

TWENTY TRAITS OF A SUCCESSFUL DEALERSHIP

BTA Southeast District Event



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DATA CLEANSING

- CBS
- End Users
- State Governments
- Congress
- Federal Trade Commission
- BTA



DATA CLEANSING



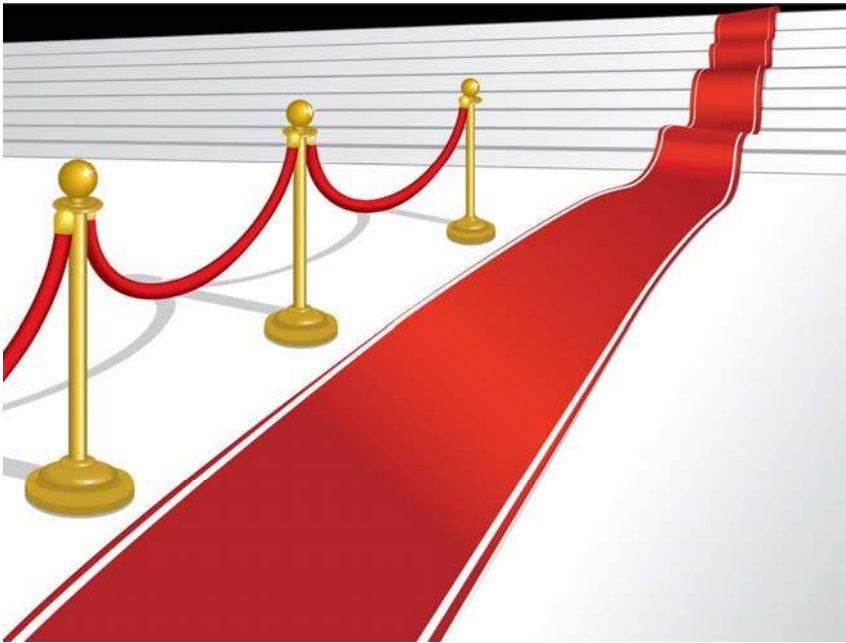
- Hard Drives 2002
- 20,000 Images Stored
- E-Mail Addresses
- IP Addresses
- Data/Images
- HIPPA, Gramm Leach, Sarbanes-Oxley, Privacy Act....

LIABILITY

- Disclosure During Sales Cycle, Periodic Notices.
- End 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

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)

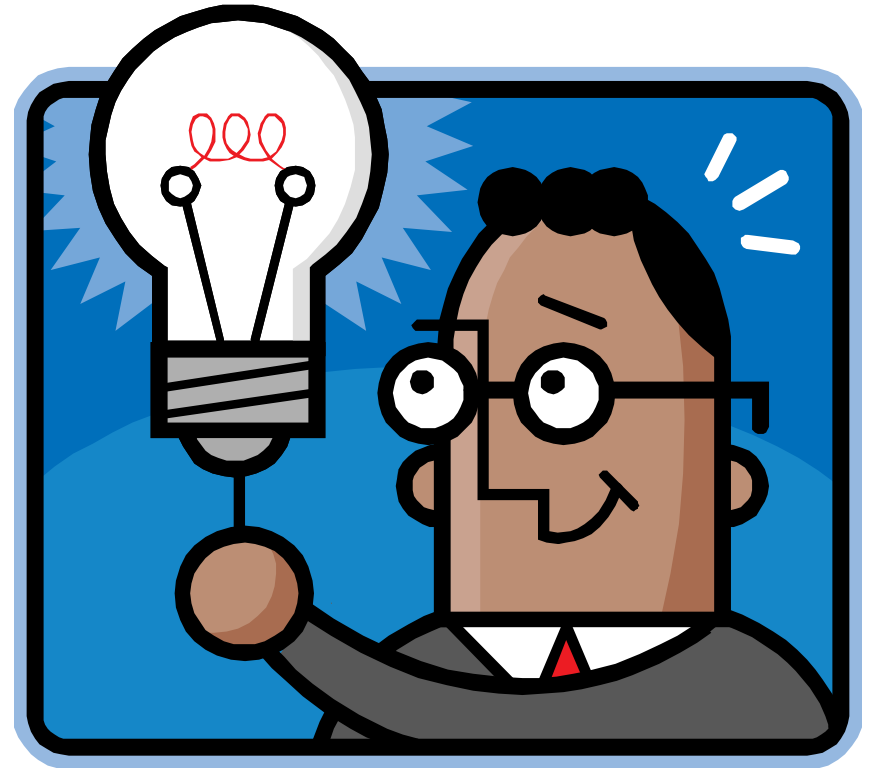
Title:

By: (Signature)

Date:

PLANNING

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



INVEST

- Technology
- Web Site
- Twitter
- Facebook
- Online



INDUSTRY CONSOLIDATION



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

MARKETING

- Differentiation
- Communicate With End-Users
- Over Used: Quality, CPS, MPS, Response



CUSTOMER BASE



- Service Distinguishes You
- Protectable Interest
- Non-Disclosure Agreements

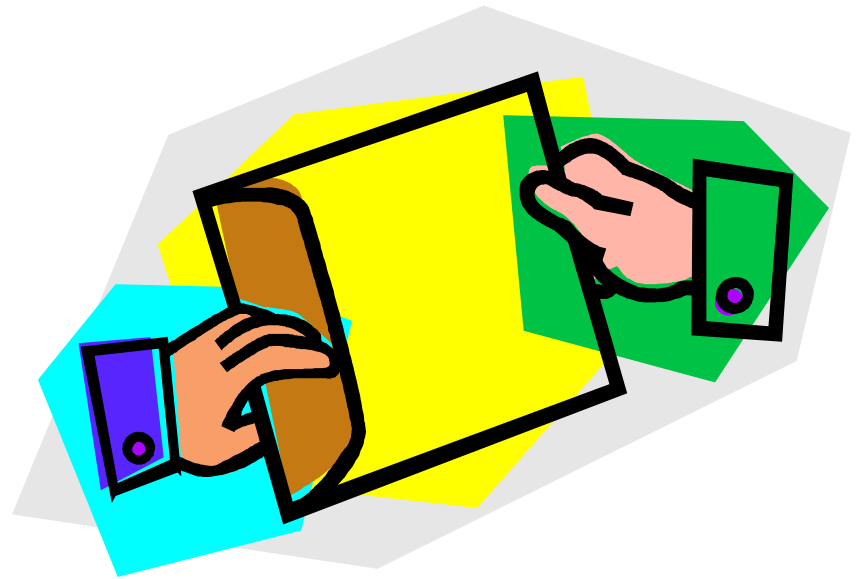
CUSTOMER TOUCHES

- Telemarketing
- Newsletter
- Service Follow-Up



PROPOSALS

- Confidential
- Evaluation Fee
- Response to RFP



AGREEMENTS

- **Manufacturer**
- **Secondary Suppliers**
- **End Users**



MARGINS

- Sacred Cows
- Industry Benchmarks



TRANSACTIONAL DOCUMENTS

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



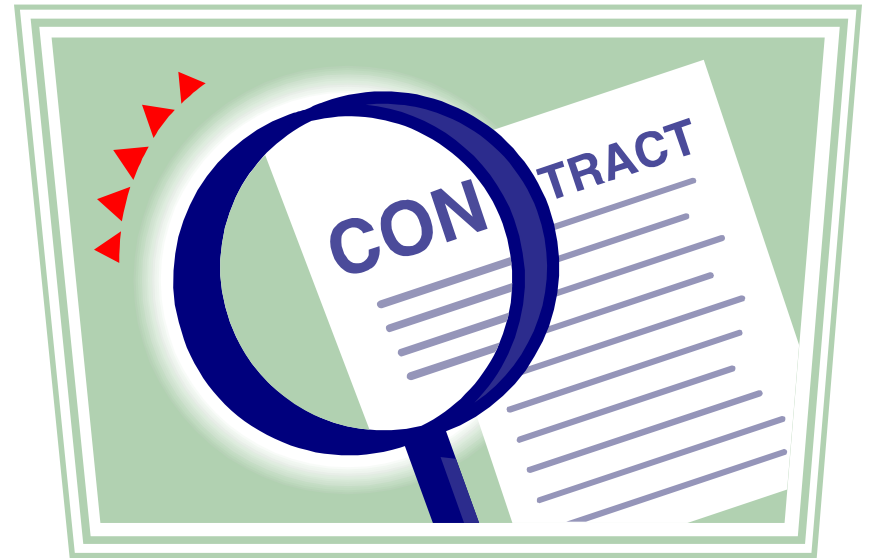
MAINTENANCE AGREEMENTS



- 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 COMPANIES

- GreatAmerica
- Master Agreement
 - Private Label;
 - Protection of Customer Base; Upgrade, Cancellations; Continuing Obligations.
- Brokered Transactions
- Calling as End User



VALUE ADDED SERVICES

- Census
- Manufacturer Based to Service Based



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

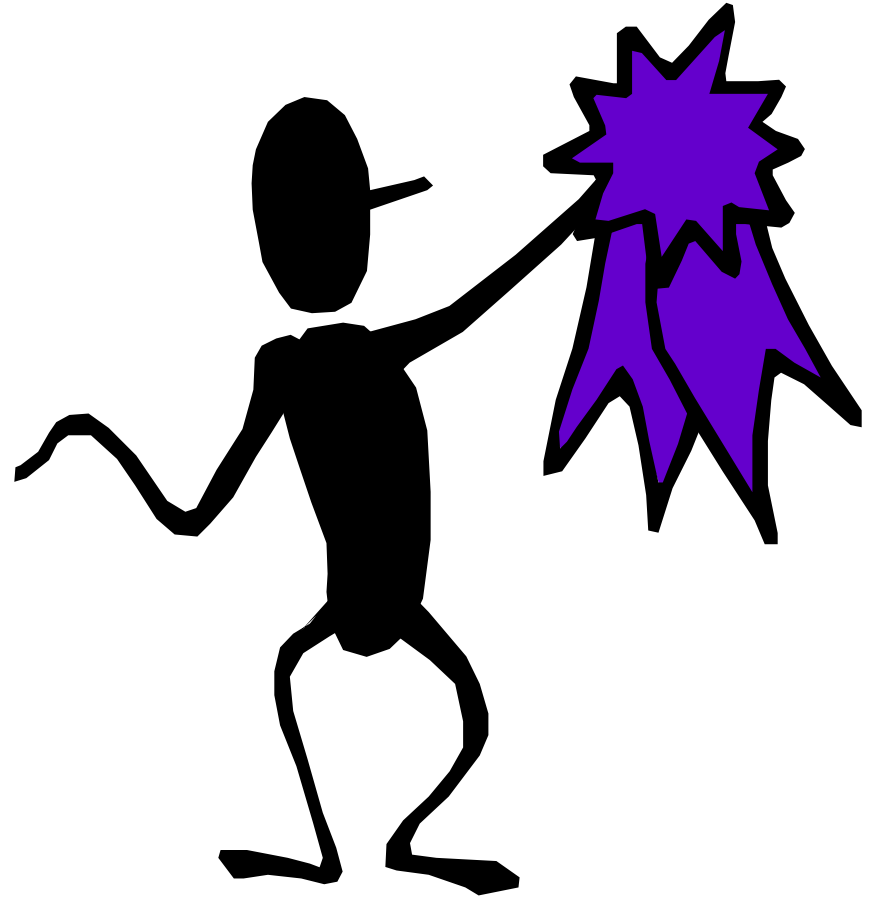
EMPLOYMENT POLICES



- Background Checks
- Non-Compete
- Non-Solicitation
- Cell Phone/PDA
- E-Mail/Internet
- Education Agreements
- Resignation/Termination

EMPLOYEE RECOGNITION

- Internal communication
Policy & Procedure
Manual, Newsletter,
Regular Meetings
- Thank You Notes
- Gift Certificates
- Family Photo
- Day Off
- Gas Card



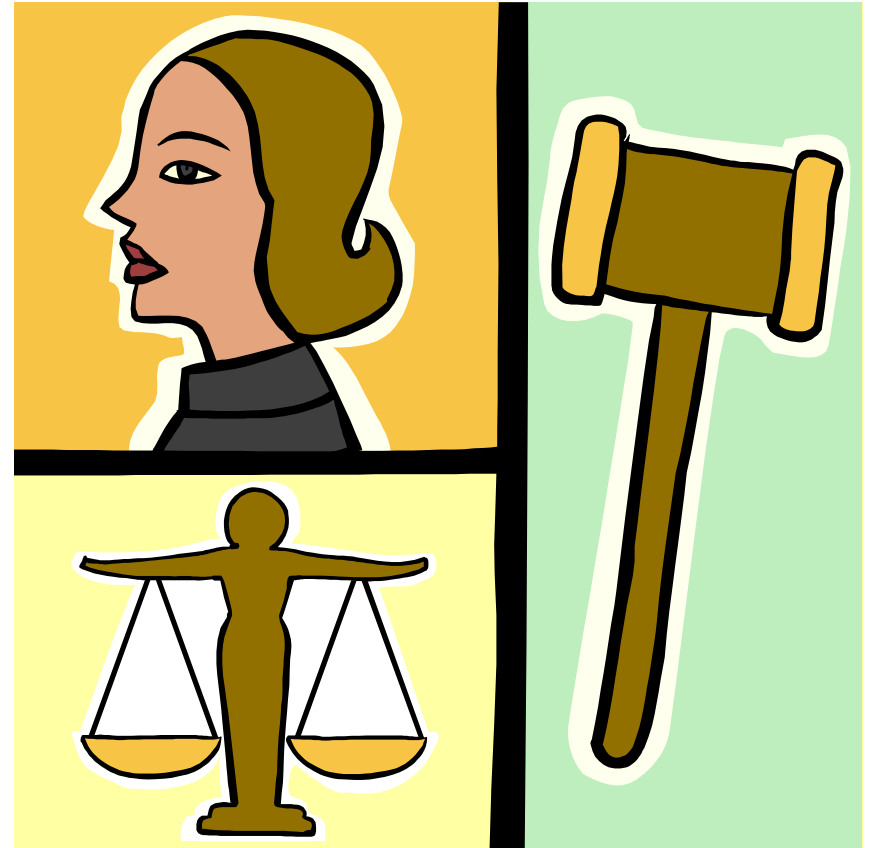
DISASTER PREPARATION

- Plan
- Back-Up Systems
- Communication



DISPUTE RESOLUTION

- Non-Litigious Approach
- Mediation
- Arbitration
- Litigation



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!

QUESTIONS????

BTA SOUTHEAST DISTRICT EVENT



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