![d-tools System Integration Software logo]

D-TOOLS I3 PARTNER SUCCESS GUIDE

BEST PRACTICES & CHECKLIST TO ACHIEVE GREATER BENEFITS FROM YOUR PARTICIPATION IN THE **D-TOOLS I3** *(INDUSTRY INFORMATION & INSIGHTS)* PARTNER PROGRAM
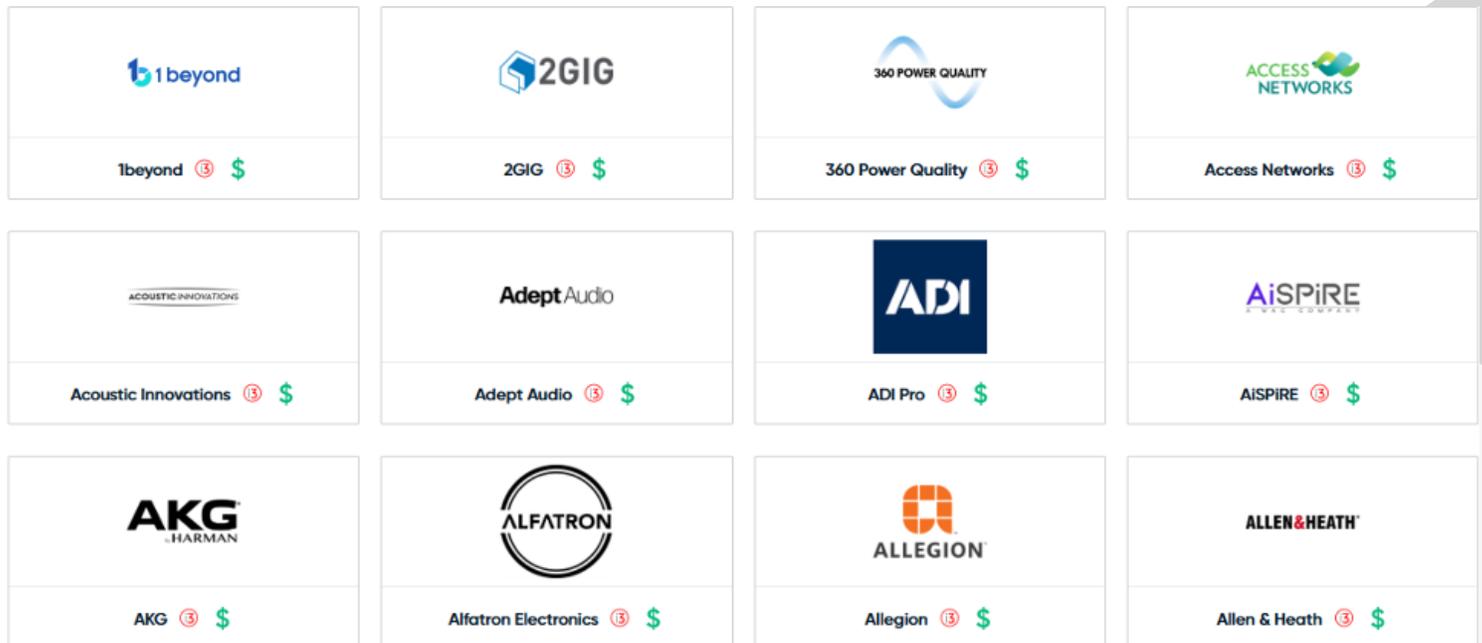
MAY 2024

I3 Partner Best Practices Checklist

- ✅ Deliver and the Update Products and Pricing in D-Tools Integrated Product Library
- ✅ Set Unique Pricing for Integrators by Tier
- ✅ Approve Dealer Authorization Requests ASAP for Best Customer Experience
- ✅ Set Up API Integration for Real-Time Pricing (optional, but preferred)
- ✅ Subscribe to INSIGHTS+ Dashboard
- ✅ Obtain Access for Necessary Internal Team to Dashboard
- ✅ Get Internal Team Trained on How to Analyze Dashboard
- ✅ Check INSIGHTS+ Dashboard Daily/Weekly/Monthly
- ✅ Schedule Quarterly Consultation Call with D-Tools Team
- ✅ Send Regular Communications About the Free D-Tools Cloud Solo Plan to your Reseller Base
- ✅ Contribute Product Releases, Company News, and Other Information in the D-Tools Monthly Newsletter
- ✅ Attend Monthly i3 Webinars

D-Tools i3 Partner Program – A True Partnership

D-Tools Industry Information & Insights (I3) Program was established in 2018 with the mission to be the preeminent provider of objective, actionable industry information and insights for the electronic systems industry.

Over the past six years, the program has provided suppliers, integrators, associations, investors and others with detailed data analytics on the electronic systems industry. The technology platform aggregates, curates, and distributes product and pricing information from 2,500+ users of D-Tools Cloud and delivers it to participating i3 Partners to help you record results, identify trends, establish projections, gain competitive advantages, make business decisions, and much more. To date, there are more than 340 companies and more than 1,200 brands in the i3 Partner Program.

1beyond ③ $	2GIG ③ $	360 Power Quality ③ $	Access Networks ③ $
Acoustic Innovations ③ $	Adept Audio ③ $	ADI Pro ③ $	AiSPiRE ③ $
AKG ③ $	Alfatron Electronics ③ $	Allegion ③ $	Allen & Heath ③ $

Use this i3 Partner Success Guide to Maximize Your Partnership with D-Tools

This D-Tools i3 Partner Success Guide offers a Best Practices Guide & Checklist to help you maneuver through the ever-changing landscape of the electronic systems industry. Being a partner of D-Tools is more than just an alliance between our companies. It's a proven asset for your business and a layer of customer service for your dealers (integrators, consultants, accounts, resellers, etc.). If you are a manufacturer, it also extends to your distributor partners. At its root, this relationship is about making sure that your product data and pricing are accurate, current, and complete for the resellers of your products.

The success of your partnership starts with you. We are here to facilitate a successful partnership and want to provide some "best practices" to aid in that. Remember that we are striving for the same goal: to make it as easy as possible for our combined customers to do business with whom they want and how they want, in an optimum environment.
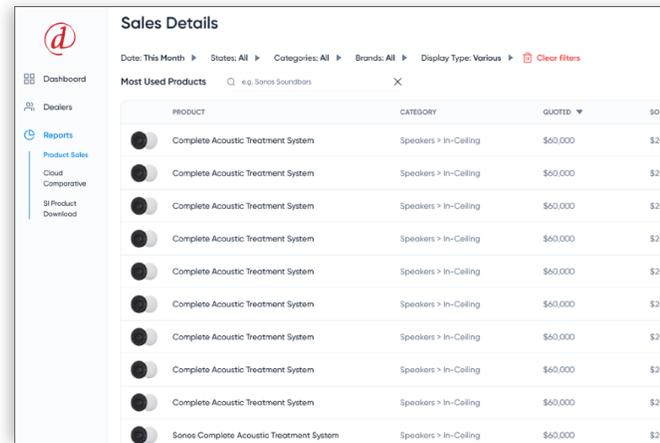
i3 Partner Best Practices

There are several best practices advisable for i3 Partners.
Here are some ideas we have gleaned over the past several years.

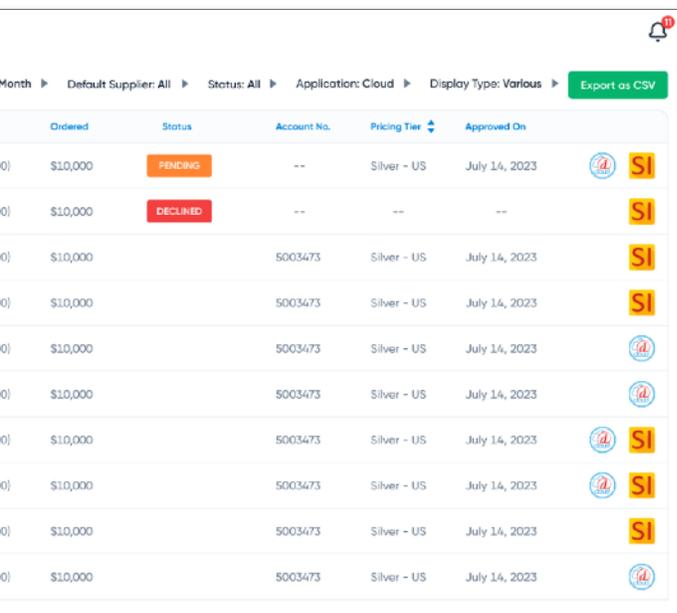## Provide D-Tools with Regular Product Data Updates

Keeping your product data current is important to integrators specifying products for their projects. If your models and pricing information are not up to date, integrators may not be able to accurately create a winning proposal for their client, or accurately gauge their anticipated profit from a project. To keep your product information current:

- We recommend updated data be sent over once a month as there is a date stamp on products and pricing showing the last time they were updated. Even if products haven't changed, a regular update will appear to be fresh content.

- Do you have an API? If you do, we can do an integration that will provide dealers with real-time pricing. You also get preferred placement in our software when we have an integration with you.

Notify D-Tools of Changes

It's not just your product data that needs to be current. Communicate key company changes with D-Tools so we can keep your information up to date, such as:

- New logos and other marketing materials

- Company acquisitions, new brands, major changes

- Personnel changes for marketing, data, dealer authorizations, or reporting

Manage Your Dealer Authorizations

There are ways to manage your dealers better by providing us authorization criteria for active dealers. We can automatically manage most of your approvals with our dealer pre-authorization document. It only requires 4 fields: dealer account number with your company, dealer zip code, dealer price tier, and additional discount (if applicable). By providing this it will automatically authorize dealers if they put in their correct account number and zip code. If not, you will still receive a manual authorization request. This dealer pre-authorization document will also remove any dealers who have churned or are no longer authorized.

Train Your Team

Knowledge is power. We are happy to do a training for your team so that they have a full understanding of who D-Tools is, what we do, why we're partners, how we work with you, and how the partnership benefits everyone involved.

Speaking of knowledge, make sure to read the quarterly i3 Partner newsletter. We don't want to clutter your In Box, so we send once every three months an in-depth newsletter that will be review any changes or updates in the i3 Partner Program. Make sure we have all the right contacts on your team to receive the newsletter.

New Enhanced i3 Partner INSIGHTS+ Dashboard Launches

The new i3 Partner INSIGHTS+ dashboard has officially launched, and with it we have created a single location for both your D-Tools Cloud and D-Tools System

Offer a FREE D-Tools Cloud Solo License

i3 Partners have the ability to gift a license of D-Tools software to any and all of their dealers/ resellers. What better way to show your dealers that you want to help them succeed than providing them with free business management software! We've even created an individual landing page for each i3 Partner to use for promoting it. (Reach out if you cannot locate that individual landing page.) Here is an example of messaging you can use to send to your dealers:

Subject: Your FREE D-Tools Cloud Account is Waiting

As a valued customer of [your company name], we have an important FREE opportunity to help you grow your business. We have partnered with D-Tools, the leading business management software provider, to offer you a FREE license of D-Tools Cloud Solo software. There is no catch... get a FREE Solo D-Tools Cloud license on us!

Don't miss out on this opportunity to be more efficient and close more deals! Sign up now and thank you for your support of [your company name].

Click Here for Your Free License [use hyperlink to landing page here]

About D-Tools Cloud [https://www.d-tools.com/cloud]
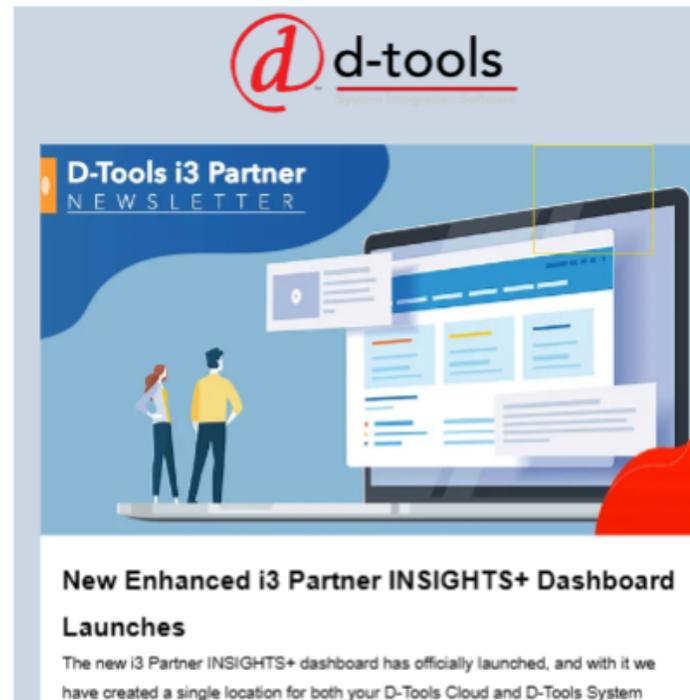
Take Advantage of D-Tools Free Co-marketing Opportunities

D-Tools has a number of ways that i3 Partners can reach our vast audience of software users, including:

- Supply content for our monthly newsletter. Our recipient list is 25,000 subscribers.

- Use the exclusive website landing page that we provide for your company in your own newsletters, emails, on your website, or on your social media feeds to promote your affiliation with D-Tools and the FREE D-Tools Cloud Solo license.

- Tag us in social media posts so that we can repost

- Cross promote our partnership at trade shows

D-Tools Monthly NEWSLETTER
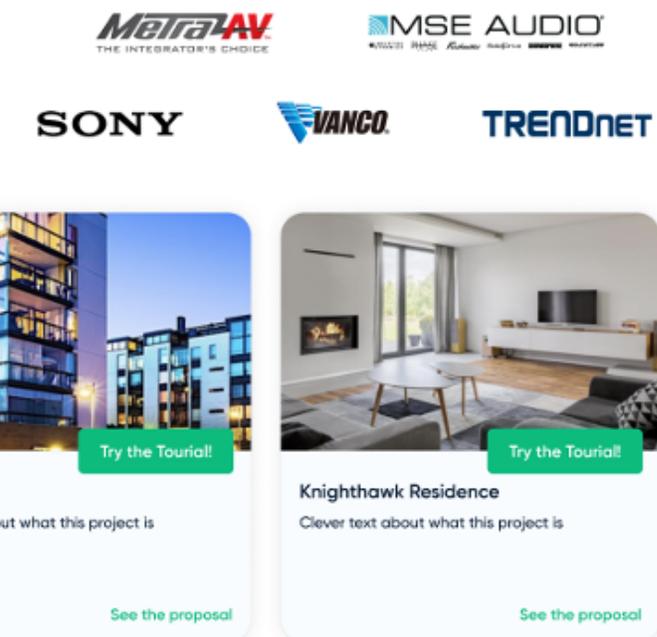
MESSAGE FROM D-TOOLS CEO

Randy Stearns

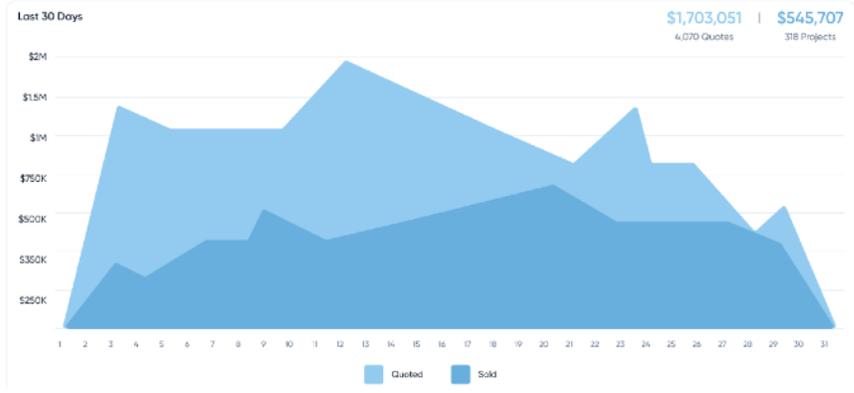One of the most insightful aspects of D-

Explore D-Tools Paid Co-marketing Opportunities

We have three paid options for marketing of which you can take advantage:

- **Sponsored Email** - You create the email, then we send it out to our 25,000 subscribers with your messaging. We only send 12 emails per year, and limit partners to no more than 1 per quarter. Cost is $2500 per instance.

- **Sponsored Webinar** - We will work with you, and invite D-Tools users to participate in a webinar that is run by you and moderated by us, to promote your brand. Cost is $5000 per instance.

- **Sponsored Categories in D-Tools Cloud Sample Projects** - Sample projects offer ample exposure to your brand while guiding new D-Tools users on how to use the software. Sponsored categories are done annually and range in cost from $1,500-$5,000 per category. You are allowed to sponsor multiple categories.

MetraAV
THE INTEGRATOR'S CHOICE

MSE AUDIO

SONY

VANCO

TRENDnet

Try the Tour!!

Knighthawk Residence
Clever text about what this project is

See the proposal

Try the Tour!!

See the proposal

Fully Utilize Your Insights Dashboard

Log in weekly to your Insights dashboard to monitor basic metrics, update approved dealers, and download dealer data. This information is also recapped for you in a monthly email.

Fully Utilize Your Insights Dashboard

This step-up level of the Insights dashboard, called Insights+, enables you to really make the most of your partnership. The reporting section of Insights+ allows you to filter by date, by location, by product category, by brand (if applicable), and by supplier (if applicable). The dashboard reports detailed sales information to you down to the individual item level. There are also comparative metrics, market share stats, category information, performance by dealer with dollar amounts, and much more. All of this information is downloadable so you can digest and disseminate as needed. Inquire to i3@d-tools.com about costs to upgrade to Insights+. **Check out our overview video** The Insights+ dashboard from D-Tools is a dynamic product that is updated monthly with additional metrics, filters, graphics and other facets. Insights+ has a product roadmap in place for the software development team that will continue to add value to the dashboard for i3 Partners.
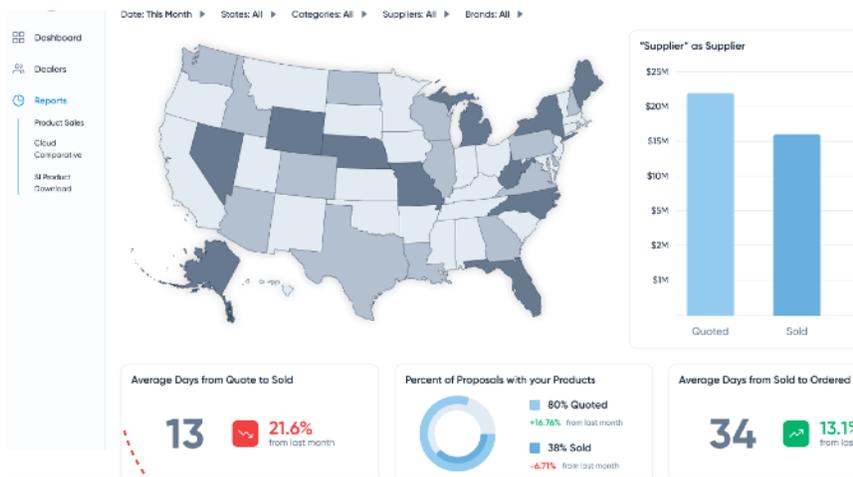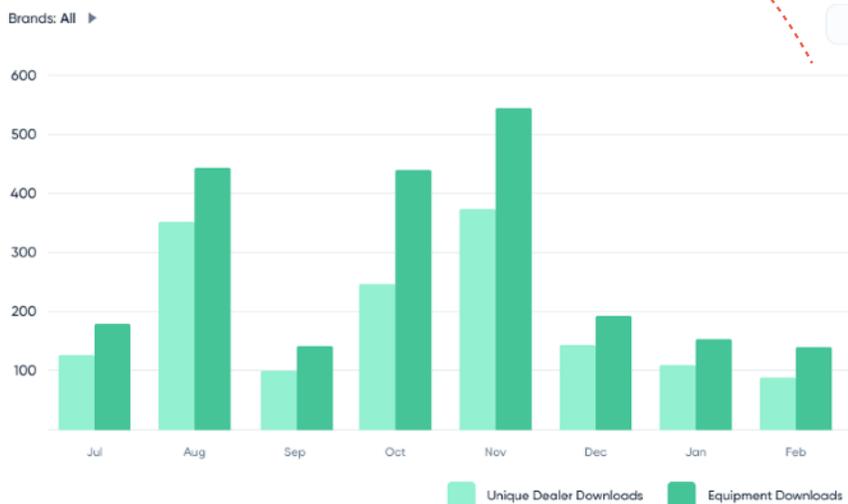
Use D-Tools Internally for Your Own Design Needs

This can be to create system designs for your dealers, for internal projects, or even for trade show booth layouts. As a partner you get 5 free seats to D-Tools Cloud and 1 free seat to System Integrator.

Ask for a Custom Report

If you are launching a new product, considering a new category of products, or even just want to get the lay of the landscape in your existing product categories, D-Tools has the ability to generate custom reports from the aggregated data. Custom reports will reveal your company's performance against your competitors (market shares shown anonymously), gauge the overall market trends for a product category, and offer estimates on the full market size in terms of dollars and units. The custom reports can be tailored to your specific needs, based on limitations. Inquire to i3@d-tools.com about costs for a custom report.

Attend Monthly i3 Partner Webinars

Every month, D-Tools will take a look at relevant data and opinions that can help guide your business. Webinars will cover key topics such as analyzing distribution versus direct sales, profit margins by project size, sales cycles, training do's and don'ts, and more. The free webinars are only 30 minutes maximum and can be pure data analysis along with Q&A interviews from top D-Tools users offering their insight for suppliers. The full slate of webinars can be found in the regular quarterly i3 Partner newsletter.

Engage in Quarterly Consultation with D-Tools' i3 Team

As mentioned, the D-Tools i3 Partner Program has the full commitment of the company with a fully developed product roadmap stretching throughout all of 2024 and beyond. But the support does not end there. The D-Tools i3 Partner team is available for regular check-ins with any INSIGHTS+ level partner during which you can conduct a joint analysis session to review your dashboard data to identify trends related to sales cycle, geographic differences, market share, top selling SKUs and more. Reach out to schedule a call with Barrie McCorkle or Jason Knott.

I3 Partner Team

Jason Knott
Data Solutions
Architect &
Evangelist
jasonk@d-tools.com
(413) 883-4910

Barrie McCorkle
Director of Business
Development
barriem@d-tools.com
(970) 379-4342