

Modes Theory™

Assessment

Understand your most
ambitious vision of success.



CONNECTWISE®

Assessment Overview

Your Results

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Note: By taking the Modes Theory® Assessment, ConnectWise will record your completion date, Modes Mindset, OML score, and Open responses, but not the full Modes Assessment Report. If you agree to share your Assessment Report, ConnectWise may share your Assessment results with key colleagues in the systems described above and below.

Scott George, Acme IT, LLC (Test company)

July 19, 2022 at 9:04:22 PM

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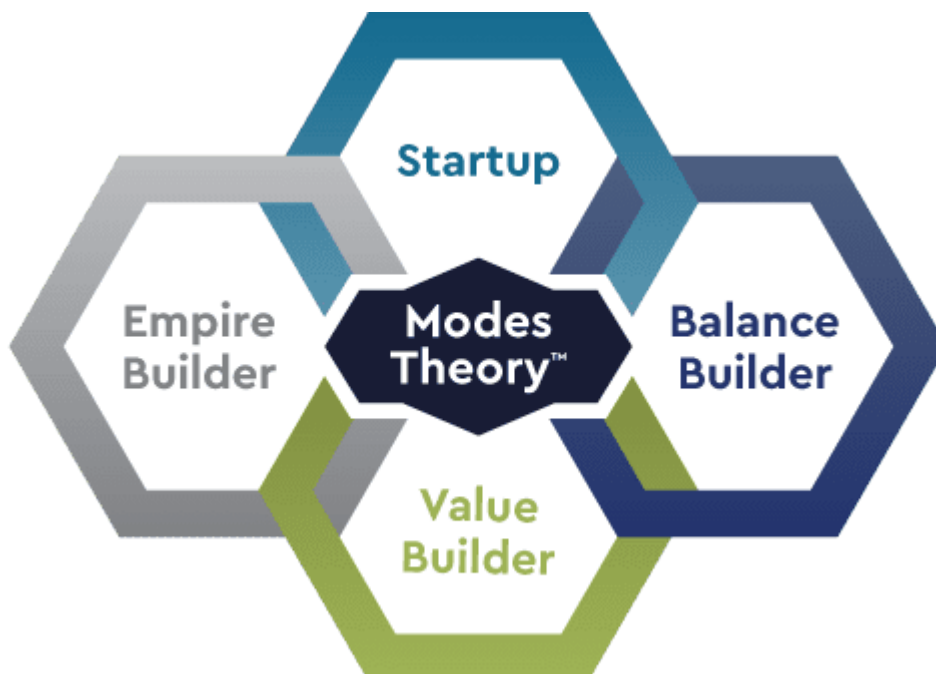
Assessment Overview

"If partners know where they want to go, and they have a plan and will execute it, the odds of getting there are high."

- Arlin Sorensen, VP, Ecosystem Evangelism, ConnectWise

Congratulations on completing the ConnectWise Modes Theory Assessment, your first step in a new discovery process. Modes Theory™ (aka Modes) begins by helping partners cultivate and develop a growth mindset. Then through interrelated concepts, tools, and benchmarks, business owners and their teams engineer a resilient and profitable business while still navigating uncertainty and continuous change. At ConnectWise, we believe in a partnership that seeks to understand your most ambitious vision of success and enable sound decision-making along the journey. Modes helps you clarify that vision, align your team, and chart your course to get there.

Developing a deeper understanding of your current and future "mode" helps you take advantage of purpose-built training, peer groups, solutions, and ecosystem resources. As your business model, culture, strategy, and leadership approach come into alignment with behaviors and actions that are best practices for your Mode, you'll see exciting results. You may use the assessment as a self-guided tool or with other resources to help guide your path.



YOUR RESULTS

Modes Mindset™ and Journey Responses

Your identified Modes Mindset and partner journey responses are shown below and discussed in the following sections.

The OML scale looks at the operational characteristics of TOPs and rates them on a scale of 1-5 on their ability to operate their businesses in an optimal way, ultimately reflected by their profitability. The OML scale is detailed in the Appendix.



Definition of Value Builder: The value builder is focused on creating consistent increases in value over time. It is growth based but is not with profitability in mind. A focused commitment to emotionally about creating that consistent upward to the right value proposition.

Modes Characteristics: In addition to your identified Modes Mindset, here is a breakdown of your assessment responses, which predict each of the four Modes. You may see responses indicating Modes other than those you selected. If so, consider reevaluating your Mode against the Modes Proficiency below. Also, consider including input from people you trust. Modes are not determined by maturity or size. Instead, different Modes exhibit different Operational Maturity Levels™ (OMLs) across the range of business performance. Modes Characteristics are qualitative and quantitative, and your Mode can change over time as your business needs change.

Mode	Your Response Count
Start-Up	0
Science Builder	1
Value Builder	0
On-pre Builder	1

- Educate yourself about exiting the business when the time is right. (Excellence in operations, due diligence, tax planning, and proactive deal conversations)

Commonly Heard Things You May Regret Later

- "The working long and hard hours for nothing! Oh, at some point, we'll be rewarded by selling for the valuation we've been building today!"
- "As the principal, I led our company and our culture. We've struggled to make our legacy system and relationships more growth has become steady, but I don't see a reason to change when I'm involved!"
- "I hear about companies adopting SaaS and changing plans. We don't need those things at what we are, so just focus on our products."
- "Best business metrics and practices are for larger companies to figure them out and don't apply to me. We don't need to keep concern levels of our performance!"

Your OML Score	3.33
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The OML scale looks at the operational characteristics of TSPs and rates them on a scale of 1-5 on their ability to operate their businesses in an optimal way, ultimately reflected by their profitability. The OML scale is detailed in the Appendix.

Assessment Answers

PROFILE

Name Scott Sings
 Company Acorn7, LLC (Not company)
 Email scott@acorn7.com
 Role Generalist/owner
 Number of owners 1

PHASE 1: PERSONAL JOURNEY

1. What's your destination?

Answer Destination not easy Destination not easy Destination not easy Destination not easy
 Destination not easy Destination not easy Destination not easy Destination not easy

2. What's your journey?

Answer Journey not easy Journey not easy Journey not easy Journey not easy Journey not easy
 Journey not easy Journey not easy Journey not easy Journey not easy

4. What's your time horizon?

Answer Long term (5-10 years)

PHASE 2: MODES THEORY CHARACTERISTICS

6. Which mode below best describes your current mindset about your business?

Answer Value/Value

7. Which option below best describes your focus on work and life?

Answer C. Constant growth

8. Which option below best describes the purpose of your business?

Answer C. Work to build value (and increase income year over year)

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9. What option below best describes your primary reason for worry and risk in your business?
Answer B. Interruption in spending of cash.

10. What option below best describes your source of financing?
Answer C. Company cash

11. What option below best describes your status of profitability?
Answer C. Slow improvement toward Break Even

12. What option below best describes accountability in your culture?
Answer D. Required and enforced

13. What option below best describes your sales approach?
Answer C. Trying to implement

14. What option below best describes your prospects and growth?
Answer C. Flat

15. What title best describes your most likely future title?
Answer: The company's future Mission/Strategy or change in value/budget

PART 3: OPERATIONAL MATURITY LEVEL TRAITS

17. What best describes the structure of your Chart of Accounts for Services Revenue and COGS?
Answer:

18. What is your method for managing cross-selling to existing accounts?
Answer C. Services are cross captured by each offering, services later payed for billed hours in COGS, outlined in S&A.

19. How would you describe your project delivery methodology?
Answer D. Cross-selling goals are set for most significant accounts and attainment persistently managed.

20. To what extent do you require your clients comply with your technology standards?
Answer C. Mostly complete, used on over 70% of projects, key metrics reported by project.

21. How do you assess risk to deal with the client over IT operational maturity level?
Answer D. Standards defined, higher fees for non-compliance

22. What is your sales management methodology?
Answer C. Semi-formal process performed frequently but not offered as a consulting engagement.

22. What is your top selection for sharing data from the assessment?

Answer: C. Most interconnected in a system, probability of close steps defined but compliance is not uniform, sales team is managed primarily by production level.

Next Steps: Where to Go from Here

There are two main options for moving forward:

1. **Self-guided journey:** Use the resources in this report and on the [Modes Theory webpage](#) in a self-service approach to your journey as a business and within the ConnectWise ecosystem.
2. **Guided journey:** Let us share and teach what we've learned working with other partners. We'll match you with the right colleagues, share our tools and frameworks, and provide decision support.

In either case, you must decide to start. Here are key activities to help you take the next step and maximize your value:

1. Understand your Modes Theory Assessment.
2. Discuss the results with your partners, teams, and peers.
3. Plan IT Nation activities for you and your team through 2022-2023.
 1. Conferences (IT Nation Connect, IT Nation Secure)
 2. Community Groups (IT Nation Share)
 3. IT Nation Evolve Peer Groups (Owners, Service Executives, M&A, CFO, other)
 4. Leadership Development (University, additional resources)
4. Investigate opportunities with Service Leadership Inc.'s SLIQ and Report Bundles.
5. Consider sharing parts of your Modes Assessment with ConnectWise colleagues to improve understanding and guidance related to your Mode.

We know you have many reasons to be proud of your accomplishments. Ultimately, the Modes Theory Assessment may expand your awareness of the uniqueness, health, and future of your mindset and your business. The goal is to help you understand yourself better through your eyes and through the eyes of your partners, team, and peers.

We also know the world has changed and continues to change rapidly. The agility of TSPs is being tested. In the past, you moved a few key levers to run your business. Today you're more like a sound engineer adjusting the many channels on the equalizer to produce the quality experience people expect.

You know business models change, and superior business models win. You, your team, your peers, and ConnectWise can help you determine what success looks like and plan a path to get there. We encourage you to choose the best journey to your destination.

"Dream big, start small, but most of all, start."

– Simon Sinek

Appendix

Modes Assessment Overview

What is a Mode?

A Mode is the culture or mindset you are looking for. The Mode sometimes how you define success, manage your service delivery offerings, lead your teams, build systems, and develop partnerships.

A Mode reflects a way of thinking, operating, and acting. The collection of your attitudes and its set an underlying belief. Company success change Modes over time and experience different results. Modes are established by history or one. Modes that are influenced of others like thought processes, vision setting, behaviors, and outcomes of teams, leaders, and teams.

Why are Modes Important?

Clearly understanding your Mode helps you understand where you and your business are today. This understanding clarifies where you want to go and how best to get there. Additionally, the Mode conversation may challenge or challenge mindsets, behaviors, and plans with your team, peers, customers, and ConnectWise colleagues. Something as simple as aligning your destination and your time horizon may significantly impact how you feel in future years.

What are the Modes?

Today we categorize TDPs into four Modes: **Startup, Business Building, Value Building, and Single Building**. Each Mode exhibits a unique purpose, strategy, and vision of success, as well as a commitment to how to employ people productively and profitably.

Review the **Mode Profile** table below for a description of **Value Building** the Mode you selected, Ask yourself and your team questions such as:

1. Does the Mode fit to reflect the mindset I have today? If not, what needs to adjust or change?
2. Will the Mode fit to allow me to achieve my destination within my agreed time horizon? If not, what needs to adjust or change?
3. What one or two decisions will I need to make to increase my chances of reaching my desired destination?

Partner Mode Interview Videos (See [Modes Resources website](#) for full list.)

Startup: [Build the right foundation](#)(3:29); [Full interview with Partner](#) (42:08)

Balance Builder: [Is there another path?](#) (1:05); [What's most important?](#)(1:49); [Full interview with Partners](#) (47:36)

Value Builder: [Building value in the company](#) (3:46); [Journey: Start Up, Value Builder, Empire Builder](#) (3:40); [Full interview with Partners](#) (59:55)

Empire Builder: [Importance of velocity](#) (1:14); [Innovating for faster acquisition](#) (1:01); [Full interview with Partner](#) (38:34)

View a higher resolution version of the [Modes Mindset Profile here](#).

CHARACTERISTIC	STARTUP	LIFESTYLER	LEGACYER	EMPIRE BUILDER
High Level				
Purpose	Start something	Support their lifestyle	Consistent growth	Exponential growth
Life focus	Live to work	Work to live	Work to grow	Work to make money
Time	Consumed	Freedom	Bury	Focused
Business Atmosphere	Chaos	Status quo	Structured improvement	Rapid change
Worry / Risk	Something happens to owner	Interruption in spinning off cash	Missing revenue targets	H&A or stretch targets aren't hit
Money				
Size	1	1	111	11111111
Money	Tight	Consistent	Growing	Variable
Finance	Personal	Personal debt	Company debt	Investors
Budget	None	Personal only	Basic one year	Detailed and multi year
Profitability	Minimal	Lifestyle driven	Slow growth	Driving to High profit
Valuation	Low	Low	Medium	High
People				
Family	Ignored	Priority	Paused	Shelved
Operator	Founder	Founder(s)	Team	External team (investors)
Customer Relationships	Strained	Deep	Long term	Evolving
Culture	Undefined	Lifestyle	Developing	Structured
Accountability	Inconsistent	Loose	Expected	Enforced
Sales/Marketing				
Sales Approach	Technically led	Principal led	Understand need to transition	Sales led
Business Model	Sell anything people will pay for	Sell high margin opportunities	Standards and process	Repeatable and scalable
Source of New Business	friends and neighbors	Referrals	Referrals and marketing	Disciplined marketing and vendors
Marketing Investment	Sporadic	Minimal	Growing	Significant
Future				
Growth	Elusive	Controlled	Opportunistic	Strategic and focused
Timeline until transition	Long	Long	Medium	Short
H&A	Wishful thinking	Little interest	Some interest	Strategic plan
Change	Resist	Status quo	Want to improve	Drive rapid and radical change
Scalability	None	Not interested	Beginning to focus	Focal point
Planning	Limited	Tied to lifestyle	Inconsistent	Disciplined

Job Roles and Modes

A fundamental concept of Modes Theory is that people have unique mindsets; therefore, people have unique Modes. Only you can define your destination for your business and life, how you plan to reach that destination, and your timeline. In the meantime, the Modes Mindsets of those around you influence your alignment, decision-making, planning, and ability to reach your destination. Here are examples of various roles and Modes.

- **Individual owners** Individual business owners have a high degree of control over how their Mode aligns with the direction and plans for their business, teams, customer parties, and lives. This control can be healthy when what you think aligns with your behaviors. Lacking another set of eyes and ears who know you well can create misalignment without your knowledge.
- **Multiple owners** Businesses with multiple owners may have a distributed degree of control over how their Modes align with the direction and plans for their business, teams, customer parties, and lives. Autonomy and control may be needed for less risk and expanded returns.

One finding of Modes Theory is that 10-20% of companies with multiple owners have owners with different Modes Mindsets. This situation is not good or bad, but not acknowledging that different Modes exist for different owners can create friction over time. Business owners – especially spouses – with different Modes should identify and communicate where those differences occur (shared destination, how to achieve objectives, time horizon, etc.) and regularly review gaps.

- **Leadership teams** Leadership teams commonly consist of multiple Modes Mindsets. As with multiple owners, this is not good or bad. However, the Modes must be identified and aligned with the owner's plans and the business's destination. Many times, members contribute to alignment.

One finding of Modes Theory reinforces the saying, "What get you here won't get you there." Multiple partners give examples where actively pursuing their current Mode or moving to a new Mode mean that current leadership team needed to change. That said, the Modes shared within a leadership team member is asked to align with or work may be different than how the employee behaves outside of work.

For example, the company's Mode may include borrowing, investing, and spending to drive growth with increased risk, while the leadership team member may be a saver with low risk tolerance. The gap may or may not be a fit depending on the leadership team member's role (sales, service, admin) – but identifying and acknowledging the gap is useful.

- **Business organizations** The Modes Mindset of a company is the responsibility of and primarily determined by the owner(s). The Modes Mindset of a company and the ability of the owner(s) to reach the desired destination can be influenced by other sources and factors.

As a general example, owners who attribute 11 may believe as if they are Mode 1, as other partners and team members witness the Mode 1 behavior and follow the example. What an owner thinks and wants is

shaped by how a second owner and others behave daily. Usually, the Mode Mindset of the owner(s) intentionally aligns with the leadership team to reach the destination explained.

- **Balance partners and vendors:** Mode plays a role for balance partners and vendors in their own companies and target markets. Balance partners can improve communications and strengthen relationships by understanding and aligning with the Mode of their customers.
- **Customers:** Customers (or clients) are the main target of a TIF's individual or multiple owner Mode owners (executives). Businesses and organizations have destinations, paths, and timelines, but those rates may not be self-evident and can often extend beyond the core horizon of the TIF serving them. TIFs may select customers with whom they have an open dialog and then build Mode conversations into one-to-one or 1:100-type meetings. Reaching these conversations periodically offers the TIF a competitive advantage because it helps them better understand the customer's mindset.

Variations of Modes

Typically, an individual or business does not exhibit all the traits of a single Mode/Mindset profile. Instead, the Mode will be a combination of characteristics across two or more Modes. Here are examples:

- **Hybrid Modes:** A Hybrid Mode describes an individual or business that exhibits a consistent combination of multiple Modes/rates, e.g., a Balance/Builder/Value/Builder Hybrid. When working in a Hybrid Mode, it's essential to recognize behaviors associated with each Mode, how others see them, and how they contribute to growth.

For example, Hybrid Mode pulls from the eight Modes Theory Assessment questions a Balance/Builder + 2, Value/Builder + 4, and Engine/Builder + 1. There are no set rules, but typically a TIF in a Hybrid Mode would score at least two and probably three points in multiple Mode Mindsets (e.g., 0/2/4/1 vs. 0/1/5/1). Rather than apply the Value/Builder Mode exclusively, a review of the Mindset profile would likely produce a Balance/Builder/Value/Builder Hybrid.

- **Transitional Modes:** A Transitional Mode describes what a TIF intentionally moves from one Mindset to another. Unlike a Hybrid Mode, where a partner is relatively static exhibiting various rates of multiple Modes, a Transitional Mode such as a partner who knowingly follows a plan to change proactively.

For example, a Value/Builder may choose to transition to Engine/Builder after success with a merger and a defined desire to grow rapidly. Or a Balance/Builder may transition to a Value/Builder after their children have left the house and they find themselves to focus on steady growth leading to an eventual exit. Similarly, a Value/Builder may choose to transition to a Balance/Builder line in their entrepreneurial career to pursue a more stable schedule business.

- **Mode Change:** Mode changes refer to historical or future changes in Modes, whether planned or unplanned. Mode changes result from business situations (partnership changes, industry trends, team efficiency, etc.) and life situations (e.g., family events, educational milestones, health changes, etc.). You can work on issues with partners who changed Modes [here](#), [here](#), and [here](#), along with other partner roles [here](#).

Aligning Modes for Success

This section is designed to be used in alignment conversations with various teams on multiple topics. This section provides an introduction to the **Modes Alignment Workshop** evaluation partners.

Aligning Modes with behaviors and resources improves the potential for reaching your destination according to your timeline. As described above, there are multiple scenarios for Mode alignment and misalignment.

After reviewing your Modes Theory Assessment Report, the goals of Mode alignment discussions are to:

1. Establish and practice what reasonable alignment looks like, given each unique situation.
2. Identify conditions and situations where alignment does not exist and the steps to improve alignment. Also, identify areas of strong alignment to build further success.
3. Strengthen relationships among parties involved in Mode alignment.
4. Increase the likelihood of reaching your destination according to your timeline.

Example Alignment Scenarios and Discussion

Partner and Self Assessment

- What do other people you trust say is your predominant Mode (Mindset and behavior)?
- How does the feedback compare with your self-assessment of your Mode?

Partner and Partner(s)

- How do your individual Modes Profiles compare? What differences created questions, friction, and opportunities towards your shared destination, path, and timeline?
- Complete the Modes Theory Assessment together. What combined Mode and Modes Profile result? What differences created questions, friction, and opportunities towards your shared destination, path, and timeline?

Partner(s) and Industry Team

- In a 1:1 setting, leadership team meeting, or workshop, review the Modes Theory Assessment Report question by question. What behaviors in the business are most and least aligned with the Mode of the business?

- What differences created questions, friction, and opportunities towards your shared destinations, paths, and timelines?
- How did your responses to the DM questions compare? Why did your DM scores differ?
- What is the profile of the leadership team in terms of mix of Modes? Do members of the leadership team align with the Modes profile of other members? If not, how does not aligning impact the business in meeting its destinations and timelines?

Keyed Modes

- Are we as owners and leadership team members aware of the key traits where we span multiple Modes? Do these key traits add value to our business or create complexity?
- Are we as owners and leadership team members clear about behaviors which impact our performance and relationships between Modes? Where are opportunities for improvement?

Transition Modes

- Are we as owners and leadership team members aware of the transition we are making between Modes? Do we have a plan for an intentional transition that includes our team?
- Do we agree on our timelines and the changes needed in our business and individual roles?

Mode Change

- How can we use our lessons learned and perspectives on past or current Modes shape and impact our future?

"Regardless of what Mode you are in, knowing your Operational Maturity Level and increasing your Operational Maturity Level will help you get to the destination for that Mode. And it will even help you more easily move from Mode to Mode as your goals change over time."

- Paul Dippell, VP, Ecosystem Evangelism, ConnectWise

Since 2005, Service Leadership, using the Service Leadership Index®, has benchmarked the IT industry worldwide every quarter and it is the largest, most detailed, and most accurate benchmark database in the industry. Service Leadership developed the Operational Maturity Level (OML) rating scale based on:

- Benchmarking thousands of IT solution providers (TSPs).
- Years of experience building and running multiple best-in-class TSPs.
- Consulting with thousands of TSPs to improve their businesses.
- Analyzing which business practices are used by the high performers in the Service Leadership Index and which are used by the low performers.

The OML scale looks at the operational characteristics of TSPs and rates them on a scale of 1-5 on their ability to operate their businesses in an optimal way, ultimately reflected by their profitability, as shown in Figure 1 below.

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Operational Maturity Levels™



Higher Operational Maturity Level (OML)™ means increased ability to:
 - Increase revenue per employee & the number of employees
 - Offer superior customer experiences
 - High retention & low attrition

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Service Leadership

TIPs who are at OML 1 or 2 most often deliver bottom-quartile profitability and inconsistent growth. They also struggle to grow and scale, provide a poor customer experience and differentiate themselves positively in the marketplace.

Those at OML 3 most often are delivering median profit and moderate growth, and are starting to be recognizable, and deliver a higher quality, better-differentiated customer experience.

Those who are OML 4 or 5 most often deliver top-quartile profitability and strong growth, have a scalable business model, deliver a great customer experience and are positively differentiated in the marketplace.

Why is OML important?

The Service Leadership Index shows that top and bottom-quartile performing TIPs exist in every market worldwide, regardless of whether market is, or how large or small it is. It also shows there are top and bottom-quartile performers of all company sizes and ages, pursuing every target customer segment, using various tool vendors and representing various product vendors.

In other words, while these factors have some effect on financial and operational performance, even combined they have little effect in comparison to the degree to which an TIP manager identifies the best practices for their business and puts them to work.

This is good news, because it means that – to reach top-quartile profitability and strong growth – an TIP doesn't need to move, say, from a big city to a small town, or vice versa. They do not need to drop

one vendor's products and choose another's.

What they do need are clarity on the best practices which apply to their specific TSP business model and put them into action. We call these best practices, "DMA, Tallys"

To drive up your financial performance, scalability and customer experience

- The first step is to identify the specific TSP business model you own, that is, your "Performance Business Model" (PBM), so that you will know the specific economic drivers you must optimize
- Knowing your PBM will then allow you to correctly pick from the array of TSP best practices, those which apply to your economic drivers

General, existing categorize the TSP community into 10 PBMs. Each PBM – such as managed service provider (MSP), value added reseller (VAR), Project-Centric, etc. – has a naturally different economic model and, while some best practices are shared by all, each also has other best practices specific to it. (Determining your PBM and learn more about DMA,.)

Here are some examples of the differences in economic drivers between TSPs in different business models:

Best Practice Focus	One PBM Focus	A Different PBM
Focus on Operating in the Customer Environment	Utility and Project-Centric TSPs: Operate as often as possible. "I make more money when the customer buys and my term ends with billing over"	MSPs: Operate as often as possible, but only as often as necessary. "I make more money when there is the least change into the service contract for managing"
Focus on Providing Sales and Service Support	Utility Support TSPs: Minimize billing per customer supports more profit. When they come a client, get to do work and bill for it"	MSPs: Can work without per customer support more profit. "I generally prefer to reduce the amount total volume so I have the best cost against my fixed resource"

Obviously, the best practices achieve these different outcomes are different. Thus, knowing your PBM is a prerequisite to knowing which best practices to adopt and what is needed to implement these best practices.

What are Some Examples of DMA, Tallys, and How is a TSP Based on Them?

There are 20 DMA, Tallys that MSPs who deliver top quartile financial performance have largely mastered and enable them to perform the way they do. In DMA, Tallys are used in the Market Assessment. MSPs

in the bottom quartile have largely not mastered and may not even be aware of. Likewise, for VARs, there are 32 OML Traits, some shared with MSPs, and some unique to that PBM.

Here are some examples of OML Traits shared across all PBMs, and their low and high OML characteristics. Please note these are simplified versions. Full versions that provide a more thorough assessment of the TSP, as well as customized guidance on how to improve, is available in Service Leadership’s OML coaching tool, SLIQ™. In an actual OML assessment, materially more detail and precision are involved, such that one of five levels of maturity, and guidance on improvement, can be assigned.

Functional Area	OML Trait	Low OML Behavior	High OML Behavior	Why
Finance	Budgeting & Managing the Company	Acting as an expense account, spending money to grow the business, but not spending to generate profit. Spending money to grow the business, but not spending to generate profit. Spending money to grow the business, but not spending to generate profit.	Each person sets a budget for their business and sticks to it. The company is able to generate profit and grow. Each person sets a budget for their business and sticks to it. The company is able to generate profit and grow.	Planning your business and costs is critical to your success. A tight budget is a critical strategy. It forces you to make decisions and track your costs to mitigate risk, and to measure individual and team performance. Paying attention to budget goal attainment and aligning resources through and across all business and performance to the budget goal.
Sales	Cross Selling Services	We sell all other services of our company to all our clients.	100% of clients buy 100% of our offerings.	Our goals are to sell all our high quality and low cost services. Our goal is to maximize revenue and customer loyalty. Our goal is to sell all our services by getting every customer to buy the service and to get the most of it by selling to every 100% of them, every 100% of what they offer.

<p>Table</p>	<p>Marketing Strategy and Execution</p>	<p>We target a multiple marketing activities and we focus the marketing efforts by year and</p>	<p>We set goals for the number of leads generated and specific to address our growth goals. We use marketing spend accordingly and adjust accordingly</p>	<p>Investments must offer positive a proliferation when the demand returns and the volume of activities needed to produce it, are determined in advance. The growing from a budget no falling spending and the volume of leads to be produced, just as they budget. Service delivery and cost, and sales and cost production. Marketing people are paid on achieving their budgeted lead flow in the long run.</p>
<p>Table</p>	<p>Service Delivery Model</p>	<p>We have service delivery strategy making it with our through customer, the service level, service or more you depending on the size, complexity and the time to fill</p>	<p>We have the strategy making it with our through to fill it with our through to fill it</p>	<p>When things at the beginning will the customer offer opportunities that the TSP company will. In addition, customer can have that the TSP provides them that just before to take. Lastly to implement and it will be an effective technology stack, and ultimately utilize the Project Service team. The TSP team will only get you approval to capital and operating budget. The customer is a volume of activity. Significant customer value is completely. These activities don't be associated with time that it makes you get it, and you get it.</p>

The OML scale looks at the operational characteristics of TSPs and rates them on a scale of 1-5 on their ability to operate their businesses in an optimal way, ultimately reflected by their profitability. The OML scale is detailed in the Appendix.

How does OML improvement align with Modes mindset to benefit partners?

Your Mode defines what your goal or purpose is, in owning a TSP company. Are you just starting out? Are you seeking a steady work/life balance? Are you trying to build stock value over time? Are you trying to drive high growth in stock value over a shorter period of time?

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Any of these would mean to own a TSP. And, from many years, owners may not do Modes as their goals change.

The benefit of O&M, improvement is that regardless of your Mode, improving your O&M, makes it more likely that you will reach the goal of your Mode faster, with less resource and risk, and with fewer blind steps.

None of the Modes are easy paths to success - the nature of owning a TSP business makes this so - but they are all achievable and less risky by increasingly testing and adopting the proven best practices for your P&M. That is the purpose of the O&M approach:

- O&M, Assessment to what extent do your management methods resemble the high performers or low performers in your P&M, and
- O&M, Diagnostic to do your specific O&M, what are the specific steps you can take, in order of likely return on invested effort, to drive up your O&M, and do things more like the top performers do.

What can I do to improve my O&M, within my Mode?

Benchmark your TSP with the Service Leadership Index, use SLD, join an Eureka peer group and/or work with one of the Service Leadership Certified consultants and peer group operators worldwide.

"The key here is the Modes aspect. You have to know where you are going. Just the fact that you know where you are going, you've defined where you are going, your people know, your planning is pointed that way, your attainment tracking is pointed at that, your ConnectWise resources are pointed at where you want to go, then you are much more likely to get there. Operational Maturity Level is the step-by-step way to do it."

- Paul Dippell, VP, Ecosystem Evangelism, ConnectWise

Modes Resources

Modes Theory™

- [Mode Theory™ Assessment](#)
- [Modes Theory webpage](#)
- [Modes Theory Partner videos](#) (showcasing all Modes)

Service Leadership

- Service Leadership Index 2021® Annual Report Bundles ([Download](#) a 10-page excerpt from the Annual Report.)
- [Determine your Predominant Business Model \(PBM\) and learn more about OML.](#)
- [Learn more about Predominant Business Models.](#)

IT Nation

- IT Nation [Evolve Peer Groups](#) (designed for all Modes)
- IT Nation [Share Groups](#) (designed for all Modes)
- [IT Nation Connect](#) and [IT Nation Secure](#) events (designed for all Modes)

ConnectWise Partner Program/Cybersecurity

- [ConnectWise Partner Program](#) for Cybersecurity
- [IT Nation Certify](#) cybersecurity training

ConnectWise University

- Partner Kit: [Security](#)
- Partner Kit: [Operational Maturity](#)
- Partner Kit: [Mergers and Acquisitions](#)
- Modes Webinars and Lessons

ConnectWise Colleague and Ecosystem Engagement

- ConnectWise Account Managers
- ConnectWise Partner Success Managers
- ConnectWise Business Consultants
- Align with Strategic Planning Methodologies (EOS, StratOp, Strategyzer)

About Modes Theory

The Modes Theory Assessment is an ongoing tool for TSP owners, leaders, and ecosystem partners. The assessment was launched at IT Nation Connect in November 2021 and is currently in its third revision.

The assessment currently produces four data points which are maintained by ConnectWise for use by colleagues:

1. Assessment Date
2. Modes Mindset
3. OML Score
4. Opt-in Response

As you saw by completing the assessment, the Opt-in response included this note: “By taking the Modes Theory™ Assessment ConnectWise will record your completion date, Modes Mindset, OML score, and Opt-In response - not the full Modes Assessment Report you may download next. If you agree to share your Assessment, ConnectWise may share your Assessment results with key colleagues for the reasons described above and below.”

The full Modes Theory Assessment Report PDF is available to key colleagues for respondents who opt-in to sharing.

Please contact Scott Scrogin (SScrogin@ConnectWise.com) if you have questions.

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