

VisualSolv™ **CollabSolv™**

ExecConnect



WELCOME BACK



Sandi Stambaugh

Senior Vice President
Vendor Business
Management

TD SYNEX



Tommy Plumer

VP Sales,
Marketing/
Communications

TD SYNEX

VisualSolv™ **CollabSolv™**

ExecConnect



Day One Recap

AV MARKET, MACRO ECONOMY AND TECH TRENDS



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SAMSUNG



Gabe Dominguez

Director
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Partners

SMART TECHNOLOGIES

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SMART TECHNOLOGIES

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More Than Distribution
**YOUR PARTNER FOR
STRATEGIES IN
FINANCIAL OPERATIONS**



Tommy Plumer

VP Sales,
Marketing/
Communications

TD SYNnex

A background image showing a close-up of two hands shaking in a firm grip, symbolizing a business deal or agreement. The image is overlaid with a dark teal gradient.

**Let Our
Money
Work
For You.**

Our Mission

To deliver value-added payment solutions through the technology partner ecosystem to facilitate accelerated growth and profits.

Let Our **Money** Work For You.

Supply Chain Environment

- *Interest Rates* – “Higher for Longer” – finally relaxing
- *Wider Credit Spreads* – making it more difficult for business to borrow from banks.
- *Longer Cash Conversion Cycles* - end users are negotiating longer payment terms so they can avoid borrowing more debt.
- *Reduction in OEM channel subsidies* - reduced or cancelled subsidies once offered by flooring companies.

Opportunity:

- To fill the financing gap and support the channel with working capital by offering longer invoice terms.

Standard Credit Offerings

- ❖ Net Terms Account that revolves with customer purchases. Static invoice terms.

Amplify Extended Terms

- ❖ Net Terms Account that revolves with customer purchases BUT with the ability to extend orders up to 120 days in increments of n45/ n60/ n75/ n90/ n120.

TDS Capital Bridge (short term)

- ❖ End customer is looking for short term solution. From 150 days to 12 months. Either paying in full or looking to make installments

TDS Capital

- ❖ Long term financing 12-60 months. Monthly/Quarterly/Annual installments. Lease or loan options. Multi-vendor. White label available. Soft cost, and non-TDS product okay.

AMPLIFY



Amplify Program Overview

- Extended terms program: Pre-approve Partners up to n120.
- Vendor participation via matching terms.
- Uncouple product pricing from the cost of extended terms.
- Automated in CIS, Webquote, and ECExpress.
- Uses existing terms account.
- 1pg Addendum + Security Agreement.
- Embedded Early Pay Discount offer.
- Auto Debit with commonized due dates: 5th, 15th, 25th.
- CommunitySolv members bump 1 level within the program for lower rates.

Primary Use Cases

- End User requesting **extended terms**.
- Strategic **inventory purchases/ configuration** requirements.
- Pulling forward deals (including vendor driven) to **lock in price**.
- Improving **deal margins**.
- Maintain **sales velocity**.

What are the customers saying?

- ~500 Partners enrolled since Jan 1st.
- \$200M+ transacted.
- More than 2000+ orders processed.
- Average extension is 30-45 days.

Example – Invoice Extension & Early Pay Discount

Invoice Extension					
		< \$1M	\$1-5M	\$5-15M	\$15M+
Order Amount --> \$ 15,780.24					
Ex 1	Base n45				
	Amp n60	0.60%	0.53%	0.49%	0.49%
	Amp Fee	\$ 94.03	\$ 84.31	\$ 77.82	\$ 77.82
Ex 2	Base n45				
	Amp n75	1.19%	1.07%	0.99%	0.99%
	Amp Fee	\$ 188.07	\$ 168.61	\$ 155.64	\$ 155.64
Ex 3	Base n45				
	Amp n90		1.66%	1.48%	1.48%
	Amp Fee		\$ 262.64	\$ 233.46	\$ 233.46

Early Pay Discount					
Order Amount --> \$ 15,780.24					
Ex 1	Base n45	35	15		
	Paid by	10 days	30 days		
	EPD \$	\$ (48.23)	\$ (24.11)	\$ -	\$ -
	EPD %	-0.31%	-0.15%	0.00%	0.00%
	Effective Rate	-2.48%	-1.24%	0.00%	0.00%
Ex 2	Amp n90	75	45	15	
	Paid by	15 days	45 days	75 days	
	EPD \$	\$ (96.46)	\$ (72.34)	\$ (24.11)	\$ -
	EPD %	-0.61%	-0.46%	-0.15%	0.00%
	Effective Rate	-2.48%	-1.86%	-0.62%	0.00%

Example - ECExpress

Payment Method

Select Payment Method *

AMPLIFY NET 75

Bill-to:

AMERICAN EXPRESS
AMPLIFY NET 75
AMPLIFY NET 90
AMPLIFY NET 120
DISCOVER
MASTERCARD/VISA
NET 30
PREPAY CASH/CERTIFY
WIRE TRANSFER

Billing Contact:

XXX DO NOT SHIP XXX

Selected Amplify finance option:
(From the 'Select Payment Method' dropdown menu)

✓ Amplify - Net 75 Fee: \$9.19

Amplify - Net 90 Fee: \$18.36

Amplify - Net 120 Fee: \$39.78

This will appear as a 'Finance' line item on the checkout: Order Review page.

Example - ECExpress

Microsoft Edge

Shop TD SYNnex Deal Den New Age SERVICESolv MobilitySolv RENEWSolv StreamOne Stellr Account - [REDACTED] ★ Favorites/Saved Cart - Feedback EN - Log Out

TD SYNnex **ECExpress** Products Product Keywords

Help Chat Match all words Find Multiple Part# In Stock Only Show Any Warehouse stock Exclude Refurb Product

Categories Product Finders Manufacturers Orders / Quotes Dashboards eRMA eServices End Customers Admin / Report

Credit info > Credit Detail

Credit Detail

Account#	Customer Name	Term	Credit Limit	Current Balance	Current Pending	Avail Credit	Last Payment	Last Pay Date
[REDACTED]	[REDACTED]	NET 60 DAYS	[REDACTED]	\$46,628.18	\$22,677.71	[REDACTED]	\$5,479.78	11/02/2023

Default Bill-to: [REDACTED]

Credit Rep: Johnnie Edmond
Email: johnnie.edmond@tdsynnex.com
Phone: 864.318.1111

Credit Analyst: Bradley Womack
Email: bradley.womack@tdsynnex.com
Phone: [REDACTED]

Upcoming Amplify auto-debit dates: 11/15/2023 | \$5,479.78 Details 11/25/2023 | \$5,517.54 Details 12/05/2023 | \$0.00

Open Invoices Invoice History Filter by PO#

42 items. Status All Open Payment Processing

PO#	Order#	Invoice	Invoice Date	Due Date	Order Total	Open Amount	Due Amount	Discount Amount	Pay Amount	Comments
544977	144007347	144007347	09/21/2023	11/05/2023	\$4,134.82	\$0.00	\$4,134.82			Too close to Auto Debit Date.
545423	144008341	144008341	09/21/2023	11/05/2023	\$719.96	\$0.00	\$719.96			Too close to Auto Debit Date.
TECHSELECTQ3 2023	144071151	144071151	09/22/2023	11/06/2023	\$625.00	\$0.00	\$625.00			Too close to Auto Debit Date.
ConnectWise - Sept 23	4289673	4289673	09/27/2023	11/11/2023	\$5,058.80	\$0.00	\$5,058.80			Too close to Auto Debit Date.
545763	144322512	144322512	10/02/2023	11/16/2023	\$228.05	\$228.05	\$0.00			Too close to Auto Debit Date.
545763	144322900	144322900	10/02/2023	11/16/2023	\$230.69	\$230.69	\$0.00			Too close to Auto Debit Date.
546717	144568083	144568083	10/11/2023	12/10/2023	\$574.28	\$574.28	\$0.00	\$0.86	\$ [REDACTED]	
	4379527	4379527	10/19/2023	12/18/2023	\$1,735.50	\$1,735.50	\$0.00	\$5.38	\$ [REDACTED]	
	4379528	4379528	10/19/2023	12/18/2023	\$243.81	\$243.81	\$0.00	\$0.76	\$ [REDACTED]	
	4379529	4379529	10/19/2023	12/18/2023	\$2,073.20	\$2,073.20	\$0.00	\$6.43	\$ [REDACTED]	
	4379530	4379530	10/19/2023	12/18/2023	\$97.90	\$97.90	\$0.00	\$0.30	\$ [REDACTED]	
	4379531	4379531	10/19/2023	12/18/2023	\$0.81	\$0.81	\$0.00	\$0.00	\$ [REDACTED]	

PO# Order# Invoice Invoice Date Order Total

544977	144007347	144007347	09/21/2023	\$4,134.82
545423	144008341	144008341	09/21/2023	\$719.96
TECHSELECTQ3 2023	144071151	144071151	09/22/2023	\$625.00
				\$5,479.78

Cancel Download

PO# Order# Invoice Invoice Date Order Total

ConnectWise - Sept 23	4289673	4289673	09/27/2023	\$5,058.80
545763	144322512	144322512	10/02/2023	\$228.05
545763	144322900	144322900	10/02/2023	\$230.69
				\$5,517.54

Cancel Download

Let Our Money Work For You.

Amplify@tdsynnex.com

Example

LN #	QTY	PART NUMBER/DESCRIPTION	SKU #	VENDOR PART #/UPC CODE CUSTOMER PART #	UNIT PRICE	EXT NET PRICE
1	1	NTL-INOUTCAM-W NEST IN OUT CAMERA BATTERY WHI	6315045	GA01317-US 193575008240	\$143.84	\$143.84
SN: 34281J3D53LK0K						
Merchandise Total:					\$143.84	USD
AMPLIFY CHARGE:					\$0.72	USD
Comment: Tracking NO:640562334410						
Invoice Total:					\$144.56	USD



RECEIVABLE SERVICE AGREEMENT

Introducing RSA

- *Transaction based program that provides an end-to-end credit, billing, and collection service to help manage credit risk of large transactions.*
- *Can be invisible to the End User*
- *Ability to use in parallel with net terms and Amplify*

Benefits

Credit Reach:

Credit approval based on end-user credit.

Mitigate Risk:

TD SYNnex assumes credit risk of an End User financial default.

Carve Out Limit:

RSA/FSA billings are on an EU payer account, separate from open terms account.

Outsource:

Shift billing and collecting activities to TD SYNnex.

Application Process

- TD SYNnex RSA or FSA contract
- Partner Financials
- Fees: 1% of PO min \$300 and max \$1200
- Funding Requirements:
 - ✓ Partner purchase order
 - ✓ Firm End User purchase order
 - ✓ PMSI filing specific to transaction
 - ✓ Assignment of payments via RSA/FSA agreement

Amplify Team



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A background image showing a close-up of two hands shaking in a firm grip, symbolizing a business deal or agreement. The image is overlaid with a semi-transparent teal circle and a teal gradient filter.

TD SNNYNEX CAPITAL

TD SYNEX Capital Overview

Who?



The captive financing arm of TD SYNEX

- Price and structure our own deals
- Issue our own contracts
- Service the portfolio internally
- Leverage portfolio data

What?



Offer flexible financing options to partners and end customers

- Dedicated sales, operations and business teams
- Integrated selling motion with product marketing and sales teams

Why?



To give our partners more opportunities to succeed

- Increase credit capacity
- Reduce risk
- Accelerate cashflow
- Promote sales growth
- Manage the customer experience

Solutions

Types of Transactions

Leasing

Installment payment agreements

100% SW & services

Everything-as-a-Service

Managed services

Subscription/consumption/DaaS



How We Deliver

- 12 to 60-month terms
- Monthly, quarterly, annual payments
- Custom payment structure
- No minimum deal size
- 1st payment deferrals of 30/60/90 days
- Documentation
 - Stand alone docs
 - Electronic delivery



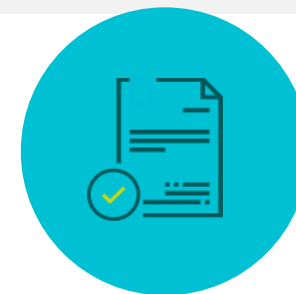
Solutions For...

Commercial, enterprise, midmarket, SMB, Security

State & local governments, universities, school districts

Federal agencies

United States and Canada



Custom Programs

Private label, co-branded, or TD SYNnex Capital

Programmatic or transactional

Vendors/resellers
Communities
Solv programs

All products and solutions, regardless of acquisition point



Let Our **Money** Work For You.

The Power of Payments: *Grow Your Deal*



Let Our **Money** Work For You.

15 Devices

15 Seats of Office 365

Customer-Led
Deployment Services for
All Units

15 Device Bags

Additional 15
Upgrades to ADP

Upgraded ProSupport
Services for All Devices

15 Power Convertors for
Mobile Workers

30 Monitors Added



Budget-Friendly Payment Solution



Solution Under Their Branding



**A bundled solution for their Hardware,
Software and Services**

Customer Budget:

\$50,000

Original Solution Value:

\$60,000

Margins, Services, Upgrades:

\$20,000

Total Upsold Cost:

\$80,000

36 Month Installment Payments with TD SYNnex Capital

\$2,331/month (\$28k annually)

Annual Budget Retained:

\$22,000

Do You Have a Financing Opportunity?

“I don’t have enough budget for this project.”

“I need to preserve my cash for other projects.”

“I’m worried about the economy.”

“This project is being pushed out until next year.”

“I need to pay for this annually.”

“Are there any additional discounts available?”

“We can’t afford this.”

“I’m not ready to refresh right now.”

Let Our **Money** Work For You.

What's Needed to Quote?



Which reseller
are you working with?



Legal name and address
of end-user



Total client cost
and bill of materials




Contract terms
duration and payment

Let Our **Money** Work For You.

Questions? Contact
TDSYNnexCapital@tdsynnex.com

Custom Programs and Support

- 
- Marketing Campaigns
 - Promotional Opportunities
 - Event Collaboration
 - Private Label and Co-Branding
 - Programmatic or Transactional
 - Playbooks
 - Sales Battlecards
 - Digital One-Pagers and Datasheets

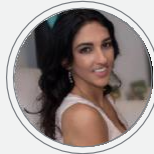
Let Our **Money** Work For You.



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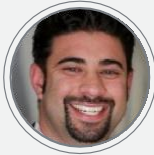


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Lean In Session

UTILIZING FINANCIAL VEHICLES TO MAXIMIZE PROFITABILITY



Laura Watson

CFO

CCS PRESENTATION
SYSTEMS



Matt Waidley

Director of Sales,
Distribution

LG



Matt Brungardt

Channel Sales Director -
AMER Distribution

NEAT



Kathleen Blackmon

VP of Channels and
Distribution

JABRA

VisualSolv™ **CollabSolv™**

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TD SYNEX EXECUTIVE UPDATE



Reyna Thompson

Incoming President North
America

TD SYNEX

TD SYNnex EXECUTIVE UPDATE



Reyna Thompson

Incoming President North
America

TD SYNnex

VisualSolv™ **CollabSolv™**

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Best Practices In **RECRUITMENT, TALENT MANAGEMENT, LEADERSHIP AND RETENTION**



Tom LeBlanc

NSCA

Our Industry's Signature Challenges

- **Talent Recruitment**
- **Retention**
- **Leadership Development**


A Little Bit About NSCA

- NSCA is the leading not-for-profit association representing the commercial systems integration industry.
- NSCA provides benchmark studies on labor units, economic reports, vertical market trends, technology adoption, regulations and codes, etc.
- NSCA provides great education and networking platforms with our Business & Leadership Conference and XBO Experience
- NSCA is ... Your voice, Your business resource, Your trusted advisor.

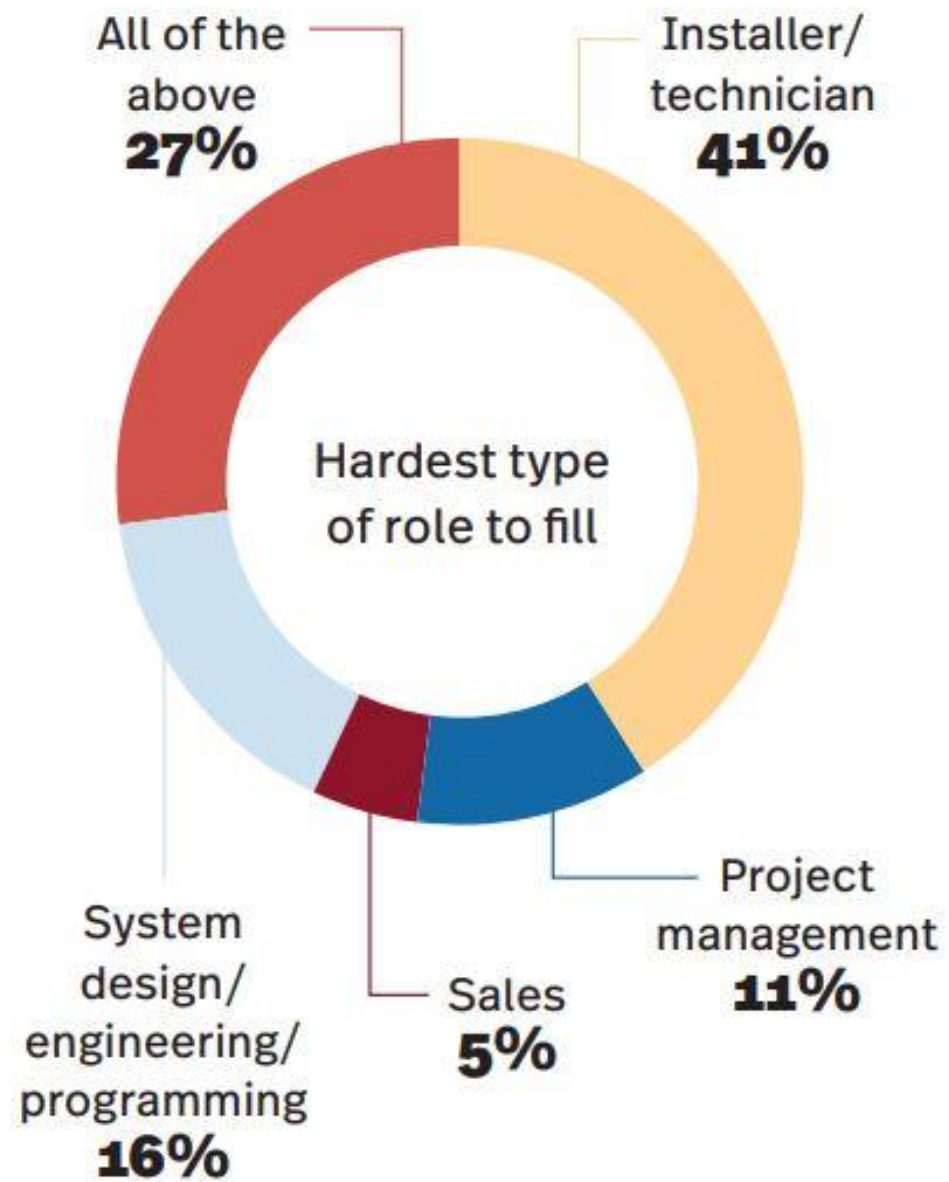


Tom LeBlanc
NSCA Executive Director

“What Is Your
Company’s No. 1
Business Challenge?”



Lack of qualified
job candidates!!!!!!



Source: CI/SSI/NSCA State of the Industry 2024 Report

NSCA's Financial Analysis of the Industry

Challenges for 2024

Another qualitative metric collected in the survey involves anticipated challenges for 2024.

The open-ended responses cover a wide spectrum of operational issues, but three common themes were found.

1. Staffing

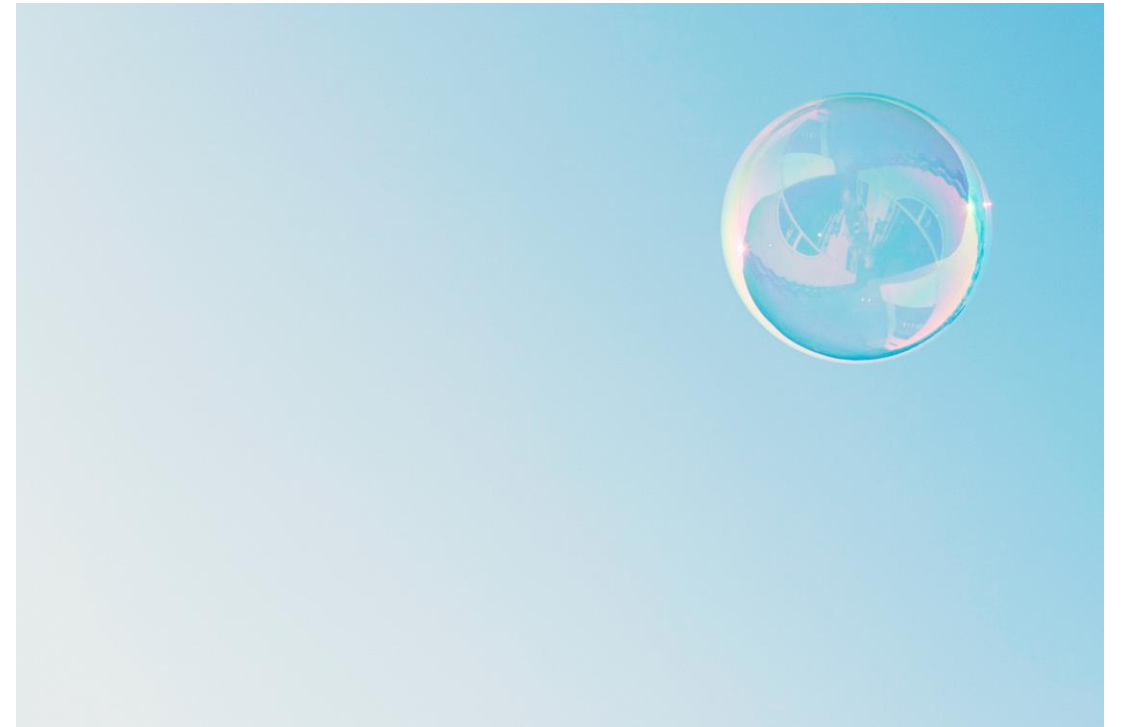
This was the most frequently mentioned theme, whether in the form of struggling with hiring or retention. Overall, companies can't find the staff they need to support business—or to sustain growth.

Example: *"Getting to all of our projects in a timely manner heavily depends on our labor force. Finding new people who are qualified, capable, and reliable is a huge challenge."*

Talent Recruitment

Does the Integration Industry Exist in a Bubble?

- We all know about the great career opportunities
- But most other people have no idea this rewarding industry exists
- What do your friends and family think that you do?
- Nobody outside of our industry bubble would consider a career in something called “integration” ... because they don’t quite know what it is.



Therein lies the problem

This Is Why NSCA Launched Ignite

- It's because of that bubble that NSCA launched its Ignite program
- Ignite creates a network of “ambassadors” (integration companies) that go outside the bubble to local schools and events to educate young professionals or students about this industry
- These ambassadors can use the Ignite framework to create summer internship programs to get new talent in the door

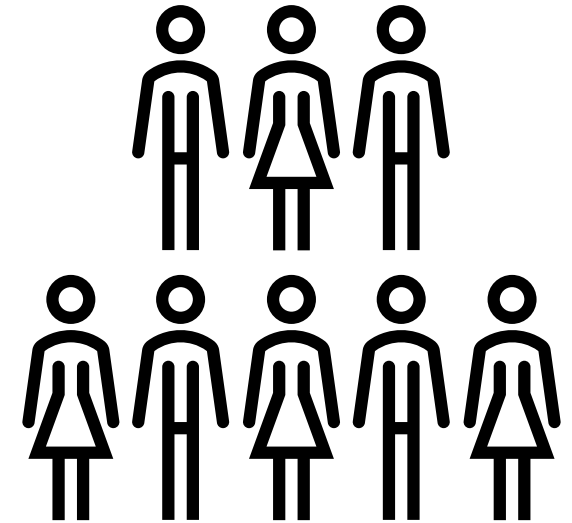


Visit [IgniteYourCareer.org](https://igniteyourcareer.org)

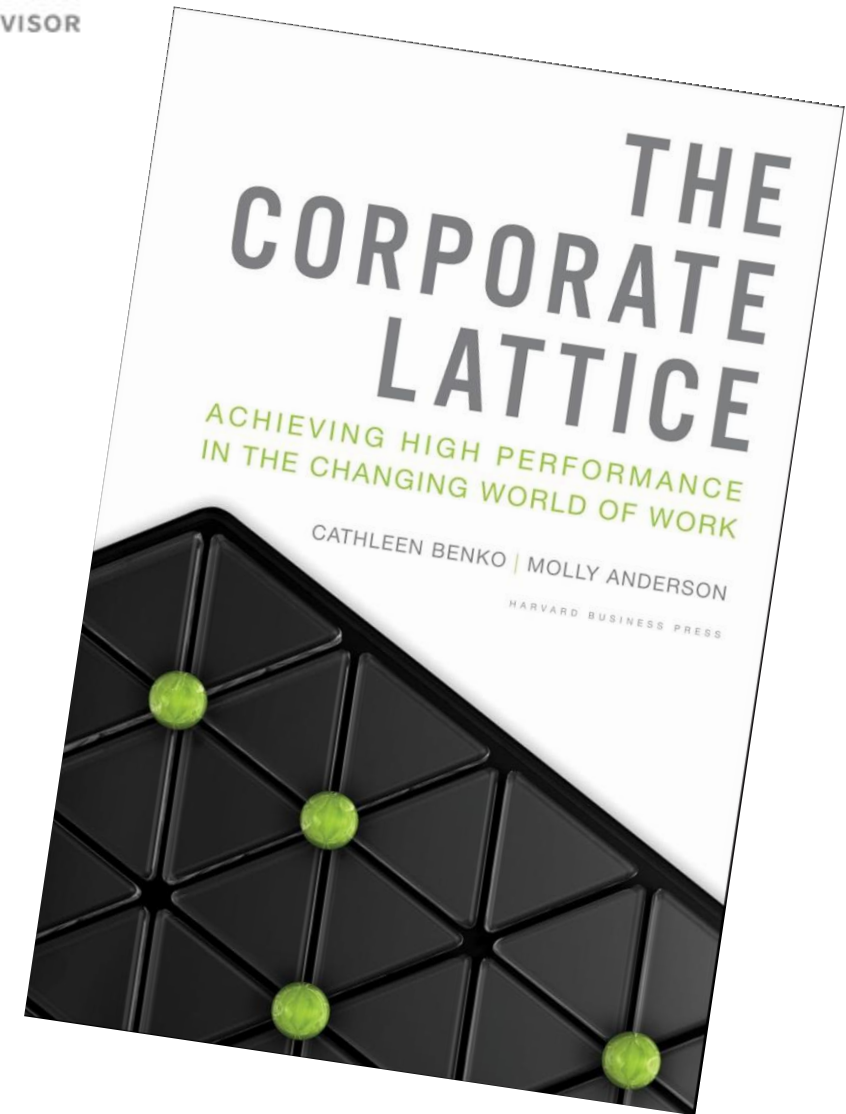
Talent Retention

What Causes Retention Challenges

- Restrictive growth and impossible movement
- Inability to change responsibilities or shift role for new job experience within company
- Lack of time for additional development and training for growth
- Comfortability level for communication to upper management, or lack there of
- Leadership follow-through on promises and deliverables, goes both ways
- Accountability from leadership and from self to team – building or hindering trust



- Cathleen Benko spoke at NSCA's Business & Leadership Conference
- NSCA has since consulted companies on embracing a corporate lattice strategy
- Our industry is plagued with top employees jumping from company to company
- Need strategies for retaining our A-players
- Corporate lattice is about recognizing when top performers aren't ideal or satisfied in their current position
- It's about a business plan that allows great employees to move not just vertically but laterally
- It's not about taking a salesperson and popping them into project management
- It's about TRAINING top people for the positions in which they'll thrive and stay with the company



Retention Challenges/New Reality

Percent of Staff Working Remote or Hybrid

		Responses	0%-25%	26%-50%	51%-75%	76%-100%
Management/Executive	Management/Executive	102	69.6%	11.8%	4.9%	13.7%
Administrative	Admin Working Remote or Hybrid	100	71.0%	13.0%	7.0%	9.0%
Technical	Technical working Remote or Hybrid	101	71.3%	14.9%	5.0%	8.9%
Sales	Sales working remote or hybrid	100	50.0%	14.0%	11.0%	25.0%

Sneak Peek at NSCA's new Compensation & Benefits Report

Retention Challenges/New Reality

Likelihood of issues with new hires requiring remote or hybrid

	Responses	Not Likely	Somewhat Likely	Very Likely	Extremely Likely
Management/Executive	103	68.0%	9.7%	4.9%	2.9%
Admin	103	58.3%	14.6%	5.8%	3.9%
Technical	104	62.5%	17.3%	5.8%	3.8%

Sneak Peek at NSCA's new Compensation & Benefits Report

Retention Challenges: Do Your Benefits Match Up?

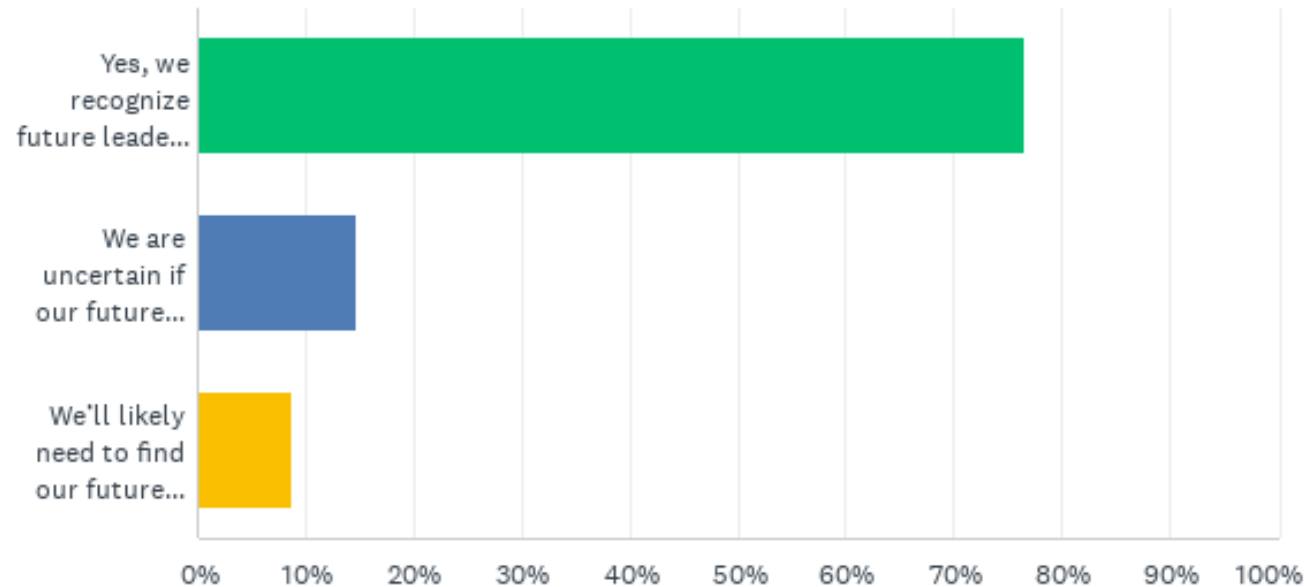
Benefits offered

	Available to all or some full-time employees	Available to all or some part-time employees
Health insurance	78.0%	17.1%
Dental insurance	86.8%	12.3%
Life insurance	80.5%	19.5%
Vision plan	79.2%	12.3%
Short-term disability	53.7%	12.2%
Long-term disability	65.1%	14.2%
Annual bonus (non-sales based)	79.2%	26.4%
Sign-on bonus	15.1%	26.4%
Retirement plan/pension (any type)	82.1%	27.4%

Sneak Peek at NSCA's new Compensation & Benefits Report

Leadership Development

Q1 Thinking about your company's current leadership (e.g. executives and directors), do you feel like your company's future leadership currently works at your company?

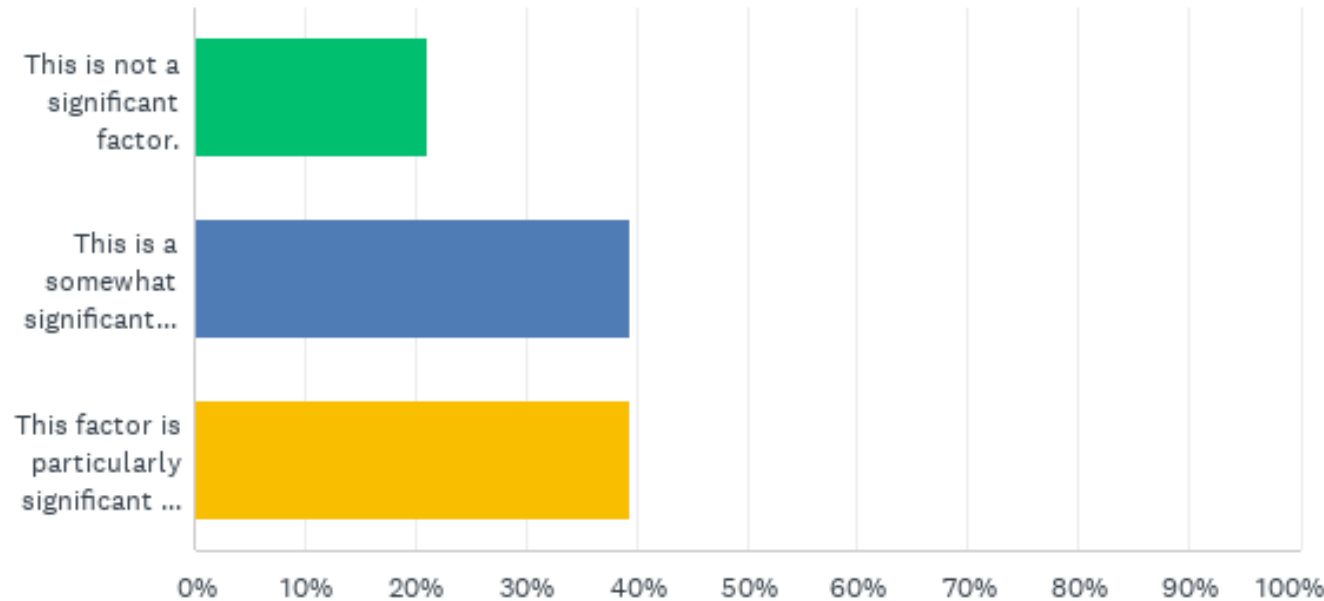


How to identify future leaders?

- What skills/knowledge/abilities are needed for the role
- Do their vision/values connect with the organization?
- Is the person interested in leading or taking over?
- Are they better at being an individual contributor?
- Why do they want to lead or take the next step?



Q6 To what extent do you think a generation gap (e.g., the ethos and values of Boomers vs. the ethos and values of Millennials/Gen Z) makes leadership transition within our industry more difficult?



▼ Being good at matching team members' interests with roles and responsibilities within the company	64.71%
▼ Learning how to overcome setbacks/challenges and continuously move forward	76.47%
▼ Adapting quickly to rapidly changing situations	70.59%
▼ Adopting best practices for customer-facing communications	76.47%
▼ Situational awareness, assertiveness, and difficult conversations	79.41%
▼ Spotting and avoiding disruptive behaviors and situations	47.06%
▼ Resolving conflict and tapering unproductive exchanges	73.53%
▼ Problem solving methods and documentation best practices	64.71%
▼ Project managing multiple job tasks and activities	58.82%
▼ Identifying constraints and bottlenecks in general workflow/processes	73.53%
▼ Transforming big ideas into smaller executable steps and results	73.53%
▼ Amplifying your company's brand through confidence in your solutions	41.18%
▼ Understanding the value of documented workflows and processes	67.65%
▼ Communicating solutions for complicated problems to the non-technical client	61.76%
▼ Making the transition from peer to manager (friend to employer)	64.71%
▼ Avoiding the fear of making mistakes	61.76%
▼ Ethics, integrity and honesty with ourselves and others	64.71%

Preparing next-gen talent for integration leadership positions



XBO EXPERIENCE 2024

Nov. 12-13

Atlanta | Georgia Tech





Thank You!

Visit [NSCA.org](https://www.nasca.org) to learn more about NSCA's Resources

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Lean In Session

MAXIMIZING PARTNERSHIPS, TALENT AND CULTURE TO DRIVE NEXT LEVEL GROWTH



Gilbert Gonzalez

CEO and Founder
MISSION CRITICAL
SOLUTIONS



Crystal Hale

Global Distribution
Manager
ZOOM



Betsy Larson

SVP
SHARP



Tom LeBlanc

Executive Director
NSCA



Patrick Mead

Sr. Distribution Account
Manager
LEGRAND AV

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Keynote Presentation

HOW TO DIFFERENTIATE YOUR BUSINESS BY BUILDING A STORYBRAND



**April Sunshine
Hawkins**

STORYBRAND

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