



Welcome



Ron Hulett

**President
BTA Mid-America**





Lori McGowan

**Vice President of Sales
Office Equipment Group
GreatAmerica Leasing Corp.**



Rob Mitchem

**Sales Manager
Hytec Dealer Services**





Bob Goldberg

BTA General Counsel



TWENTY TRAITS OF A SUCCESSFUL DEALERSHIP



Bob Goldberg
312/648-2300

Bob.Goldberg@sfnr.com

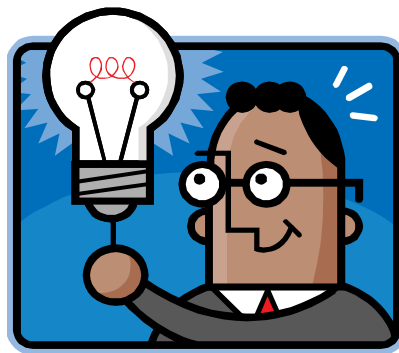
GPS GUIDANCE

Goldberg's Points for Success

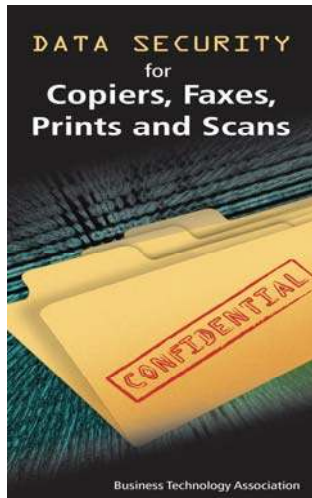


PLANNING

- Mission & Vision
- Business Plan
- Succession Plan
- Estate Plan



Data Security



- CBS Report
- Congress
- Federal Trade Commission
- Industry Summits
- 60% Unaware
- BTA Pamphlet
- Security is End User's Responsibility
- Profit Opportunity



DATA CLEANSING



- Misinformation
- Hard Drives 2002
- 20,000 Images Stored
- E-Mail Addresses
- IP Addresses
- Data/Images
- HIPPA, Gramm Leach, Sarbanes-Oxley, Privacy Act

LIABILITY

- Disclosure During Sales Cycle, Periodic Notices, End of Life.
- End User Responsibility:
- “END USER IS SOLELY RESPONSIBLE FOR THE REMOVAL OF ANY DATA AND/OR IMAGES RETAINED ON EQUIPMENT”
- Terms & Conditions, Maintenance, CPC, MPS, Leases Agreements.



SERVICES



- 18 Point Inspection
- Original Factory Settings
- Data Security Kits
- Data Wipe Dept. of Defense (DoD 5220.22M)
- Triple Reformat
- Single Reformat
- Hard Drive Removal
- Hard Drive Destruction
- Wholesalers

DATA CLEANSING OR HARD DRIVE REMOVAL AGREEMENT

Customer requests that _____ (Dealer) provide data cleansing or hard drive removal services to overwrite, reformat, or remove the hard disk drive(s) residing on the Customer Equipment listed below. _____ (Dealer) offers two options as listed below. It is understood that Customer is solely responsible for protecting and/or removing any confidential data/images stored or residing on any Customer Equipment. _____ (Dealer), under no circumstances, is liable for any damages including special, exemplary, punitive, incidental, or consequential damages, regardless of the claim, as the result of any information/data left on Customer's hard drive.

Equipment Make/Model Number _____
Number _____

Serial Number or _____ ID _____

(Attach Separate List for Additional Equipment)

Customer requests one or both of the following (check appropriate box):

☐ Manufacturer Hard Disk Drive Overwrite/Reformat Procedure

- Procedure includes the reformatting of the Equipment hard drive, network settings and (IP address, SMTP, DNS, etc.), and all fax, email and FTP destinations.
- Customer acknowledges that it is their understanding that any overwritten or reformatted information could possibly be recreated by a system or person with the proper expertise.
- Procedure and data cleansing assistance provided at no charge on Equipment being replaced with other _____ (Dealer) provided Equipment.
- Procedure and data cleansing assistance provided on Equipment not being replaced by _____ (Dealer) will be charged at \$ _____ per piece of Equipment.

_____ Pieces of Equipment x \$ _____ =

(Plus Applicable Taxes)

☐ Hard Disk Drive Removal and Replacement

- _____ will remove all hard drives from the Equipment and return to Customer.
- _____ will charge \$ _____ per piece of Equipment plus the price of the hard drive(s) needed to replace the removed hard drives. This will be done on any _____ (Dealer) provided Equipment being replaced by _____ (Dealer) provided Equipment.

_____ Pieces of Equipment x \$ _____ =

Hard Drive Replacement Cost _____
(Plus Applicable Taxes)

- _____ will charge \$ _____ per piece of Equipment plus the price of the hard drive(s) needed to replace the removed hard drives. This will be done on any _____ (Dealer) provided Equipment not being replaced by _____.

_____ Pieces of Equipment x \$ _____ =

Hard Drive Replacement Cost _____
(Plus Applicable Taxes)

- _____ will return hard drives to Customer and, at Customer request, provide the name of a company that can offer hard drive destruction services. Any hard drive destruction services desired would be strictly at the terms Customer and destruction service negotiate.

Customer Name _____

Office Systems, Inc.

DATA CLEANSING WAIVER

(Company Name)

("Customer") has been advised that data and/or images may be retained on the hard drive(s) of its equipment and hereby declines the services offered to erase and/or destroy said data and/or images. Customer assumes all liability for the disclosure of said data and/or images and holds _____ (Dealer) harmless from any and all claims, including attorneys fees and costs. Customer acknowledges its full responsibility for any damages and/or financial penalties which may be incurred.

By: (Print) _____ **Title:** _____

By: (Signature) _____ Date: _____

DATA SECURITY

- **State Legislation**

- Arizona
- Colorado
- Connecticut
- Florida
- New Jersey
- Oregon
- Washington



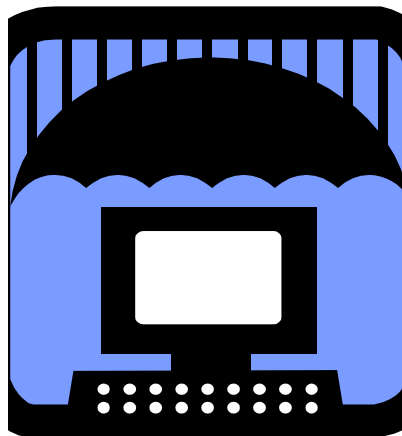
DEALERSHIP SECURITY



- Network Passwords,
Access. Remote
- Financial Safeguards
Banking
Accounts
Deposits
Credit Card
- Customer Information
Leases
Maintenance
Sales

CUSTOMER SECURITY

- Protect Inside the
Firewall
Accept
Decline
Network, Devices,
Internet



INDUSTRY CONSOLIDATION



- Company Name Emphasis
- Supplier As Competitor
- Dealer Meetings
- Rules of Engagement
- Proactive Communication with Manufacturer
- INDEPENDENT Dealer

MARKETING

- Differentiation
Service Force
- Communicate With End-Users
- Over Used:
Quality, CPC, MPS,
Response
- Focus on Savings
and Security
- Small Dealers
Disappearing



INVEST

- Technology
- Web Site
- Twitter
- Facebook
- Online



Legal Safeguards

- Pig Tales
- Lease Equipment
Storage
- Disclaimers
- Terms &
Conditions
 - Unavailability Parts
 - Unavailability
Supplies



WAIVER AND RELEASE OF LIABILITY

The undersigned has acquired from or through _____, ("____") a photocopier, printer, scanner, and/or facsimile machine that requires additional electrical service not delivered through normal electrical service. The undersigned has been advised of the requirement for upgraded electrical service both by _____ and through the specifications established by the manufacturer. _____ and manufacturer require an upgrade of additional electrical service for proper equipment performance and safety.

The undersigned hereby acknowledges the requirement of upgraded electrical service. The undersigned waives this requirement and assumes full responsibility for any damage to the equipment, electrical circuits, from fire, and/or injury to operators. The undersigned further agrees to release, save and hold _____ harmless from and for any and all claims, damages, or causes of action, including attorneys fees and costs, arising from or as a result of the equipment operation without the required electrical upgrade. Damage to the equipment due to inadequate electrical service is not covered under the _____ Service, Maintenance, or Support Agreement.

Date:

Company:

MANAGED ? SERVICES

- Manage Yes
- Service Yes
- Design Vehicle or Sell the Tires
- OEM Who?
- IT Based Dealership Device Management, Integration
- Clicks to Workflow
- Economy vs. Value
- VAR Partner/Acquisition



SPEED SELLS

- Hybrid Dealer
- Managed Services
- Streamline Processes
- Track Critical Information
- Moving Data
- Service
- Role of the Cloud



TRANSACTIONAL DOCUMENTS

- Terms & Conditions of Sale
- Cost Per Copy
- Supply Inventory
- Managed Print Services
- Remote Access
- Lease Equipment Storage
- Facility Management



MAINTENANCE AGREEMENTS



- Tailored to Individual Needs
- Paid Yearly, Quarterly, Monthly
- Cost Adjustments-Fuel, Parts, Supplies
- Automatic Renewal—Prevailing Rate--Window
- Time Blocks-Hours, Service, Help Desk
- Exterior Agents
- Exterior Hardware Damage
- Movement, Reinstall
- Non-Availability of Parts
- Non-Transferable
- Non-Refundable
- Past Due—No Service
- Removed Parts

LEASE COMPANY RELATIONS

- Master Agreement
Protection of Customer
Info—Approvals,
End of Lease,
Continuing
Obligations
- Approvals 65-75%
- Calling as End User



GOOD LEADERS

- Leadership Education
- Employee Education
- Clear & Regular Communication
- Respect Employees
- Recognize Contributions
- Motivate
- Coach



DELEGATION



- Management Development
- Roles
- Team Dynamics
- Compensate Results
- Saleable Business

EMPLOYMENT POLICES



- Harassment
Written Policy
100,000 Claims
36,000 Retaliation
- Background Checks
- Driving Record

GREEN



- Who Benefits?
- Energy
- Petroleum
- Paper
- Supplies

DISASTER PREPARATION



- Plan
- Back-Up Systems
- Communication

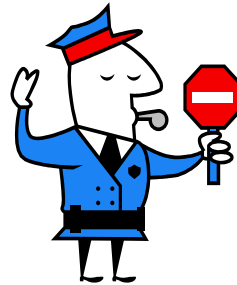
SELLING YOUR BUSINESS



- Only 1% of Small Businesses Sold
- Prepare For Sale
 - Books,
 - Receivables,
 - Inventory,
 - Upgrades
- Consultants/Formers Dealers
- Tax Considerations
- If you are not selling, you should be buying!

CRIMINAL CONDUCT

- Flexing
- Fraud
- 36 = 63 Months
- Inflated Value
- Forged Signatures
- Failure to Pay-Off Loan



JAPANESE EARTHQUAKE

- Point of Origin
- Ricoh 8 Plants
5 Out
3 Partial
- Products, Parts,
Supplies, Chips
- 2011 Programs
Waiver
- Product Allocation
- Back-Up Protection



QUESTIONS????



Bob Goldberg

312/648-2300

Bob.Goldberg@sfnr.com



**Break Time
Exhibits Open**

