training.

Event Calendar

In our Event Calendar, located within our portal, you can also find the schedule of upcoming events, webinars, and live training.

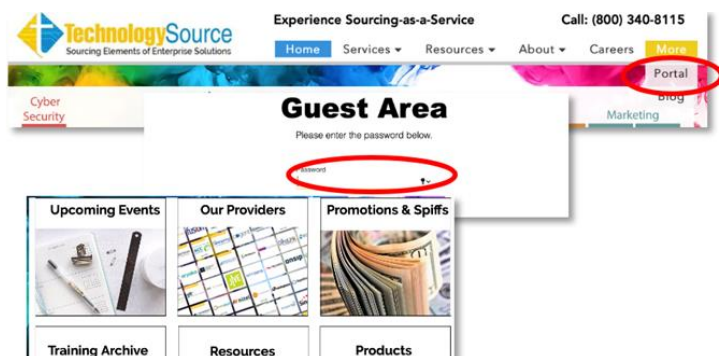
Training Archive

Gain access to years of recorded provider trainings available in our portal.



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.



Events

A great way to educate both prospects and existing clients on new technologies and solutions.

Our providers can tailor presentations aimed at a particular product or trends in the market that your client would be interested in learning more about.

Venues can include Technology Source's headquarters, restaurants or entertainment venues.

TechLab

TechLab is an all day seminar where you'll get the opportunity to speak directly with industry leaders about available products.

Learn from in-depth discussions about products and services offered by our featured providers.

Each TechLab offers certifications for the products and services covered.



Please Join Us!

Telecom Brokers Presents: **TPx Communications & Cyxtera**
"What is your digital transformation (DX) strategy and where are you at on that journey?"

Technology Trend Agenda

Agreement

PDM
Orientation

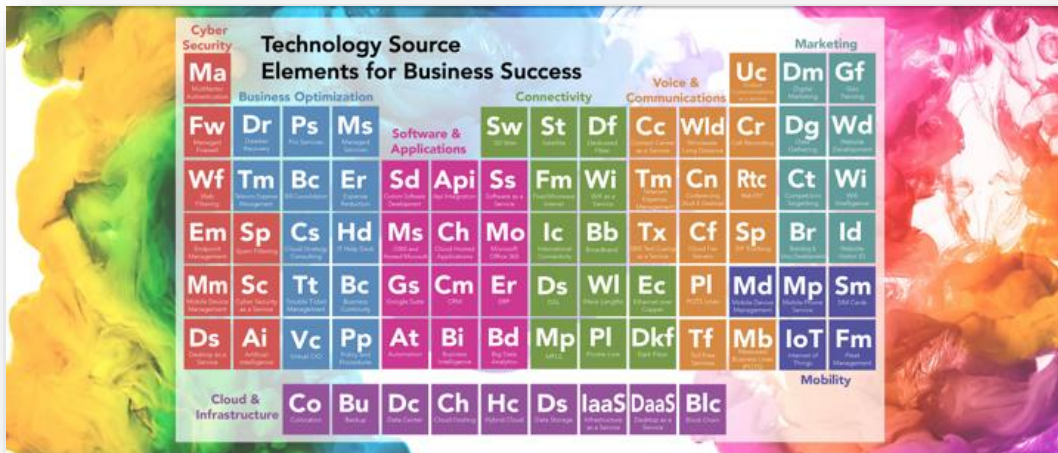
Senior
Advisor

Training
Resources

Events

Products

Product Options



Ma Multi-tier Authentication	
Fw Firewalled Forward	
Wf Web Filtering	
Em Endpoint Management	Sp Spam Filtering
Mm Mobile Device Management	Sc Other Security as a Service
Ds Outgoing as a Service	Ai Artificial Intelligence

Cyber Security

EXPLORE CYBER SECURITY PROVIDERS

- Multifactor Authentication
- Managed Firewall
- Web Filtering
- Endpoint Management
- Spam Filtering
- Mobile Device Management
- Cyber Security as a Service
- Desktop as a Service
- Artificial Intelligence

Business Optimization

EXPLORE BUSINESS OPTIMIZATION PROVIDER

- Disaster Recovery
- Pro Services
- Managed Services
- Telecom Expense Management
- Bill Consolidation
- Expense Reduction
- Cloud Strategy Consulting
- IT Help Desk
- Trouble Ticket Management
- Business Continuity
- Virtual CIO
- Policy and Procedures

Dr Director, Recovery	Ps Pro Services	Ms Managed Services
Tm Team Expense Management	Bc B2B Contributor	Er Expense Reduction
	Cs Cloud Strategy Consulting	Hd IT Help Desk
	Tt Trouble Ticket Management	Bc Business Continuity
	Vc Virtual CIO	Pp Pricing and Procurement

Software & Applications

EXPLORE SOFTWARE & APPLICATION PROVIDERS

- Custom Software Development
- Api Integration
- Software as a Service
- O365 and Hosted Microsoft
- Cloud Hosted Applications
- Microsoft Office 365
- Google Suite
- CRM
- ERP
- Automation
- Business Intelligence
- Big Data Analytics

Sd Current Software Development	Api Api Integration	Ss Software as a Service
Ms Cloud and Microsoft Microsoft	Ch Cloud Hybrid Applications	Mc Microsoft Office 365
Gs Google Suite	Cm CRM	Er ERP
At Automation	Bi Business Intelligence	Bd Big Data Analytics

Connectivity

EXPLORE CONNECTIVITY PROVIDERS

- SD Wan
- Satellite
- Dedicated Fiber
- Fixed Microwave Internet
- Wifi as a Service
- International Connectivity
- Broadband
- DSL
- Wave Lengths
- Ethernet over Copper
- MPLS
- Private Line
- Dark Fiber

Sw Swiss	St Swedish	Df Danish	
	Fm Finnish	Wi Welsh	
	Ic Icelandic	Bb Breton	
	Ds Dutch	Wl Walloon	Ec English
Mp Maltese	Pl Polish	Dkf Dutch-Flemish	

Voice & Communications

EXPLORE VOICE & COMMUNICATION PROVIDERS

- Unified Communications as a Service
- Contract Center as a Service
- Wholesale Long Distance
- Call Recording
- Telecom Expense Management
- Conferencing (Audi & Desktop)
- Web RTC
- SMS text Cueing as Service
- Cloud Fax Servers
- SIP Trunking
- POTS Lines
- Toll Free Services
- Measured Business Lines (POTS)

Voice & Communications		Uc
Cc	Wld	Cr
Call Center and Service	Website Long Distance	Call Room
Tm	Cn	Rtc
External Marketing	Customer And E-Service	Quality
Tx	Cf	Sp
Self-Service And e-Service	Customer Care	Self-Service
	Pl	
	Notepad	
Tf	Mb	
Self-Service Marketing	Marketing And e-Service	

Mobility

EXPLORE MOBILITY PROVIDERS

- Mobile Device Management
- Mobile Phone Service
- SIM Cards
- Internet of Things
- Fleet Management

Md Mobile Device Management	Mp Mobile Phone Service	Sm SIM Cards
	IoT Internet of Things	Fm Fleet Management

Cloud & Infrastructure

EXPLORE CLOUD & INFRASTRUCTURE PROVIDERS

- Colocation
- Backup
- Data Center
- Cloud Hosting
- Hybrid Cloud
- Data Storage
- Infrastructure as a Service
- Desktop as a Service
- Block Chain

Co Concepts	Bu Build	Dc Data Center	Ch Cloud Hosting	Hc Hybrid Cloud	Ds Data Storage	IaaS Infrastructure as a Service	DaaS Desktop as a Service	Blc Block Chain
-----------------------	--------------------	--------------------------	----------------------------	---------------------------	---------------------------	--	-------------------------------------	---------------------------

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

Anne Kolbo
Orange County
949-391-8777
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

Stephanie Mountain
Orange County / Los Angeles, CA
949-514-0784
Stephanie.M@technologysource.com

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

Tom Graham
Nashville, TN,
865-384-3042
Tom.g@technologysource.com

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

Tony Strickland
Atlanta, GA
404-202-3428
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

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:
Commission Issues:

Orders@technologysource.com
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