

2024 Prospectus

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NORTH AMERICA



IT NATION™ Evolve

Peer Groups by  CONNECTWISE®

2024

IT Nation Evolve is an annual membership program designed to help leaders navigate their business journey through peer group interactions. Our members are among the highest in growth and have the largest profitability percentages in the industry. With different peer groups designed to fit their schedule and meet their business needs, we are here to help them succeed in their personal and professional life.

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Top 3 Reasons Members Join



When we talk to members before they join the community, they are asking the following questions:

- 1** As a leader, I feel isolated. Who can I talk to about my business decisions?
- 2** Who can I trust to hold me accountable to my goals?
- 3** Wouldn't it be nice to have answers to challenges other business owners are facing?



What will you get out of sponsoring IT Nation Evolve?



Meaningful and long-lasting relationships with Technology Service Providers (TSPs) within the industry community.



Industry insights from "best-in-class" TSPs according to the Service Leadership Index® (S-L Index™).*



Invaluable feedback from key client profiles in regards to products, solutions, and services.





PEER GROUP DESCRIPTIONS

Evolve 1*

Virtual Only offering for IT solution providers (TSPs) in the range of \$250K+ ARR with at least two full-time employees. Members joining the Evolve 1 program have a desire to grow their business to \$1M+ and are not able to commit to quarterly in-person meetings. The Evolve 1 peer group meets virtually each month.

Evolve 2

The **Evolve 2** program sets our new Evolve members of at least \$1M+ ARR on a course of maturing their businesses while instilling foundational elements of success for Evolve. Members generally spend at least one year in Evolve 2 before being placed in their Evolve 3 peer group. The Evolve 2 Peer Group meets four times in-person.

Evolve 3

Evolve 3 peer groups are comprised of technology service providers of \$2M+ ARR and up. These peer groups are designed to help leaders reach their desired growth and outcomes for both business and personal legacies. The Evolve 3 peer groups meet four times in-person.

CFO (North America Only)*

The **CFO peer group** is comprised of individuals in roles that range from bookkeeping to a true CFO. Discussions center around the financial understanding of running an MSP. Other topics of interest include invoicing, taxes, collections, reporting, and procurement related solutions. The CFO Peer Group meets four times per year in-person.

COO (North America Only)*

COO peer group members oversee all post sales activities with a heavy emphasis on budgeting and reporting. Discussion in group often centers around operational efficiency. The COO peer group meets four times in-person.

Cybersecurity*

The **Cybersecurity peer group** meets with the purpose of discussing security-related initiatives such as compliance, insurance, training, and legal advice. Members of the Cybersecurity peer groups vary in job title but share the responsibility of making security their focus. The Cybersecurity peer group meets four times in-person.

Sales Leaders*

Members of the **Sales peer group** vary from sales managers to quota-carrying individuals. Popular topics discussed include sales and marketing tools, sales reporting, QBR tools, and post-sales handoff. The Sales peer group meets twice in-person and twice virtually.

Service Leaders*

Members of the **Service peer group** vary from dispatchers to service managers. Members of this group are often tasked with sourcing and vetting solutions for their service organization. Valuable content for these groups would include solutions around service delivery, operational efficiency, reporting, and much more. The Service peer group meets twice in-person and twice virtually.



* Additional sponsorship may be required



| DELIVERABLE | DESCRIPTION | PRICE | DIAMOND + Only available to Certified Integration partners | DIAMOND | PLATINUM | GOLD |
|--|---|------------|---|-------------|--------------|--------------|
| | | | \$90,000.00 | \$70,000.00 | \$50,000.00 | \$45,000.00 |
| YEARLY DELIVERABLES | | | 2 AVAILABLE | 7 AVAILABLE | 15 AVAILABLE | 15 AVAILABLE |
| Onboarding | Initial meeting with your sponsorship manager to collaborate and understand deliverables. Be prepared to provide information to maximize your sponsorship ROI. Expect to leave the onboarding meeting with a deeper understanding of the IT Nation Evolve community. | N/A | x | x | x | x |
| Virtual Solution Partner JumpStart | Gain a deeper understanding of your deliverables and how to maximize your sponsorship by building relationships and understanding IT Nation Evolve community literature.* | N/A | x | x | x | x |
| Quarterly Evolve Meeting Attendance | Bring your team to attend each quarterly event. Additional attendee passes are available for purchase. | N/A | 4 | 3 | 2 | 1 |
| Additional Attendee Fee | A maximum of two (2) additional attendees is allowed per sponsor, per quarter.* | \$1,000.00 | | | | |
| Solution Partner Newsletter | Stay current with observations from the channel, including insights into member trends and issues each quarter. Task reminders and upcoming event information will also be shared. | N/A | x | x | x | x |
| Solution Partner Directory | The directory is accessible for IT Nation Evolve members to learn about your offerings. Includes links to your website, contact information, and the latest updates provided by your team.* | N/A | x | x | x | x |
| Solution Partner Directory Updates | Provide monthly updates to be shared on the solution partner directory throughout the year. Subject to ConnectWise approval. | N/A | x | x | x | x |
| Company Spotlight in Evolve Member Newsletter | Highlight your company in one (1) IT Nation Evolve member newsletter. Sponsor to provide copy and images for the spotlight. ConnectWise must approve it. Click and open rate data to be supplied to Solution Partner upon request. Must be a Certified ConnectWise Invent integrator. | \$5,000.00 | x | | | |
| Event Calendar Directory | Promote your hosted events and webinars on our ConnectWise Virtual Community calendar annually. Subject to ConnectWise approval. | Exclusive | x | | | |
| Exhibitor Marketing Kit | Exhibitor marketing kit (EMK) includes a video library and various tools to help you be successful at IT Nation Evolve meetings. | N/A | x | x | x | x |
| Member Data Updates | Quarterly member data delivered as summary benchmarking reports prepared by Service Leadership Inc. | Exclusive | x | | | |
| Subject Matter Expert Eligibility —NEW | Includes the opportunity to submit subject matter expert (SME) session topics to be shared as thought leadership with IT Nation Evolve peer groups. SME sessions are not guaranteed and are subject to peer group requests. | N/A | x | x | x | |
| Solution Partner Peer Group | Want to enjoy the same peer group experience our members do? Please talk with your sponsorship manager today about your options to join one of our solution partner peer groups. Subject to space availability. | \$2,000.00 | x | x | x | |





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|--|---|-------------|-------------|-------------|-------------|-------------|
| DELIVERABLE | DESCRIPTION | PRICE | \$90,000.00 | \$70,000.00 | \$50,000.00 | \$45,000.00 |
| CONTENT INTERACTIONS & NETWORKING | | | | | | |
| Lunch & Learn with Evolve 2 or 3 | Interaction with an IT Nation Evolve peer group to share subject matter expertise and educate the group about products and offerings. Includes connecting with peer group members at a social dinner or fun outing the evening prior. Feedback survey results will be provided post-event. Hosted peer group evening out is subject to availability. The sponsor maintains responsibility for payment, planning and travel. | \$10,000.00 | 8 | 6 | 4 | 2 |
| Q1 | St. Petersburg, FL - 2/5-2/9 | | 2 | 2 | 1 | 1 |
| Q2 | Dallas, TX - 5/6-5/10 | | 2 | 2 | 1 | 0 |
| Q3 | Denver, CO - 8/5-8/9 | | 2 | 1 | 1 | 1 |
| Q4 | Orlando, FL - 11/4-11/6 | | 2 | 1 | 1 | 0 |
| Lunch & Learn with Role-Based Peer Group | Interaction with a role-based peer group of your choice to share subject matter expertise and educate the group on product offerings. Includes connecting with peer group members at a social dinner or fun outing the evening prior. Feedback survey results will be provided post-event. Hosted peer group evening out is subject to availability. The sponsor maintains responsibility for payment, planning and travel. Dates and locations vary by peer group. | \$10,000.00 | 4 | 2 | 0 | 0 |
| Community Day Sessions Attendance | Attend our IT Nation Evolve Community Day (Wednesday) for thought leadership and business maturity sessions each quarter. Q1, Q2, and Q3. | N/A | x | x | x | x |
| Community Day Quick Fire | Highlight your company one (1) time per quarter in a timed session during Community Day. Q1, Q2, and Q3. | \$5,000.00 | x | x | | |
| Welcome Receptions Attendance | Join the member community for networking welcome receptions before leaving for hosted dinners. Monday and Thursday evenings each quarter. | N/A | x | x | x | x |
| Solution Partner Lounge | Plug in, unwind, and collaborate with the IT Nation Evolve community in our new dedicated solution partner lounge. Complimentary coffee, tea and filtered water will be provided. Space is subject to availability and is first come, first served. | N/A | x | x | x | x |
| Peer Group Matching & Strategy with Evolve Leadership | Develop a plan with IT Nation Evolve leadership to strategically engage with specific groups and group profiles in the IT Nation Evolve community. Sponsorship includes a virtual 1-hour meeting each quarter. | Custom | x | | | |
| Networking Event (Q1) | Kick off the year with a welcome celebration! Join us Wednesday night for an opportunity to join the member community for an evening of food, fun, and networking. | N/A | x | x | x | x |
| Tabletop Networking Event (Q2) | Attend a networking event and meet the members in a social, relaxed setting. Includes tabletop exhibit time and on-site signage on Wednesday evening. | N/A | x | x | x | x |





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| CONTENT INTERACTIONS & NETWORKING | | | | | | |
| Annual Golf Tournament | Solution Partners will host an afternoon excursion of golf with the member community one time per year – a la carte sponsorship is subject to availability. | \$5,000.00 | x | x | | |
| IT Nation Gives Event (Q3) | Participate in a philanthropic activity with members. Sponsorship includes event attendance and charitable donation (time or materials) on behalf of IT Nation Evolve to the beneficiary. | N/A | x | x | x | x |
| Networking Event (Q4) | Close out the year with an end-of-year party! Join us for an opportunity to join the member community for an evening of food, fun, and networking. | N/A | x | x | x | x |
| Role-Based Peer Group Summit 2024 | Takes place on December 11, 2024, in Phoenix, AZ. Allows you to connect with service and sales leaders while they come together for thought leadership. Includes tabletop networking time throughout the day, a quick-fire timed pitch from the main stage and on-site signage—a la carte sponsorship is subject to availability. | \$5,000.00 | x | x | | |

| ON-SITE BRANDING & PROMOTION | | | | | | |
|---|--|------------|---|---|---|---|
| Partner Member Testimonial | Our team schedules time with a member of your choice and creates one (1) testimonial video that tells your story to your future partners. Solution partner selects the IT Nation Evolve member partner, and we do the rest, sending you a finished video that you can use anywhere. We also post it internally on the virtual video library. | \$5,000.00 | x | x | | |
| Company Logo on IT Nation Evolve Website | Your logo will be featured on IT Nation Evolve 2024 sponsors website with a pop-up company description and link to a website of your choice. | N/A | x | x | x | x |
| Company Logo on Event Signage | Your company logo will be featured on IT Nation Evolve on-site signage. | N/A | x | x | x | x |





| DELIVERABLE | DESCRIPTION | PRICE |
|--|--|-------------|
| A-LA-CARTE OPTIONS | | |
| <small>*A-LA-CARTE OPTIONS ARE ONLY AVAILABLE AS ADD-ONS TO SPONSORSHIP PACKAGES AND ARE SUBJECT TO AVAILABILITY</small> | | |
| Additional Attendee Fee | A maximum of two (2) additional attendees are allowed per sponsor per quarter. <i>Available for multiple IT Nation Evolve programs.</i> | \$1,000.00 |
| Breakfast Sponsor | Sponsor breakfast on one day during an IT Nation Evolve meeting week. Sponsorship includes on-site signage. Sponsors may send branded materials and giveaways to be placed at breakfast tables. | \$7,000.00 |
| Community Day Breakfast Sponsor | Sponsor breakfast on Wednesday during an IT Nation Evolve meeting week. Sponsorship includes on-site signage. Sponsors may send branded materials and giveaways to be placed at breakfast tables. 1 available per quarter. | \$10,000.00 |
| Community Day Outing Sponsor —NEW | Sponsor an outing or activity on Community Day. Sponsorship includes co-branded signage leading up to the event and onsite. ConnectWise to handle event logistics and contracting. | \$15,000.00 |
| Community Day Quick Fire | Highlight your company one (1) time during a quarterly meeting with a timed session during Community Day. | \$5,000.00 |
| Coffee & Break Sponsor | Sponsor the morning coffee, mid-morning break, and afternoon break for one Quarterly Meeting. Includes on-site signage. Sponsor may send branded materials and other giveaways. <i>Available for multiple IT Nation Evolve programs.</i> | \$5,000.00 |
| Company Spotlight in Evolve Member Newsletter | Highlight your company in one (1) Evolve member newsletter. Sponsor to provide copy and images for spotlight. Must be approved by ConnectWise. Click and open rate data to be provided to solution partner upon request. Must be a Certified Invent integrator. <i>Available for multiple IT Nation Evolve programs.</i> | \$5,000.00 |
| Evolve 1 Access | Sponsorship includes branded PPT slide in virtual Evolve 1 meeting slide deck & 30-minute presentation to the Evolve 1 community during one of their monthly meetings. | \$5,000.00 |
| IT Nation Gives Event Sponsor —NEW | Participate in the philanthropic activity with members during our Q3 meeting. Sponsorship includes co-branded signage (virtual and on-site). Also includes a five-minute speaking spot before the activity starts. | \$5,000.00 |
| Meeting Room Drop | Solution partner provides a branded item or giveaway to be placed in each peer group meeting room at one (1) quarterly meeting of your choice. ConnectWise must approve items. <i>Available for multiple IT Nation Evolve programs.</i> | \$5,000.00 |
| Networking Outing Sponsor —NEW | Sponsor an outing or activity during an Evolve meeting week. Sponsorship includes co-branded signage (virtual and on-site). ConnectWise to handle event logistics and contracting. <i>Available for multiple IT Nation Evolve programs.</i> | \$10,000.00 |
| Networking Welcome Reception Sponsor | Sponsor both nights of the Welcome Reception (Monday and Thursday evening). Includes on-site recognition and tabletop time during the reception. Sponsor may send branded materials and giveaways. 1 available per quarter. <i>Available for multiple IT Nation Evolve programs.</i> | \$10,000.00 |



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| A-LA-CARTE OPTIONS | | |
| <small>*A-LA-CARTE OPTIONS ARE ONLY AVAILABLE AS ADD-ONS TO SPONSORSHIP PACKAGES AND ARE SUBJECT TO AVAILABILITY</small> | | |
| Lanyard Sponsor | Your logo featured on the event lanyard given to each attendee at every in-person Evolve meeting in 2024. | \$10,000.00 |
| Registration Sponsor—NEW | Sponsorship includes co-branding on registration page leading up to one (1) quarterly event, as well as on-site digital signage at check-in. Sponsor may send branded materials and giveaways to be passed out at Registration. Must be approved by ConnectWise. <i>Available for multiple IT Nation Evolve programs.</i> | \$10,000.00 |
| Room Key Sponsor | Custom design printed on back of room keys at conference hotel as permitted by hotel policy. Front of key will be IT Nation Evolve branded. 1 per quarter. <i>Available for multiple IT Nation Evolve programs.</i> | \$5,000.00 |
| Stress Ball Sponsor—NEW | Your logo to be placed on stress balls included in each meeting room during the year. | \$5,000.00 |
| Sponsor Webinar Promotion—NEW | Promotion of sponsor-hosted webinar included in Evolve member newsletter and our upcoming webinars directory within the virtual community. Solution partner manages the registration process, hosts, and presents the webinar. Click and open rate data to be provided to Solution Partner upon request. | \$5,000.00 |
| Solution Partner Peer Group | Want to enjoy the same experience our members do? Talk with your sponsorship manager today about your options to join one of our solution partner peer groups. Subject to space availability. | \$2,000.00 |
| SWAG Bag Sponsor—NEW | Send prepared swag bags for IT Nation Evolve to distribute to all members in their meeting rooms during one (1) quarterly meeting. Items and bag must be approved by ConnectWise. <i>Available for multiple IT Nation Evolve programs.</i> | \$10,000.00 |
| Tabletop Networking Bag Sponsor—NEW | Your logo featured on the co-branded event bag given to attendees during the tabletop networking event. Sponsor has option to have a small collateral piece or promotional item to be placed in every registration bag. Item must be approved by ConnectWise. <i>Available for multiple IT Nation Evolve programs.</i> | \$5,000.00 |
| Wi-Fi Sponsor | Your logo featured on event signage. Your choice of password for the attendee Wi-Fi. Must fit password requirements and be approved by ConnectWise. 1 per quarter. <i>Available for multiple IT Nation Evolve programs.</i> | \$5,000.00 |

