Book of Business Guide

During our business meeting, we will discuss the top 10 to 20 clients you believe are print-rich and could benefit from Business Document Solutions.

Print Partner
Managed Print Services for MSPs

V1.2

Print-rich clients are multi-location organizations with high monthly print volumes and a mix of A3 and A4 printers and multifunction devices. These often face supply, cost, or compliance challenges in document-heavy workflows.

Helpful Details to Share About the Prospect

All fields are optional except Name and URL.

- Prospect Company Name
- Prospect's Website URL
- Prospect Contact Name
- Contact Information (email, phone number, etc. if client is ready to connect)
- Number of office employees, number of locations (US/Canada? Multi-state/multi-province?)
- Average monthly print spend
- Number of A3 copiers
- Number of A4 printers
- Contracts' End dates
- When should a sales rep contact the client?
- When can we install an agent?
- Opportunity for Paperless Solutions?

Client Strategy, Engagement, and Handoff Process?

Partner Information Sharing: The Partner provides our team with essential client details, including the client's name, website URL, and any other relevant information that supports effective engagement.

Introduction Strategy Development:
Together, we'll develop a tailored engagement strategy for each client or prospect. This strategy may include:

- Sharing Green Office Partner brochures or case studies
- Email introduction campaigns
- Custom PowerPoint presentations
- Newsletter inserts
- Direct conversations with the client
- Additional marketing steps such as:
  - Including the client in relevant webinars or informational sessions
  - Co-branded landing pages or introductory videos
  - Highlighting mutual success stories or value-driven outcomes
  - These steps help clearly position Green Office Partner's value and build trust early in the engagement process.

Green Light to Engage: Once the Partner approves of direct engagement, the opportunity is officially transitioned to the Green Office Partner sales team. At this stage, the sales team will:

- Contact the Partner to confirm any final client details
- Initiate direct outreach to the client

Print Partner Collateral

Printpartner.biz/partner-content

For client-facing decks, one-pagers, and flyers, use this link:
Greenofficepartner.com/collateral

Key Contact

Gerald Toumayan
VP of Channel / COO
(312) 440-1032
gtoumayan@printpartner.biz
www.printpartner.biz
Schedule an Appointment

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Key Questions to Consider for Print Opportunities

Here are some questions to help you uncover meaningful print and document solutions opportunities. Please share any insight on these questions to help create an appropriate go-to-market strategy.

1. Are they **dissatisfied with their print vendor**?
2. Is IT or facilities **frequently dealing with printer issues or break/fix tickets**?
3. Are there signs of **inefficiency** — high toner costs, mixed-brand fleets, no print rules?
4. Are they working with a **copier company that also sells IT services** (potential conflict)?
5. Are they undergoing **visible initiatives** like an office relocation or sustainability push?
6. Do they deal with **complex workflows** like secure faxing, scanning, or compliance (HIPAA, legal)?
7. Are there **workflow bottlenecks** in printing, approvals, or document access?
8. Are there opportunities to introduce **paperless solutions**, such as digital forms, e-signatures, or electronic workflows, to replace manual or paper-based processes?
9. Is this account better suited for a **soft marketing intro** (email, deck) or are they ready for **rep outreach**?
10. Do they trust you enough to take your advice, or would a **consultative session** help open the door to new services?

How to Request a Book of Business Meeting

Need a strategic review?
Request a “Book of Business” meeting by **scheduling an appointment here.**

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