

SANDLER PARTNERS **NATIONAL SUMMIT 2021**

September 13
Hyatt Regency Resort & Spa
Huntington Beach, CA

AGENDA





EVENT SCHEDULE

SUNDAY, SEPTEMBER 12

5:00 - 6:00 pm PT	EARLY REGISTRATION/BADGE PICKUP
6:00 - 7:30 pm PT	NATIONAL SUMMIT COCKTAIL RECEPTION (Location: Lighthouse Courtyard)
8:00 - 10:30 pm PT	POKER TOURNAMENT WATCH PARTY (Location: Red Chair Lounge)



EVENT SCHEDULE

MONDAY, SEPTEMBER 13

EARLY MORNING SUMMIT EVENTS

6:30 – 7:30 am PT

BEACH YOGA (optional)

- Meet at end of bridge on sand by Huntington Beach Lighthouse

7:30 – 11:00 am PT

REGISTRATION OPEN/BADGE PICKUP

7:30 – 9:30 am PT

BREAKFAST AT SOUTH FOYER/OUTDOOR TERRACE

7:30 – 8:15 am PT

1st Window: Photographer Available for Headshots

8:00 – 9:15 am PT

NEW AGENT PARTNER 101 TRAINING & BREAKFAST (optional, early registration required) (Location: Huntington Ballroom North)

8:00 – 8:50 am PT

GETTING STARTED WITH SANDLER PARTNERS

- Hosted by Brad Driver (Director of Partner Advocacy), Cesar Navarro (Director of Partner Services), Denise Navarro (Portal Experience Manager), Drew Kenworthy (Vice President of Financial Operations), Kamran Kowsari (Sales Engineer), Michelle Labern (Regional Channel Manager), Paul Seeley (Senior Vice President), and Tina Salimi (Marketing Manager)
- Learn how to leverage the many Sandler Partner resources available to you throughout a deal lifecycle. We'll review sale scenarios and discuss the potential actionable steps you can take to contribute to your success and put more money in your pocket. With Sandler Partners' A-to-Z solutions and support, you are equipped to efficiently meet your clients' needs both big and small!

8:50 – 9:15 am PT

GETTING THE MOST FROM THE SANDLER PORTAL

- Led by Denise Navarro (Portal Experience Manager at Sandler Partners)
- Our most successful partners regularly leverage different aspects of the Sandler Portal to advance their business. We've included features that make your job easier, enhance your capabilities and enable you to tackle functions that you may not be adept at. What are you missing out on?

8:00 – 9:00 am PT

MASTERING CLIENT CONVERSATIONS SMALL GROUP WORKSHOP (optional, early registration required) (Location: Huntington Ballroom South)

- Denise Paglia-Cole, Own the Room Presentation Coach
- CIOs may speak our language, but non-techie execs often make the final decision. In this fun, activity-based training, learn to identify your audience, adjust messaging and apply techniques to make tech-heavy concepts understandable and memorable.

8:00 – 9:00 am PT

1:1 TECH PROVIDER MEETINGS



EVENT SCHEDULE

MAINSTAGE MORNING

9:30 – 10:00 am PT	OPENING REMARKS WITH ALAN SANDLER & SUMMIT HOST LINZIE JANIS (Location: Mainstage, Salon D-G)
10:00 – 10:10 am PT	TECH PROVIDER AWARDS & RAFFLE
10:10 – 10:55 am PT	<p>OPEN YOUR HORIZON TO ANY SCALE ENGAGEMENT (Location: Mainstage, Salon D-G)</p> <ul style="list-style-type: none"> • Hosted by Ryan Yakos (SVP Channel of the Mid-West Region at Sandler Partners) • Top providers AT&T, Broadvoice, Cox, Mitel, and Vonage share their tips and insights for winning business with organizations of every size and level of complexity — from simple mom-and-pop operations to large-scale, multi-location entities with elaborate demands. Understanding the requirements and motivations of decision makers is the first step to making them happy, and winning the deal. • Chris Jones - AVP Sales Channels, Alliance Channel & ACC Business at AT&T • Jim Murphy - CEO at Broadvoice • John Muscarella - Executive Director Indirect Channel Sales at Cox • John Lindsley - VP Channel Sales at Mitel • Jim Regan - Channel Chief at Vonage
10:55 – 11:00 am PT	TECH PROVIDER AWARDS & RAFFLE
11:00 – 11:35 am PT	COFFEE BREAK IN EXHIBIT HALL (Location: Exhibit Hall, Salon A-C)
11:00 – 11:35 am PT	1:1 TECH PROVIDER MEETINGS

MORNING BREAKOUT SESSIONS

11:35 am – 12:30 pm PT	<p>SALES TRACK: Success Under a Microscope: UC Top Sellers Speed Roundtable (Location: Mainstage, Salon D-G)</p> <ul style="list-style-type: none"> • Hosted by Justin Noller (Director of Channel for New England at Sandler Partners), Vinny Helfrich (Director of Channel for Metro New York at Sandler Partners) • This is your chance for a literal seat at the table, sitting down in small groups with top providers to discuss the UC business — be prepared to be engaged. But first they'll share strategies and tactics demonstrated in case studies for real examples of how to position and close deals. • LogMeIn, Nexogy, Nextiva, Mitel, Windstream
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EVENT SCHEDULE

TECH TRACK: Mastering the Managed IT Services

Conversation Panel (Location: Huntington Ballroom South)

- Hosted by Eric Beller (SVP Sales & Complex Solutions at Sandler Partners) and Kamran Kowsari (Sales Engineer at Sandler Partners)
- The way we work and the definition of the workplace has changed over the past year, as businesses embrace the necessity for Managed IT services. Four top tech providers in this area come together to discuss their views, approaches and future projections — tech insights you won't find anywhere else.
- **Call One, Cox Business/RapidScale, DYOPATH, Fusion Connect**

GROWTH TRACK: Demystify Marketing | Tools & Strategy Workshop (Location: Huntington Ballroom North)

- Hosted by Tina Salimi (Marketing Manager at Sandler Partners), Laz Gonzalez (Marketing Strategist)
- Gain key insights into the Seven Marketing Best Practices that are key to driving digital marketing success for partners. We'll take a deep dive into tactics and tools using Sandler's Partner Marketing Center and learn, step-by-step, how you can make your own digital transformation. While touring the Marketing Center, you will discover how to download and customize content for use in emails and social campaigns to build new pipeline opportunities and land additional sales.

AFTERNOON LUNCH & NETWORKING

12:30 - 1:45 pm PT

LUNCH (Location: Outdoors at Lighthouse Courtyard)

12:30 - 1:45 pm PT

1:1 TECH PROVIDER MEETINGS

1:00 - 1:45 pm PT

2nd Window: Photographer Available for Headshots



EVENT SCHEDULE

FIRST AFTERNOON BREAKOUT SESSIONS

1:45 – 2:40 pm PT

SALES TRACK: Dissecting Success: A Closer Look at SD-WAN Wins (Location: Huntington Ballroom North)

- Hosted by Andrew Paretti (Senior Vice President at Sandler Partners)
- Success can be a formula that on first inspection seems like lightning in a bottle. Five top Sandler Partner SD-WAN providers, each with unique advantages that will appeal to customers, walk you through projects and highlight pivotal moments that are instrumental to success that you can replicate and will help you land the deal.
- **BigLeaf Networks, Comcast, QOS, TPx, WiredIQ**

TECH TRACK: Identify the Threat Landscape & Sell Security with AT&T Cybersecurity Evangelist Theresa Lanowitz (Location: Mainstage, Salon D-G)

- Hosted by Eric Beller (SVP Sales & Complex Solutions at Sandler Partners)
- Theresa shares her experience as a software developer, analyst, and tech security pioneer, identifying the rapidly changing security threat landscape. You will learn to assess points of threat opportunity and the steps your clientele should be taking to reduce exposure — from VPNs and AI cybersecurity to cloud applications and upgrade regiments to current challenges and what's lurking around the corner.
- **AT&T**

GROWTH TRACK: The Power of the Opener, Interactive Workshop (Location: Huntington Ballroom South)

- Denise Paglia-Cole, Own the Room Coach
- Before you can close, you need to open the conversation — capturing attention from the very beginning to establish credibility and emotional connection. It sets the tone. It's how you'll be perceived. Learn to inspire customers to take action, and establish a lasting engagement.



EVENT SCHEDULE

SECOND AFTERNOON BREAKOUT SESSIONS

2:45 – 3:40 pm PT

SALES TRACK: Connect to the Internet Equation, From Basic to Advanced Concepts (Location: Huntington Ballroom South)

- Hosted by Michelle Labern (Regional Channel Manager at Sandler Partners)
- Internet is a huge component of what we do and our customer operations. Without bandwidth, business doesn't happen. Learn secrets for getting a foot in the door and how to sell more internet and network solutions to customers, including the secret to embracing fiber.
- **GeoLinks, Lumen, Spectrum, Viasat**

TECH TRACK: Master Class, UC Advance Sellers Tech Panel (Location: Huntington Ballroom North)

- Hosted by Alex McBratney (Senior Carrier Consultant at Sandler Partners), Dustin Riedel (Channel Manager at Sandler Partners)
- Go beyond simply combining voice, telephony, real-time messaging, video and audio conferencing. In this focused session we dive deep into the technology, present the strengths of providers and what options you can offer – plus how to incorporate this knowledge into your client conversations in a way that leads to sales..
- **Avaya, Broadvoice, Dialpad, Zoom**

GROWTH TRACK: The Power of Influence in Work and Customer Relationships (Location: Mainstage, Salon D-G)

- Led by Alan Echtenkamp, Organizational Psychologist
- Each day we navigate complex and dynamic cognitive and emotional experiences – much of which occurs below the conscious level. Controlling and directing this energy, and recognizing how it shifts in others, can have a profound impact on how you approach relationships and customer interactions.

2:45 – 3:45 pm PT

1:1 TECH PROVIDER MEETINGS

3:40 – 4:10 pm PT

COFFEE BREAK IN EXHIBIT HALL

3:40 – 4:10 pm PT

3rd Window: Photographer Available for Headshots



EVENT SCHEDULE

MAINSTAGE AFTERNOON

4:10 – 4:20 pm PT

TECH PROVIDER AWARDS & RAFFLE

4:20- 5:05 pm PT

**BE READY TO ANSWER YOUR CUSTOMER'S CALL:
THE INS, OUTS AND UPSIDE OF CCAAS**
(Location: Mainstage, Salon D-G)

- Hosted by Paul Seeley (SVP at Sandler Partners)
- Representatives from the leaders in Cloud Contact Center Solutions –8x8, Dialpad, RingCentral, and Vonage— present a high-level overview of the modern “Call Center.” From back-end to end-user experience, you’ll learn about the IT infrastructure, analytics and delivery systems that make CCaaS such a lucrative offering.
- **Tony Poer - Channel Solutions Consulting Lead at 8x8**
- **Mike Kane - SVP, Channel Sales at Dialpad**
- **Holly Zinn - Director of Partner Product Programs - CX at RingCentral**
- **Aqeel Shahid - VP - National Strategic Partners at Vonage**

5:05 – 5:15 pm PT

TECH PROVIDER AWARDS & RAFFLE

5:15 – 5:30 pm PT

CLOSING REMARKS WITH ALAN SANDLER
(Location: Mainstage, Salon D-G)

EVENING RECEPTION & DINNERS

5:30 – 6:45pm PT

**NETWORKING RECEPTION OUTDOORS AT
LIGHTHOUSE COURTYARD**

7:30 – 9:30pm PT

TECHNOLOGY PROVIDER DINNERS



EVENT SCHEDULE

TUESDAY, SEPTEMBER 14

8:00 - 9:00 am PT

4th Window: Photographer Available for Headshots

10:00 am -
3:00 pm PT

Sandler Partners Hosted Golf Event (*optional, early registration required*) (Location: San Juan Hills Golf Club)

- Join top Sandler Partners and Technology Provider Channel Managers in an 18-hole round of golf at San Juan Hills Golf club. Transportation is provided from hotel to the golf course, departs the Hyatt Recency Summit Hotel at 8:15 am and 8:30 am. Shot Gun start time is at 10:00 am. Drinks and food included. Please pack shoes and gloves. We will provide balls.



EVENT HOST BIOS



Alan Sandler Managing Partner

Alan is Managing Partner for the Master Agent Sandler Partners, America's fastest-growing distributor of connectivity and cloud services. Under his leadership, the company has grown to more than \$100 million in annual revenue, landing on the Inc. List of America's Fastest-Growing Private Companies for twelve straight years (2010-2021). Sandler, a serial entrepreneur, also was a co-founder of Justice Telecom and a co-founding shareholder of TelePacific.



Linzie Janis Emmy Winning Journalist and Communications Consultant

Linzie is our master of ceremonies for the Sandler Partners Summit 2021. She is an Emmy-winning journalist who has worked as a correspondent and anchor for ABC News, Bloomberg TV, and CNN reporting on a wide range of news stories from terror attacks to the global economy. Janis currently works as a communications consultant helping business leaders build trust and connection with audiences.



SESSION HOST BIOS

Eric Beller **SVP of Sales & Complex Solutions**

Eric is in his eighth year with Sandler Partners and helps identify solutions and providers while aligning to the needs of Sandler Partner agents. He manages the technical sales engineering team and is a customer-facing technical resource for our Partners. Eric has 25 years of industry experience and earned his telecom degree from Michigan State. He's held various technical, sales, and marketing roles, including Channel Chief for then MegaPath and Speakeasy.

Alan Echtenkamp **Founder and Organizational Psychologist** **at Slingshot Leadership**

Alan is an organizational psychologist and founder of Slingshot Leadership. He has 25 years of experience helping leaders create high-performing teams that drive growth and profitability. He has worked with senior executives across multiple industries in the U.S., Europe, Asia, and Latin America. Prior to launching Slingshot Leadership, Alan was the head of global talent management for Time Warner Inc. for 10 years. In this role, he was responsible for leading succession and development strategies for senior business and creative executives across all Time Warner businesses.

Laz Gonzalez **Marketing Strategist**

Laz is a prominent industry analyst and digital marketing thought leader. Laz has served as strategic advisor to leading B2B channel programs worldwide and helps educate Sandler Partner agents on digital and social selling strategies. Laz is joining us to discuss how digital marketing can become a force multiplier to a partner's business.

Vincent Helfrich **Metro NY Channel Director at Sandler Partners**

Vincent is the Channel Director of the New York Metro region and joined Sandler Partners in 2020 to manage Partner relationships in New York and New Jersey. He has 20 years of experience working with Partners to drive revenue and help grow their business. His focus areas include understanding Partner goals, creating strategies to achieve them, and providing great Partner experiences. His expertise is in UCaaS, CCaaS, managed services, cloud, and connectivity.



SESSION HOST BIOS

Kamran Kowsari

Sales Engineer at Sandler Partners

Kamran is a Sales Engineer with Sandler Partners. He provides pre-sales support to our partners and sales team on complex opportunities by assisting in technical discovery, scoping, sourcing the technology, and finding the right provider. His focus areas include network (LAN/WAN), security, backup and disaster recovery, UCaaS, CCaaS, endpoints, virtualization, and cloud solutions. He has over 15 years of experience in the design and implementation of systems and cloud technologies, project management, consulting, and pre-sales skills to drive and improve business performance.

Michelle Labern

Regional Channel Manager at Sandler Partners

Michelle is a Regional Channel Manager at Sandler Partners. She focuses on recruiting new agents and training them on the Sandler processes and solutions that they can offer. Michelle has seven years of experience in the IT world working for ISPs, managed service providers, and hosted phone providers. She is well-rounded in a wide variety of IT solutions. She also has experience building a direct channel.

Alex McBratney

Senior Carrier Consultant at Sandler Partners

Alex began his career in telecommunications as a Time Warner Cable sales consultant for Sandler Partners. After only 18 months, Alex had acquired 395 clients and sold just over \$2M in contracted revenue. He quickly acquired the skills, adaptability, and know-how required to succeed as a leader in IT consulting. In 2016, his focus shifted to developing full-service consultancy for his mid-market clientele as he recognized a need for simple yet reliable processes throughout the sales cycle. Four years later, he and his team have over 100 mid-market clients with more than \$19M in contracted revenue.

Denise Navarro

Portal Experience Manager at Sandler Partners

Denise serves as Portal Experience Manager for Sandler Partners. She manages the Sandler Portal which 10,000+ Partners use 24/7/365 to access commission statements, sales tools, and info on 200+ providers. She must regularly assess the portal user experience and understand Partners' needs in order to develop and improve portal functionality and information. For six years, Denise has gained extensive knowledge of Sandler's providers and processes, with diverse past roles that include advising partners with quotes, managing new provider onboarding, demoing the portal live at summits, and bringing partner marketing communications in-house.



SESSION HOST BIOS

Justin Noller

New England Channel Director at Sandler Partners

Justin is Director of Channel for the New England and Eastern Canada regions. He prides himself on knowing just enough to be dangerous and being able to help guide his Partners down the right path within communications aaS, security aaS, networking, and more. Justin has spent his entire career in technology within the channel. Prior to joining Sandler Partners, he ran Verizon Enterprise Sales with a Verizon Platinum Partner, managed the channel in the Northeast at inContact, and managed the channel in the greater New York City area at Intelisys.

Denise Paglia-Cole

Senior Instructional Coach at Own The Room

Denise is a Senior Instructional Coach who focuses on assisting people to improve their speaking skills and get out of their comfort zones. She started her career as a fitness competitor and eventually became a speaker and spokesperson. Denise then became a host and writer for ESPN's Fitness Beach and has worked with many celebrities, actors, and athletes.

Andrew Paretto

Senior Vice President at Sandler Partners

Andrew is a Vice President and Technology Advisor and has been with Sandler Partners since March 2020. He spent 17 years at TPX Communications where he served as President of Sales for the last three years, covering the western and central regions. Prior to that, he was Regional Vice President in northern CA for TelePacific. He spent five years at Brooks Fiber Communications and 10 years at AT&T. He focuses on solving his clients' critical business problems and leveraging cyber security, UcaaS, and SaaS applications.

Dustin Riedel

Senior Carrier Consultant at Sandler Partners

Dustin is the "light beer" of Sandler Partners; he likes to work hard but play even harder! Alan once printed 500 business cards with his title as "Company Clown." Dustin's time is mainly spent being a Sales Genius/Rainmaker. When he's not closing some huge deal, he's leading his back-office team of ten full-time telecom experts. Dustin's back office handles sales, quotes, project management, and account management. Previously he was a Ping-Pong Champion, and he clearly tries to make up for his lack of intelligence and crippling insecurity with humor and charm. He's been with Sandler since his first deal in 2006, leveraging his technical background and understanding of business processes to help sell solutions that improve his customers' businesses.



SESSION HOST BIOS

Tina Salimi

Marketing Manager at Sandler Partners

Tina is a Master of Communications Management, true in real life and what it says on her degree. She is equally comfortable digging into the approaches for strategically focused creative and working with the many marketing delivery mechanisms that exist today — including the Sandler Marketing Center which she helped develop. Analytics, media buys, press cycles, content calendars, audience abstracts, we have yet to find a place outside of her comfort zone, including the very technical aspects required of a member of the Sandler Partners Team!

Paul Seeley

Senior Vice President at Sandler Partners

Paul joined Sandler Partners as Regional Vice President in 2009 to build out the Texas channel. He is excited by the huge growth in the Texas market and passionate about helping agents build their residual revenue. Previously, he held sales and channel management roles at CLECs and ILECs, where he was consistently a president's club winner. He's also founded and sold small health and wellness companies.

Ryan Yakos

Senior Vice President, Channel Midwest Region at Sandler Partners

Ryan is SVP of Channel Midwest Region, and he joined Sandler Partners in 2017. He focuses on driving revenue and enabling Partner growth and wins. He has nearly 20 years of industry experience in sales management and a proven track record of driving revenues through leadership, training, and development of top sales, engineering, operational, and support staff. Previously, Ryan was Vice President of sales and marketing for Access One. He also held management positions at First Communications and Davnet USA.

