Sand Cherry
Associates

Strategic Solutions. Smart Execution.

Sand Cherry Associates
- New Contractor Welcome Kit -
2016

List of Documents

The following is a list of documents that accompany this presentation.

List of Documents	Action Required*
1. Independent Contractor Agreement	Please email documents to Kim Wharton: kwharton@sandcherryassociates.com and copy Kathy Reilly: kreilly@sandcherryassociates.com
2. Non-disclosure Agreement	
3. Background Check Consent Form	
4. Direct Deposit Form	
5. W9	
6. Sand Cherry Bio Template	
7. Expensify Instructions	
8. Sample Contractor Invoice	
9. Sand Cherry Blank Slide Template	
10. Sand Cherry Letterhead	
11. Sand Cherry Excel Template	
12. Sand Cherry Word Template	
13. New Team Project Team Member Check-list	

*Mail hard copies to:
Kim Wharton
8 Sand Cherry
Littleton, CO 80127

Agenda

- **Company Overview**

- Policies and Paperwork

- Technology Support

Sand Cherry Associates In a Nutshell

OUR VALUE PROPOSITION

> *"Through a unique combination of consulting expertise and deep industry experience, we specialize in working collaboratively with clients to develop and 'smartly' execute strategic initiatives."*

WHO WE ARE

Premier market strategy and business operations consultancy serving the telecom, broadband, and media industries in North America and Europe

Design best-in-class business strategies, lead major tactical initiatives and develop effective operational solutions

Integrate strategic insights with operational execution

Data-driven, market-proven approach

Sand Cherry ASSOCIATES

Strategic Solutions. Smart Execution.

"WE HELP COMPANIES GROW THROUGH SMART EXECUTION"

SAND CHERRY PRACTICE AREAS

PRODUCT & MARKETING

FOCUS AREAS

Product Strategy	Product Marketing	Product Lifecycle Management

ACQUISITION & RETENTION

FOCUS AREAS

Sales Channel Management	Customer Retention	Customer Lifecycle Management

BUSINESS OPERATIONS

FOCUS AREAS

Customer Operations	Business Operations	Supply Chain

CONSULTANT CORE COMPETENCIES (C³ FOUNDATION)

"Strategic Solutions"	STRATEGY DEVELOPMENT	• Competency Owner • Tiger Team • Certification & Training • Quality Assurance
"Data-Driven Approach"	DATA ANALYTICS	• Competency Owner • Tiger Team • Certification & Training • Quality Assurance
"Smart Execution"	PROJECT MANAGEMENT	• Competency Owner • Tiger Team • Certification & Training • Quality Assurance

How Do We Support Our Value Proposition?

Strategic Insight

Our deep industry knowledge and broad perspective deliver the insights our clients need to formulate innovative business directions that can drive immediate impact and business growth.

Thought Leadership

Our consultants offer rich experience and strong functional capabilities to complement client teams and deliver solid solutions to even the most complex initiatives.

OUR VALUE

Business Results

Sand Cherry consultants take a customized approach to meeting our clients' business needs. Our real life experience and hands-on approach deliver results that are operationally viable and market-ready.

Dedication and Performance

We approach business initiatives with a collaborative spirit and an undeniable work ethic. We are committed to surpassing expectations and helping clients accomplish their business goals.

Who Are Our Clients?

Our clients include leading cable, broadband and telecom providers in North America and Europe, as well as leading media companies and industry-focused investment firms.

- Broadband service and telecom providers, network operators, and media companies on a global basis

- Core focus on leading North American and European cable, telecom and broadband providers

- Key technology and marketing associations supporting these industries

- Leading content and media companies

- Internet infrastructure providers

- Leading private equity and VC firms

SELECT REPRESENTATIVE CLIENTS

What are Sand Cherry's Core Values?

Core values reflect what is truly valuable to an organization; core values do not change over time and are the underpinning of a company's culture.

Our Work

1. Our success is based on the dedication and work ethic of our people, the sustained quality of our work and the clear business results we generate for our clients.
2. We strive to consistently deliver the highest quality work product for our clients and to demonstrate thought leadership and attention to detail in everything we do.

Our Ethics

3. We hold ourselves to the highest ethical standard and treat everyone with honesty and integrity, regardless of circumstance.
4. We show respect for our team members, our clients and ourselves in the work that we do and how we treat each other.

Our Team

5. The firm is a business but our people are a family.
6. Our people are our core asset and we strive to value, respect and nurture their abilities and needs each and every day.
7. We place a strong emphasis on work-life balance and making the management consulting career sustainable, enjoyable and rewarding.
8. This is reflected in our virtual work environment where our team has autonomy and control over their daily schedules and our trust that they will manage their workload effectively and deliver the quality work product our clients expect.
9. We foster an environment of continuous learning and development that will make our team better at their jobs and more fulfilled in their careers.

What *is* a Sand Cherry?

The Western Sand Cherry, *prunus beseyi*, is a highly resilient flowering shrub native to Colorado.
It is recognized for its ability to thrive under a wide range of extreme conditions, including drought and freezing temperatures.
It produces a cherry-shaped fruit which is relished by songbirds.

Similarly, the value Sand Cherry Associates delivers for our clients is rooted in the ability to develop actionable solutions that deliver business results in rapidly evolving and increasingly competitive environments.

Sand Cherry Positioning: The 15-Second Elevator Pitch

When describing Sand Cherry, you should hit on four key points: who we are, what we do, why we are unique and what you are currently doing.

Key Point	Potential Answers
Who we are	• Management consulting firm that specializes in the "broadband ecosystem." • Support top telecom, media, and broadband companies in North America and Europe. • Our clients include the leading cable, telecom, wireless, network-based services, media, and infrastructure players in this space.
What we do	• We help our clients to successfully develop and implement key strategic initiatives, from the initial strategy and planning, through execution and market launch. • Offer soup to nuts support, from developing strategies to executing the implementation of the strategies. • We work across a range of areas, from competitive strategy to supply chain implementation to new product development. • Our core areas of expertise and focus include business and competitive strategy, new product development and marketing, sales and retention strategy, and business and customer operations optimization.
Why we are unique	• Our firm is made up of industry veterans who have extensive experience working on both the client and corporate side. • Our team is a unique combination of seasoned management consultants and senior industry leaders. • Our projects focus on creating market-ready solutions. • We know your business and can hit the ground running to get you quick results.
Right now I'm….	• Nothing confidential!

Sand Cherry's Leadership Team

Sand Cherry
ASSOCIATES
Strategic Solutions. Smart Execution.

Duane Dick, Senior Partner
- Executive Director, Market Strategy Development, AT&T Broadband & MediaOne
- Consultant, Price-Waterhouse
- MBA, Georgetown University

Robert Wharton, Senior Partner
- Director, Market Strategy Development, AT&T Broadband & MediaOne
- Consultant, International Technology Consultants
- MBA, Wharton School of Business (UPenn)

Dan Hillen, Partner
- VP, Alternative Sales Channels, QWEST
- VP, Sales Channel Strategy, AT&T Broadband & MediaOne
- General Manager, Sales, One2One Wireless (UK)

Audley Webster, Advisor to the Board
- Board Member, Time Warner Telecom
- VP, Corporate Strategy, MediaOne & US WEST
- Principal, Booz-Allen & Hamilton
- MBA, Harvard University

Lisa Boland, Partner
- Market VP, Sales & Customer Operations, AT&T Broadband
- RVP, MediaOne
- VP, Sales & Customer Operations, MediaOne

John Calhoon, Partner
- Senior Director Product Management & Marketing, Inflow
- Director of Business Development, Jato Broadband
- Director, Market Strategy, AT&T Broadband
- VP of Sales, TCC Publishing
- MBA, Stanford University

Edric Starbird, Vice President
- VP Operations, MediaOne, Verio
- Consultant, ATKearney, EDS-MCS Consulting
- BS Engineering, Stanford
- MBA, Columbia University

Michiel Sanson, Vice President
- AVP, Marketing Research & Strategy, Dex One
- Senior Associate, Booz·Allen & Hamilton
- MBA, Wharton School and MA International Studies, UPenn

Jennifer Bartlett, Vice President
- VP, Programming & Product, Time Warner Cable
- Director, Integrated Product Management, AT&T Broadband
- Director, Sales Channel Strategy, MediaOne
- MBA, University of Chicago

Eric Gutierrez, Vice President
- SVP, Marketing, Allconnect
- VP, Marketing, Whitefence.com
- VP, Marketing & Business Development, LendingTree.com
- Senior Product Manager, AOL
- George Washington University Medical School
- University of Virginia

Carolyn Rumbarger, Vice President
- Regional VP, Marketing, Comcast
- Director, Marketing, Continental Cablevision/MediaOne
- MA, Dayton University
- Executive Marketing Series, Harvard Business School

Maria Kernen, Vice President
- Vice President, Customer Operations – NTT/Verio Web hosting
- Director, Enterprise Operations, MediaOne
- MBA, Stanford University

Sand Cherry's Operating Model

We provide consulting services on a global basis; our team is geographically distributed and works under a virtual operating model.

- US operations based in Denver, Colorado

- Clients located across North America and Europe

- Virtual office operating model

- Strong emphasis on company-wide idea exchange and resource development

- Adaptable team structures depending on assignment

Consultant Locations
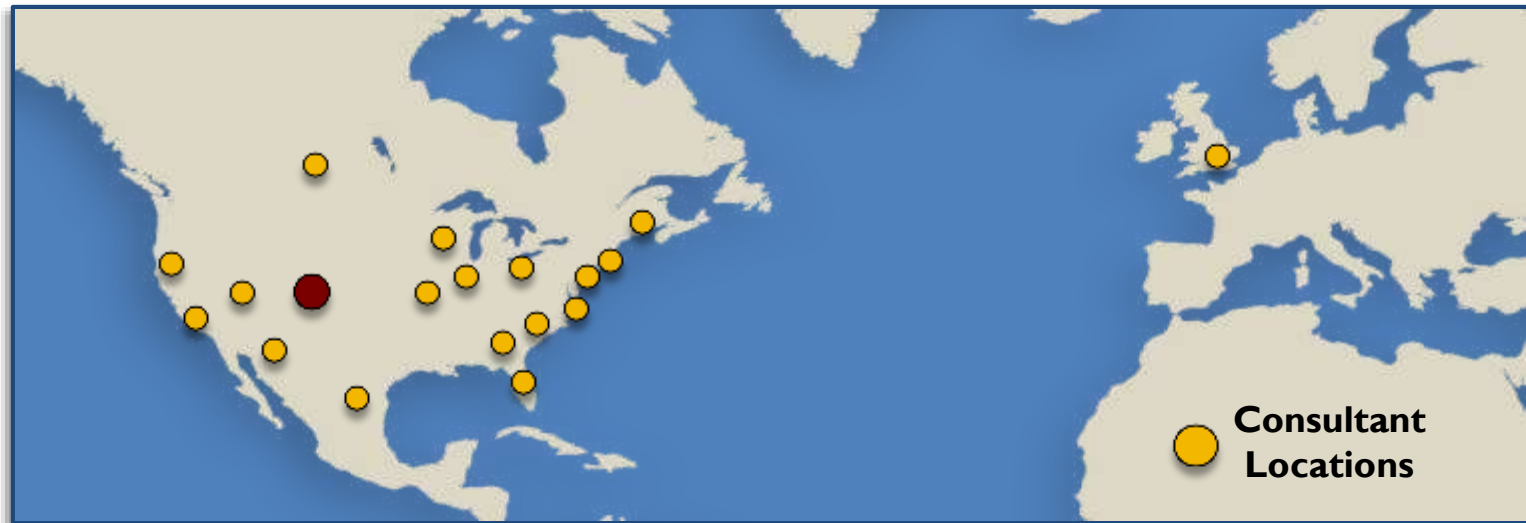
Point People for Key Functions

Function	Name
Partner Team	• Robert Wharton • Duane Dick • Dan Hillen • John Calhoon • Lisa Boland
Recruiting	• Kim Wharton/Kathy Reilly
Expenses/Invoices	• Michelle Dick
SharePoint	• Rick Collman • Robert Wharton
Accounting / 1099	• Michelle Dick
Email Setup	• Kim Wharton
Misc. Administration	• Kim Wharton

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- Policies and Paperwork

- Technology Support

Business Entity Policy for Contractors

Sand Cherry requires all contractors to establish themselves as a business entity **within the first 30 days** of being placed on a project.

- It is our company's policy to work with established businesses in the form of corporations, partnerships, and Limited Liability Companies (LLC's)

  - Such entities are responsible for their own trade names, insurance, worker's compensation, equipment, taxes, etc.

  - Following the end of each tax year, you will be issued a 1099 which will include everything Sand Cherry has paid you during that year, including reimbursed expenses

  - As a business entity, you should be able to deduct most or all of your reimbursed expenses when you file your taxes

  - Consult your legal and tax advisors for more information on the above

- The W9 should be filled out with a Federal Tax ID number which can be acquired through becoming a corporation, partnership, LLC, etc.

- Our clients require background checks; please fill out the release form and send back to Kim Wharton.

Expense Policy Overview

Contractors book their own travel and pay for their own company expenses and are reimbursed by Sand Cherry.

Expense Policy

- **Airfare:**
  - Due to strict change/refund policies, never use third party websites such as Expedia or Travelocity to book your travel.
  - Only economy class airfare is allowed.
  - Extra charges for baggage check and guaranteed seat assignments are reimbursable but upgraded leg room/class is not.
- **Hotel:**
  - Whenever possible, choose a client approved hotel using the client's corporate rate.
  - Reimbursement of mini/honor bar items, including water, as well as in room movies is not allowed.
  - If meals are charged to your hotel folio, then the expense will need to be split into two separate categories in Expensify.
  - If parking or internet is also charged to your hotel folio, please do not split the expense and include it all under hotel
- **Car Rental**
  - Only mid-size car rental and smaller is reimbursable.
  - Do not add on any insurance options as Sand Cherry's as well as your own insurance policy should cover any incidents.
  - Do not choose the pre-paid fuel option or allow the rental car agency to re-fuel the car.; always, re-fuel on your own prior to returning your car.

- **Mileage**
  - As of January 1st, 2016 the mileage reimbursement rate is .54 cents per mile.
  - When using Expensify, choose the Mileage tab and Expensify will calculate the distance /rate for you.
- **Meals**
  - Travel meals are kept to an average of $50 per day.
  - In addition, any one meal cannot exceed $50 (If you have a meal over $50, you can ask for reimbursement but only up to $50)
  - If you share a meal with another consultant, please split payment of the bill. Otherwise, you may pick up the whole expense but only if the consultant is on the same project as you. List all who attended.
- **Client Meals and Entertainment**
  - Client meals and entertainment are only reimbursable when approved in advance. List all who attended. The average cost of entertaining a client should not be more than $75 per person.
- **Internet / Cellular**
  - Airline WiFi is reimbursable if client asks that you have access while traveling.
  - Home internet and cellular phone charges are not reimbursable.
- **Supplies**
  - Only supplies used for presentation materials are reimbursable. General supplies such as pens, paper, printer ink are not.

Expensify is Sand Cherry's new method for submitting expenses.

- Expense reports may be submitted after every trip but no later than the 1st of the month for the prior month's expenses.

  - Any prior month's expenses submitted after the 1st will need approval and are subject to not be reimbursed depending on the client requirements.

- Go to www.expensifiy.com and sign up using your Sand Cherry email address. In the upper right hand corner of the Expensify website, you can access help for instructions on how to use Expensify.

- Expenses can also be created on the go with the Expensify mobile app.

- In general, any expense reports sent by Monday, will be paid on Friday. Any reports sent after Monday, will not be paid until the Friday of the following week. You can submit reports every week or you can hold them and submit once a month.

Pay Policy and Procedures

- Contractors should submit their invoices to *invoices@sandcherryassociates.com* and to the partner overseeing the project

  – Invoices **MUST** include time, amount owed, and project number

- We pay contractor invoices semi-monthly on the 15th and the 30th or the banking day before if the 15th and the 30th fall on a weekend or holiday

- Your invoice must be received at least two business days prior to payday and include estimated hours through the end of the pay period

  – If you miss the payment cutoff, you will not be paid until the next Friday.

- The Sand Cherry project number must be included on all invoices and expense submissions. If you don't know your project number, contact Kim Wharton kwharton@sandcherryassociates.com

- Invoices are paid via direct deposit to your bank account listed on the direct deposit form

Direct Deposit Form

Your Sand Cherry Bio

Every Sand Cherry consultant has a personalized Sand Cherry bio which is used to staff projects and allow clients and potential clients to understand the capabilities of our team.

- Please see the Virtual CV link for creating your personalized Sand Cherry Bio.

Sand Cherry New Business Opportunity Program

One of the best sources for New Business Opportunity Leads comes from Sand Cherry team members through daily client engagement.

We recognize and reward employees and contractors who identify New Business Opportunities three ways:

1. **Initial Lead**: When you identify a potential need for support or project we will pay **$300** per lead. *Leads must be qualified by a Sand Cherry Partner.*

2. **Statement of Work (SOW)**: If the initial lead evolves to a Sand Cherry Partner or Principle writing an SOW we will pay you an additional **$500** per written SOW.

3. **Project Approval**: If the SOW is approved by the client and Sand Cherry gets an SOW signed or PO we will pay you an additional **$700.**

> ## Submit New Business Opportunity Leads to
> **leads@sandcherryassociates.com**

Finding Great New Cherries: How You Can Help Us

The flip-side of the coin is just as important. To take advantage of new opportunities, we need your help to find great new people to join our team!

- Sand Cherry is always looking for well-qualified individuals who are interested in being management consultants in the broadband, telecom and media fields

- Our best success finding new talent has primarily come from people that our team members know personally

- If you know someone who shares your (and our) passion for consulting and would like to be a part of our team, have them contact Kim Wharton at careers@sandcherryassociates.com
  - You will receive a **$200 bonus per referral** if the referred candidate is successfully placed on a project
  - You will receive another **$200 once the candidate successfully completes 30 days** on a project

- We are currently looking for individuals with strong backgrounds and expertise in:
  - Project management
  - Product planning and development
  - Marketing and sales operations
  - Digital sales and care channels (.com, e-tail, web, mobile etc.)
  - Business and customer operations, including customer care, technical operations, information and knowledge management systems and supply chain logistics

- What kind of individuals are a great fit?
  - Someone who is "high horsepower," highly analytical self-starters who can operate equally well in both team and self-directed roles.
  - Someone with specific expertise with versatility across multiple disciplines (strategy, marketing, operations, etc.) so they can interface effectively with multiple types of constituencies and stakeholders within a client organization.
  - Someone with strong program/project management skills.

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- Technology Support

Tech Support Overview

SWI provides our team with tech support related to:

- Office 365 - including Exchange e-mail, Lync, SharePoint, and mobile device set-up and support
- Microsoft Office, Windows and other Microsoft software support
  - This does not mean that you should call SWI if you want to know how to do something in Excel or PowerPoint
  - **Do not call SWI regarding hardware issues**!

Contact Details

- When you contact SWI for tech support, the best approach is to send a calendar invite. This lets them know when you're available and they can work with your schedule.
- You can also call 1-800-774-9187 extension 313 for support – if you can't speak directly to the SWI team or leave a VM.
- Either way, please provide a brief description of the issue, and the BEST phone number to reach you for meeting

Contact Details: Kyai Rosaroso
Software Wholesale Intl.
kyai@software-intl.com
www.software-intl.com
Toll free 1-800-774-9187 ext. 313
Direct Line 888-958-9986
fax 303-682-1506

Tech support from SWI is available Monday through Friday, 7:00 am to 6:00 pm, Mountain Time. Response times should be no more than four hours during business hours, but generally much quicker.

Setting up E-mail and MS Office 365 (1/2)

To set-up email on the Sand Cherry Platform:

- You must have Office 2007 or 2010 (or Office for Mac 2008 or 2011) or 2013 installed on your PC/laptop for the service to work correctly

- First, update the temporary password you got from Sand Cherry and/or the SWI Tech – *NO services are available until the password has been updated!*

  - Go to the sign-in page, https://portal.microsoftonline.com (please bookmark it!)

  - Enter your user name and corresponding temporary password

  - Follow the instructions on the sign-in page to create a new password

  - Once you have successfully changed password you will be logged out

- Next, do required downloads

  - Log back in with your new, updated password

  - You will be at your *Home* screen

  - On the right hand side of the page under *Resources* click on *Downloads*

  - The applicable downloads required to connect your desktop/laptop will be made available

  - Download plug-ins in sequence – these help you connect to cloud services and make secure connection from your machine to services

- If you need further assistance with this process, here is a complete guide:

  - http://onlinehelp.microsoft.com/en-us/office365-enterprises/ff637594.aspx

  - If reboot is required, please do so

  - Once reboot has completed, go back to https://portal.microsoftonline.com and login

Setting up Email and MS Office 365 (2/2)

- Next, access the Outlook Web App for web mail
  - Click on *Outlook* link on top of *Home* page
  - You will be redirected to the entry page for web mail
  - Set time zone appropriate for your location
  - Uncheck the box for low vision unless this applies to you
  - Click *OK* to enter the Outlook web app. You will be able to access e-mail from here prior to integrating email to your local version of Outlook.
- *NOTE: this is not the default/preferred method to connect to e-mail but very handy in disaster, while traveling (no computer), or if you're upgrading your computer and need to access your mail. You should access your mail here prior to integrating Outlook/web client*
- Next, connect Outlook on your computer to the new Exchange e-mail server
  - How to connect **Outlook 2007** to Exchange 1 pager + video
  - http://help.outlook.com/en-us/140/cc511396.aspx
  - How to connect **Outlook 2010** to Exchange 1 pager + video
  - http://help.outlook.com/en-us/140/Dd253202.aspx
  - How to setup **Outlook 2011 for MAC** 1 pager
  - http://help.outlook.com/en-us/140/gg471164.aspx
- Next, integrate your compliant mobile phone to the service using the following wizard.
  - http://help.outlook.com/en-us/140/dd936215.aspx
- Finally, please find the Office 365 help guide here, which covers almost any issue related to Office 365 setup.
  - http://onlinehelp.microsoft.com/en-us/office365-enterprises/ff637580.aspx

Backing Up and Securing Client and Firm Data

All consultants should keep Sand Cherry data and files (and client data, pursuant to client instructions) backed up and secure, in case of a hardware failure.

- All consultants should back up work-related files and data on a regular basis

- Please check with your project manager regarding any specific requirements and/or restrictions your client may have regarding the backing up of data and files

- Both local and cloud-based back-up options should be utilized

  - **Local Back-up:**

    - All consultants should back up their work-related files and data to a portable, external hard drive on a regular basis (at least weekly). A portable hard drive is preferable in case you need access to the back-up while traveling

    - Hard drives needs to be password-protected and encrypted. Please contact Kim Henderson regarding the recommended back-up software for your PC, and proper password protection and encryption protocols

  - **Local Hard Drive Imaging:**

    - In addition to backing up your files and data, you should maintain an up-to-date image of your hard drive, so that if a PC hard drive fails and must be reformatted or replaced, the drive image can be reloaded, restoring data, programs, drivers and settings, getting your PC back to full working order ASAP

    - Please contact Kim Henderson regarding the recommended drive imaging software to use with your PC

  - **Cloud-based Back-up:**

    - In addition to backing up your files and data locally, we recommend that all employees and contractors back-up and/or sync their files and data to a cloud-based storage solution

    - Please contact Kim Henderson regarding the recommended cloud-based storage/back-up/sync options