

Agent Service Reference Guide | Consulting Ace Inc.

**WE HELP ORGANIZATIONS OF ALL KINDS,
OPTIMIZE SYSTEMS, BOOST EFFICIENCY, AND MAKE, SAVE, AND
RECOVER SUBSTANTIAL AMOUNTS OF TIME & MONEY.**

👉 Solutions Are 🚫 Zero-Risk 💰 Zero Cost 📊 Performance Based

This document is a tool for you, our Agent, to guide conversations and qualify potential leads. Please use this document solely for your reference; do not send it to prospective clients. Provide your clients with the sales document or other information designed for that purpose. Since this document is subject to updates, always use the latest version—this is **version 5.1**. Reach out if you have any questions.

Sections & Emails:

The critical information you need as an Agent is contained within this PDF, which includes three sections: Links, Services, and Info. Additionally, you will need another document specifically for Emails - Agent Service Reference Emails.

1. **Links:** Key links to ConsultingAce and quick links to locations within this document.
2. **Services:** A quick and detailed list outlining all services and parameters.
3. **Information/Training:** Detailed information on what to do and how to do it.
4. **Emails:** Included in a separate document titled “Agent Service Reference Emails.” This document contains introductory email examples, follow-up email blurbs, and more that you can send to prospects. It is provided in a “docx” format, allowing easier copying and pasting with better formatting than a PDF.

Links to Sections Within This Document & ConsultingAce

This section contains links for quick navigation within this document and to ConsultingAce.com. Use these links and the “Go to Top” link in the bottom right corner to move swiftly, even during a conversation. The Table of Contents at the end of the document also lists all major sections and subsections, with clickable links for easy access. Access the TOC: [The Table of Contents – Click Here.](#)

ConsultingAce Links

Agent Resource Page: <https://ConsultingAce.com/ACE> ← This page includes this document, marketing materials, event signups, key links, and more! Remember our domain name with ACE, and you can access all you need wherever you are.

Long Lead Submission Form: <https://ConsultingAce.com/Lead>

Short Lead Submission Form: <https://ConsultingAce.com/Leads>

New Agent Sign Up <https://ConsultingAce.com/NewAce>

More details on <https://ConsultingAce.com>

Andrew’s Phone & Other Contact Information: [Click Here To Go To Section](#)

Andrew’s Calendar Links

- 15-30 Minutes: <https://consultingace.com/contact-us/book-a-15-to-30-minute-meeting/>
- 30-60 Minutes: <https://consultingace.com/contact-us/book-a-30-to-60-minute-meeting/>

The easiest way to schedule meetings with Andrew and your prospect is to keep Andrew’s calendar open during your conversation. This strategy lets you find and book a convenient time immediately. Tips: ensure the time zone matches your prospects, list them as the primary, and add yourself and others as guests.

Service Suite – Quick/Short List

This section contains the list of services, a few lines of information, and short links to ConsultingAce.com for each service. [The Short List – Click Here.](#)

Service Suite – Full List w/Details

Primary Service Suite: This section provides detailed information on each service, including the processes involved and critical questions to ask.

1. [Government Tax & Incentives](#)
2. [Loans](#)
3. [Workflow Automation](#)
4. [Credit Cards Merchant Services Cost Reduction/Service Improvement](#)
5. [Credit Card Class Action](#)
6. [Telecommunications](#)
7. [Utilities](#)
8. [Commercial Accounts Payable](#)
9. [Payroll Employee Perk](#)
10. [Shipping](#)
11. [Medical Underpayments](#)
12. [Uniforms and Linens](#)
13. [Employment Screening](#)
14. [Strategic Consulting](#) Includes notes about Insurance and Legal services.

Agent Training Links

Within this section, you will find all kinds of helpful information. We cover details that will help you close more deals in a shorter time frame. Be sure to familiarize yourself with everything and refer to it often to keep it fresh in your mind. The more you know, the more you can use it during conversations.

1. [Your Goal](#)
2. [Introduction: The “Movie or Book”](#)

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3. [Introduction: The Consultant](#)
4. [Elevator Pitch / Value Proposition – 4 Versions](#)
5. [Qualifications: The Basics](#)
6. [Foundational Marketing Concepts](#)
7. [Objection Talking Points](#)
8. [List of Services – Copy and Paste](#)
9. [How to Get Started](#)
10. [Types of Organizations We Work With](#)
11. [Prospect Question List](#)
12. [Submit Prospect & Required Information](#)
13. [Prospect Meetings – General Information](#)
14. [Andrew's Contact Information & Meeting Setup](#)
15. [Qualification of Zero Cost](#)
16. [New Referral Agent Sponsorships](#)
17. [Improvements & Your Suggestions](#)

Quick/Short List of Services

Below is a quick list of questions you can use to determine whether someone might need any of the services. Remember, services are zero-cost and performance-based, making them risk-free!

Does The Organization:

Government Tax Incentives and Credits

Own property and/or have employees? (USA)

- Solution: USA Government Business Tax Credits & Incentives Recovery
- Gain easy access to ERC, R&D, WOTC, Cost Seg + 100s more from Federal, State, and local governments in our “QuickBooks”-like solution. Set up a predictable recurring revenue stream today!

-  <https://ConsultingAce.com/Tax> ← ← ← Click to Learn More

Loans and Funding

Need a business loan, commercial real estate loan, financing, a line of credit, or VC Angel Funding? (USA)


- Solution: Business Loans, Financing, and Lines of Credit
- Brokerage 240+ Loan Options | One-Stop Solution

-  <https://ConsultingAce.com/Loan> ← ← ← Click to Learn More

Workflow Automation


Have challenges with information transfers between different software platforms, repetitive manual tasks, working from spreadsheets, and other data processing tasks and reporting? (Global)

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- Solution: Enterprise-level Workflow Process Automation Solution for All Size Organizations
- Remove manual workflows, reduce errors, save time, gain efficiency and productivity, and enable growth and scalability. No Upfront Costs - No Need for Internal IT.
-  <https://ConsultingAce.com/PA> ← ← ← Click to Learn More


Credit Card Processing

Seek cost reduction and solutions for service challenges with merchant services credit card processing (USA, Canada & Global)

- Solution: Merchant Services/Credit Card Processing Optimization & Cost Reduction Service
- Our average reduction of 28% on your credit card processing costs.
-  <https://ConsultingAce.com/Credit> ← ← ← Click to Learn More

Telecommunications, Phone, Internet, Cloud, Cybersecurity, etc.


Seek cost reduction and solutions for service challenges with telecommunications (internet, phone, satellite, security, etc.)? (Global)

- Solution: Telecommunications Optimization & Cost Reduction Service
- Unlock Improved Services and Save 30% to 80% on Your Phone, Internet Solutions, Equipment, Software, Satellite, Cyber Security, other technology systems and more.
-  <https://ConsultingAce.com/Telecom> ← ← ← Click to Learn More

Utility Optimization and Cost Reduction


Seek utility efficiency and cost reduction (natural gas, electric, solar, wind, storage, etc.)?

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- Solution: Utility Optimization and Cost Reduction
 - Reduce cost, lock in rates, and gain efficiency!
 -  <https://ConsultingAce.com/Utility> ← ← ← Click to Learn More


Accounts Payable to Revenue Stream

Pay \$10M+ in yearly bills? (USA) or a Club (athletic, country, golf, yacht, polo, etc.) with \$1.5M+ in accounts payable annually?

- Solution: Commercial Accounts Payable Optimization & Automation
- Turn your AP Dept into a PROFIT CENTER with the “QuickBooks” of AP Automation!
-  <https://ConsultingAce.com/AP> ← ← ← Click to Learn More

Payroll Paycard


Have 250+ Employees and want to gain efficiency, save money, boost employee morale, reduce turnover, and attract new talent? (USA, 50 States, Puerto Rico, & US Territories)

- Solution: Employee Payroll Optimization & Automation
- All services are free for employees and employers. Employees receive a no-cost FDIC-insured Online Banking system with bill pay, money transfers, ATM, direct deposit, no credit check, and a Visa Paycard with 50% of wages before payday. Merchant service fees for credit card use cover all costs.
-  <https://ConsultingAce.com/Payroll> ← ← ← Click to Learn More

Shipping Integration and Optimization


Ship more than 200 packages a day or spend 2M+ yearly? (US, Canada, and Mexico)

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- Solution: Shipping, Logistics & Warehousing Software Integration & Optimization
- Combine shipping, warehousing, logistics, and analytics. Become Amazon-esque, always finding the fast route for the lowest price. Gain Efficiency, Save 10% to 30% and Boost Revenue.
-  <https://ConsultingAce.com/Ship> ← ← ← Click to Learn More


Medical Underpayments

Get paid \$50M+ from insurance companies as a medical organization?
(USA 50 States)

- Solution: Medical Insurance Underpayment Recovery
- Our average recovery is 22% of annual gross insurance billing. \$100M = \$22M more!
-  <https://ConsultingAce.com/Insurance> ← ← ← Click to Learn More

Uniform & Linen

Rent & launder uniforms and linen, spending \$100,000+ annually? (USA & Canada)


- Solution: Uniform & Linen Rental & Laundry Cost Reduction & Recovery Service
- Our average reduction is between 30% to 50% + Better Service.
-  <https://ConsultingAce.com/Rental> ← ← ← Click to Learn More

Employment Screening

Screen and test employees (background, DMV, drugs, alcohol, etc.)? (USA)


- Solution: One-Stop-Shop for Employee Screening, Drug & Alcohol Testing

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- Free setup and pay on performance for onsite and offset services with a money-back guarantee on products.
-  <https://ConsultingAce.com/Screen> | <https://DrugTestingAce.com>

Strategic Consulting & Other Services

Need help in other areas of the business? (Global - English Only)

- **Solution:** Comprehensive consulting services tailored to fit your specific needs.
- 25+ years of experience in identifying problems, creating strategies, and finding solutions.
 - Notables: Insurance (personal and commercial) & PrePaid Legal.
 - What is the problem, challenge, and/or need?
- **Other Top Programs:**
 - **Insurance:** Personal & Commercial. Compare All Plans. 1-Stop-Shop.
 - **Pre-pay Legal:** USA. Legal help, contracts, advice, and more. Low monthly flat fee.
-  <https://ConsultingAce.com/Consulting>

Primary Service Suite – The Details

We Help Organizations Of All Kinds

Gain Efficiency, Reduce Costs, Recover & Generate Revenue

👉 Solutions Are 🚫 Zero-Risk 💰 Zero Cost 📊 Performance Based

Understanding Service Groups

Our primary service suite comprises core fintech and SaaS solutions that optimize core systems and are performance-based. Primary services can be stacked to create an even more significant benefit—for instance, a hospital that ships its pharmacy can benefit from all Primary Services.

Consulting is treated uniquely and serves as a secondary service for specific clients. Some offerings, such as pre-paid legal and insurance, are also included as secondary offerings as they are not performance-based but carry a fee.

All the key points and information about each service are below. To dive deeper into each service, click the Link to ConsultingAce at the top of each section. These links will lead you to dedicated web pages packed with all the crucial details a potential client needs to get excited about scheduling a meeting. We've designed these pages to spark curiosity and inspire prospects to take the next step and arrange a meeting. Please don't hesitate to share if you have any suggestions for how we can make these resources even better.

Each service starts with a general question that will qualify and gauge the prospect's interest. The sections under each service include, but are not limited to, the Link to the ConsultingAce **Service Webpage**, the **Qualifications** the prospect must pass, the **Key Points** about the service, **Interest Questions**, **Lead Submission Questions**, and the **onboarding Process**.

Government Tax Credit & Incentives

Does Your Prospect Own property or have employees?

👉 Solution: USA Government Business Tax Credits & Incentives Recovery

Links to ConsultingAce

- Learn: <https://ConsultingAce.com/Tax>
- Access Calculator & Sign Up: <https://ConsultingAce.com/Calc>

Qualification

- USA Only.
- Must have 1 or more employees (not contractors) and/or organization-owned property (not personally owned like your home).

Key Points

- Gain easy access to ERC, R&D, WOTC, Cost Seg + 100s more from Federal, State, and local governments in our “QuickBooks” like solution.
- They are getting a Tax Management System, not just a one-time credit. This is a SaS platform like Quickbooks that will create an ongoing revenue stream.
- They have access to employee management tools that highlight which new hires will yield the highest returns from government incentives.
- There is a team to help them once they are registered.
- If they say, our CPA is doing this. CPA might do a couple. We give access to 100s.
- We don't replace your CPA; we provide forms they need to file.
- Fee vs. No Fee? It seems like a scam if there is no fee for a tax and legal system where you upload sensitive information. The Paywall separates serious organizations from lookyloos that will never use the system.
- The \$5 to \$9 Paywall SaaS fee + contingency commission is inconsequential compared to gains.

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- The fee is based on the number of employees they list in the hiring box. For the lowest onboarding fee, only add one for the new hires. Then, during setup, share the actual number.
- Set up a predictable recurring revenue stream today!
- We have been doing this since 2004 – over 38 Billion recovered!
- We can go back 5 to 20 years on some credits and incentives.
- It is better to get them into the system and signed up, then do a discovery call with the team on the back end, as then they will have something to discuss.

Interest Questions

Did you take the COVID-related ERC Program, where you received money from the government?

- **Yes:** did you know there are 100s of other programs, and they are given for both employees and property?
- **No:** [Find out why, not qualified, did not bother, no employees, etc.] Well, if that one did not work, did you know there are 100s of other programs that are given for both employees and property? [if they did not claim the Covid program or others, we can often go back 5 years and get them]

We give you access to a free calculator to see if you qualify for a few of the larger programs. If you like what you see, you can register. A team will help you get set up and pursue all the programs you want to claim.

Lead Submission Questions

- How many employees do they have?
- How many are hired every year?
- Do they own property? If yes, describe.

Process

1. Walk them through the calculator and sign them up as you meet them. The team will then set up a meeting to go over everything. This is the best option because the team will have access to data and be able to direct their next steps.

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2. Or, Have them meet with Andrew, discuss it, and sign up using the calculator.
3. Or, if they meet with Andrew and see the calculator but still need more, we can set up a discovery call with the team's experts.

Business Loans

Does Your Prospect need a business loan (SBA or other), financing, commercial real estate loan, VC Funding, or a line of credit?

👉 Solution: Business Loans, Financing, and Lines of Credit

Link to ConsultingAce: <https://ConsultingAce.com/Loan>

Qualification

- USA Only.
- The business must have operated for at least one year, producing revenue and sometimes a profit.
- Revenue minimums are often 100k to 350k. Usually, profit does not matter.
- Note that each loan type and vendor may carry different requirements, which the loan advisors will outline during the process. We have access to many brokerages and vendors. The method may involve multiple loan advisors if the prospect has credit rating and payment history issues.

Key Points

- Brokerage 240+ Loan Options – One-Stop Solution
- Options for no personal guarantee and more!
- This service covers all kinds of loans, including SBA and commercial real estate. Whatever your prospect's organization needs, say Yes – and then let the loan advisors figure it out.
- We don't offer bank direct loans. We can't help with loans from their local BofA, CitiBank, Wells Fargo, Chase, etc., or credit unions. At this time we are linked to private lending sources.

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- Private lenders can often move faster than banks and have less stringent requirements.

Interest Questions

- Do you need a loan, financing, line of credit, debt restructuring, credit rating improvement, or VC funding?
 - If No, let them know that we have them covered if they do.

Lead Submission Questions

1. How long in business? Or, if funding, what stage?
2. How much do they need?
3. What is it for?
4. Yearly revenue? Or, if funding, do you have financials ready to go?

Process

Once you have the answers to the questions above, we can either have them fill out a form or meet with a loan advisor to get them started. You can ask your prospect which they prefer.

Workflow Automation

Does Your Prospect: Have challenges with information transfers between different software platforms, repetitive manual tasks, working from spreadsheets, and other time-consuming data processing tasks and reporting? (Global) Service is for all-size organizations.

👉 Solution: Enterprise-level Process Workflow Automation

Link to ConsultingAce: <https://ConsultingAce.com/PA>

Qualification

- Worldwide English only.
- No other qualifications.

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Key Points

- Remove manual workflows
- Eliminate errors
- Save time
- Gain efficiency and productivity
- Enable growth and scalability
- No Upfront Costs
- No Need for Internal IT

Interest Questions

1. Are there aspects of your business that you are currently running out of Excel, Email, and/or Calendar Reminders?

Examples:

- Operational staff are trying to manage their daily work using sticky notes, Excel, and shared calendars.
- The accounting department manages commission payments and/or AR/AP using Excel instead of accounting software (QuickBooks, etc.).

2. Do you manually enter the same data into multiple systems?
(QuickBooks, Payroll, CRM, Project Management Systems, etc.)

Example: Onboarding new clients where a record is created in an accounting system, payroll, HR, and/or shared storage system, etc., but then that data needs to be copied into another system.

3. How do you currently assign and/or track the status of operational tasks?

Example: Team lead creates a shared spreadsheet with tasks to be completed and assigns team members to each item. The assigned team members then manually update the sheet with the status ("Not Started," "In Progress," etc.).

4. Are there bottlenecks in your operations that keep you up at night?

Example: Creating/sending invoices that require manual steps, following up on outstanding AR, and creating/sending sales proposals in a timely manner.

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5. Are there areas of your business that you know you could automate but haven't had the time or resources to do so?

Lead Submission Question/Answer

Information Needed: Briefly describe the process(es) to be automated. We don't need details; the team will get them during the process. We are seeking a short general description, for example: "They copy and paste from a CRM (HubSpot) to accounting software (Quickbooks Online) and want to automate that process."

Process

Start by collecting the answers to the questions. Submit your lead using the official form so we can track it and credit you. Then, coordinate an introductory meeting with Andrew's team or a discovery meeting with the Service Team. Direct Service Team introductions are only made if the prospect is qualified and interested in the service. See the entire process for this service on the website under the section entitled The Process & Time.

Merchant Services Cost Reduction

Does Your Prospect: Seek cost reduction and solutions for service challenges with merchant services credit card processing?

👉 Solution: Merchant Services/Credit Card Processing Optimization & Cost Reduction

Link to ConsultingAce: <https://ConsultingAce.com/Credit>

NOTE: There Are 2 Services Covered Within This Section

1. **Current Vendor:** Cost reductions with their current vendor
2. **Comparison:** Compare current vendors to other vendors for cost reduction, service, and equipment improvements.

Qualification

1. **Cost Reduction with Current Vendor – USA Only**
 - a. Must be receiving 125k or more a year in merchant service payments.
 - b. If Stripe, PayPal, Square etc 2M+ in annual payments.

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2. **Compare to New Vendor:** Worldwide. There is no qualification if they are open to switching to a new vendor.

Key Points

- Our average reduction of 28% on your credit card processing costs.
- The analysis and cost comparison is free – we need three (3) statements.
- **Coverage:** USA, Canada (cost reduction), Global (move to new vendor),
- **Founding:** Cost reduction with current vendor - in business since 2012. Preferred vendor for complete merchant services in business since - 2003.
- We offer cost reduction and better price, service, and equipment options. They can keep their current system and vendor or upgrade to a superior choice.
- Cost reduction services can also help recover money from errors.
- Effortless Setup: Savings start in a few weeks or as soon as the switch.

Switch to New Vendor – Primary Partner Key Points

1. Save on Rates

- Each card (Visa, MasterCard, AMEX, etc.) has its own fee.
- We secure the best rate per card.
- Adds a minimal processing fee of about 0.3 to 0.5%, known as Card Plus Value.
- Results in lower costs compared to flat rates and competitors.

2. Fix Problems

- Pricing isn't always the issue; other problems may exist.
- Issues like processing limits, funding delays, holds, and chargebacks.
- Partner addresses other problems:
 - Eliminates funding delays.
 - Reduces chargebacks.
 - Resolves other processing issues.
- Service-focused approach: inquire about existing processing challenges.

3. Dedicated Rep and Immediate Support

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- Assigned dedicated representative.
- Access to alternative contacts for immediate assistance if they are not available.
- Optimization and efficiency Assistance: Guidance on choosing the best processing solutions.

4. Seamless Integration

- They have all the equipment you need
- Integrate into any website and software.
 - API - can be easily adapted to work with any software or website.
 - Magento
 - WooCommerce
 - Just to name a few

5. Options to Receive Payments

- Virtual Terminal
- A dedicated hosted payment page that can be linked to from anywhere
- Can Send Payment Links. There are many options. You can even get notified if they open and pay the invoice.
- Invoicing, subscriptions, and more are available.

Interest Questions

- How much do you spend on merchant services?
- Are you having problems with chargebacks, delays in funding, equipment, bad customer service, etc?
- Would you like to save on the fees and get better services and equipment?

Lead Submission Questions

Merchant Services Cost Reduction Service

1. Three (3) monthly statements. If the organization experiences seasonal variations, please try to include at least one statement from that period.
Typically, processing statements are PDFs that look similar to bank statements,

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not Excel spreadsheets. Stripe may require both kinds (PDF and Excel) if they want a cost reduction with the current vendor and a comparison to other vendors. We can provide guidance with Stripe.

2. Average Transaction Size
3. Approximate Yearly Credit Card Volume
4. What product or service are they receiving payments for?

Process

1. First, choose a starting point.
 - **Option 1 - No Analysis:** If the prospect is starting an organization and does not need a comparison, you can set up a meeting with Andrew, OR we can send them an email with instructions on how to get started with our preferred vendor. The email will introduce the vendor, and the prospect can interface with them directly.
 - **Option 2- Analysis:** If they want to receive a free cost reduction analysis, email andrewc@consultingace.com three (3) of the prospect's most recent merchant processing statements. If the business experiences seasonal variations, please include at least one statement from that period. If they need help locating the statements, let us know the vendor, and we may be able to guide where to get them. Typically, processing statements are PDFs that look similar to bank statements, not Excel spreadsheets. Stripe may require both kinds (PDF and Excel) if they want a cost reduction with the current vendor and a comparison to other vendors. We can provide guidance with Stripe.
 - **Option 3 - Introduction:** You can also set up a meeting using Andrews's calendar link to discuss the program first. If interested, we will ask for 3 statements to do the analysis.
2. Next, once the analysis is complete, we will set another meeting with the prospect to share the results. Be sure to thank your prospect for sending the statements and inform them that we will get back to them to schedule a meeting once the analysis is complete.

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3. We will then guide them to the following steps if they want to move forward with one of the options.

Credit Cards – Class Action Lawsuit

Did Your Prospect accept credit card payments between 2004 and 2019?

👉 Solution: Class Action Lawsuit Assistance.

Link to ConsultingAce: <https://ConsultingAce.com/Credit>

Link to Sign Up Form: https://www.frscsco.com/FRSAP/?tfa_135=11096

Qualification

- USA Organizations Only.
- Must have been receiving credit card payments between 2004 and 2019.
- Must be filled by August 30, 2024.
 - Do not wait until the last day to sign up with our solution as it takes a couple of days to process and more time to submit the claim.
- To get a meeting before signing up, they must have processed over 10 Million+ between 2004 and 2019.

Key Points

- **Coverage:** USA Only
- **Founded:** 2008
- **Effortless Setup:** Simply fill out a form to get started.
- We can help even if they registered using the mailer.
- We can help if they don't have any records or remember the vendor.
 - Our partner has access to all the data and can find it all by company name and location.

NOTE: Below, we have created additional resources. These include emails and instructions on how to use a form/email combination. [Click Here To Go There.](#)

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Sample Script:

Hi _____, have you enrolled to get your recovery from the Visa/Mastercard settlement yet?

What is it?

It is a class action settlement for acceptance of Visa and Mastercard at any time between January 1, 2004, and January 25, 2019.

We can help you get your maximum rightful recovery from the \$5.54 billion settlement fund with no time spent by you or your team. We take care of the entire process from start to finish and work only on a contingency fee for the recovery when the recovery occurs. However, we only have until August 30 to get your claim in.

ASK1: Can we schedule a call to discuss the process and enroll you?

ASK2: Sounds good? Great, I will send you a link so you can enroll with me and the company that will handle the filing. The link will take you to their site to learn more about them and the lawsuit.

Interest Questions

- Have you accepted credit card payments between January 1, 2004, and January 25, 2019?
- Did you have more than one processor during that time?
- Did you have multiple businesses or locations that accepted credit cards?
- Did you get a mailer, did the amount seem correct, and did you sign up?
- Would you like some help to ensure you get all you are due?

Lead Submission Questions

- Submit your lead and then have them fill out this form:
https://www.frsco.com/FRSAP/?tfa_135=11096 ← Ensure they use the entire link so the account is credited to us.
- To get a meeting with the firm before signing up, they must have accepted about \$10 Million or more in credit card payments between January 1, 2004, and January 25, 2019. This bar is set low, but try to have a meeting only if needed. The easiest is

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getting them to fill out the form, and then the firm will contact them to set meetings as required.

- How much credit card volume did they estimate the process between 2004 and 2019?
- If they don't know, ask what they feel they did on average or high and low during that time.

Process

- **Option 1:** Submit your lead by emailing it to Andrew with the subject line "Credit Card Lawsuit Lead (Biz Name)" or by using the official lead submission form so we can track it and credit you. Then, have your prospect fill out the FRS form using the link above. You can also do this using the form as described below.
- **Option 2:** Start by collecting the answers to the questions. Then, coordinate an introductory meeting with Andrew's team or a discovery meeting with the Service Team. Direct Service Team introductions are only made if the prospect is qualified and interested in the service.

Telecommunications

Does Your Prospect:

Seek cost reduction and solutions for service challenges with telecommunications (internet, phone, cloud, satellite, cyber security, software, other tech, etc.)?

👉 Solution: Telecommunications Optimization & Cost Reduction Service

Link to ConsultingAce: <https://ConsultingAce.com/Telecom>

Qualification

- Service coverage is worldwide.
- Larger than a single phone line and internet connection.

Key Points

- Unlock Improved Services and Save 30% to 80%

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- This service covers phones (cell, office, landline, PBX, virtual, and more), internet, satilight, cloud services, all kinds of equipment and software, cyber security, and more. If they need tech or software, submit an inquiry and see if we can help.
- In operation since 2009.
- We are a broker and can compare all vendors and plans to find the best solutions.
- Comparing all vendors in one place for free should be a no-brainer.
- Can combine different vendors into one solution.
- Great help to organizations in multiple states and countries - Truly international and multilanguage.
- Streamlining many locations and solutions can comprise many different service providers.
- Note that this is not a one-time service. We can help with the organization's entire telecom needs throughout its life.

Interest Questions

- Are you having issues with or do you need to upgrade or downgrade your internet, phone, cloud, satellite, data storage, security, or any other telecommunication service?
- How much do they spend? If they feel it's too much, and if they have issues with equipment (outdated, upgrades, problems with performance, etc.)
- Would you like to save money and have equal or better services and equipment?

Lead Submission Questions

- Generally, describe their problems and needs/desires (e.g., saving money, upgrading, downgrading, expanding, etc.).
- If you want to compare, get at least 1 statement for each service, i.e., phone, internet, cloud, cyber security, etc.

Process

Start by collecting the answers to the questions. Submit your lead using the official form so we can track it and credit you. Then, coordinate an introductory meeting with Andrew's

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team or a discovery meeting with the Service Team. Direct Service Team introductions are only made if the prospect is qualified and interested in the service.

Utility Optimization & Cost Reduction

Does Your Prospect seek cost reduction & efficiency with utilities (gas, electric, solar, etc.)?

👉 **Solution:** Utility Optimization and Cost Reduction Service

Link to ConsultingAce: <https://ConsultingAce.com/Utility>

Qualification

- USA Only
- Needs natural gas, electricity, solar energy, or to store energy.
- There are added benefits if they have mass lighting and HVAC needs, perform crypto-mining, or have data centers or other energy-intensive work.

Key Points

- **Experts in Energy:** Since 2011, we have specialized in lowering costs and optimizing electricity, natural gas, solar, wind, energy storage, equipment, and lighting.
- **Insider Knowledge:** Harness decades of industry experience, insider knowledge, and strategic contacts to secure the best energy deals and deliver cost-effective solutions for your business.
- **Free Analysis:** Send us your statement for review, and we will analyze your needs, develop a plan, and share energy projections with you.
- **Lock In Savings:** We can often lock in your lower rates for 5 to 20 years, ensuring long-term cost stability.
- **Cost Savings with Zero Cost:** Save money with our services at no cost. We are compensated by utilities, enabling you to pay less on energy bills without extra expenses.

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- **Market Insights:** Gain valuable insights into all energy and storage markets to make informed decisions.
- **Tailored Energy Plans:** Receive comprehensive energy pricing strategies customized to your specific needs.
- **Savings Start Fast:** Experience immediate savings upon activation of our tailored energy plans.
- **Extensive Reach:** Benefit from our large client base, serving over 400,000 customers and managing over 500,000 electricity and natural gas meters.
- **Trusted Partner:** Rely on us as your trusted energy broker to negotiate the best deal and match you with the right energy plans, whether you keep your existing vendor or upgrade to a superior option.

Interest Questions

- Would you like to save money on gas, electricity, and other utility bills?
- Would you like to lock in savings for 3, 5, or up to 20 years?
- Would you like to know other strategies and be given free equipment to help you reduce costs and be more efficient?

Lead Submission Questions

- **Approximant Utility Spend:** Break it up per utility, such as gas, electric, etc. Alternatively, if they want a comparable cost reduction, we need at least one statement from each utility. We can move directly to a discovery meeting if they are starting and have no past utility bills.
- **Be sure to get the exact address of each location where the utilities are needed.**

Process

Start by collecting the answers to the questions. Submit your lead using the official form so we can track it and credit you. Then, coordinate an introductory meeting with Andrew's

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team or a discovery meeting with the Service Team. Direct Service Team introductions are only made if the prospect is qualified and interested in the service.

Commercial Accounts Payable

Does Your Prospect Pay \$10M+ in yearly bills Or are they a Club (athletic, country, golf, yacht, polo, etc.) with \$1.5M+ in AP spend annually? Do they want to turn their accounts payable department into a revenue stream?

👉 Solution: Commercial Accounts Payable Optimization & Automation

Link to ConsultingAce: <https://ConsultingAce.com/AP>

Qualification

- USA Only
- Pays \$10M+ in yearly bills for all organization types except clubs.
- Or Pay \$1.5M+ in yearly bills as a Club (athletic, country, golf, yacht, polo, etc.).

Key Points

- Turn your Accounts Payable Department into a PROFIT CENTER with the “QuickBooks” of AP Automation!
- Streamline and automate with cutting-edge software, industry experts, and AI.
- Receive the highest cashback and a dedicated team who will continuously work to onboard your vendors.
- Save Time: Fewer manual tasks, quicker invoice approvals, and free up staff for higher-value activities.
- Eliminate fraud.
- Eliminate paper.
- Gain real-time reporting/analysis and bank reconciliation.
- 100% of our clients generate revenue.
- There is NO Cost to this service.
- Our solution PAYS YOU to make your business more efficient, secure, and effective.

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- With a team of experts since 2010 and thousands of happy customers and references, you can't go wrong!

Interest Questions

- Do you pay more than 10 million in bills within a year?
 - Yes: Wouldn't you like to make money from doing that? How about a return that is considerably more than the whole department's cost?
 - No: Sorry, this program won't work for you. with this program.

Lead Submission Questions

- Approximant Annual Revenue
- Approximant Yearly Accounts Payable Spend
- What enterprise resource planning (ERP) software do they use?

Process

Start by collecting the answers to the questions. Submit your lead using the official form so we can track it and credit you. Then, coordinate an introductory meeting with Andrew's team or a discovery meeting with the Service Team. Direct Service Team introductions are only made if the prospect is qualified and interested in the service.

Employee Payroll Perks Optimization

Does your prospect have 250+ employees who want to improve satisfaction and retention and attract new talent?

👉 Solution: Employee Payroll Optimization & Automation

Links to ConsultingAce: <https://ConsultingAce.com/Payroll>

Qualification

- USA, 50 States, Puerto Rico, & US Territories Only.
- 250 Employees or more.

Key Points

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- All services are FREE for employees and employers.
- Employees receive a no-cost FDIC-insured Online Banking system with bill pay, money transfers, ATM, direct deposit, no credit check, and a Visa Paycard with 50% of wages before payday (covered by us, not your prospects organization).
- Merchant service fees for credit card use cover all costs.
- Available for employees 16+ years old. Employers gain efficiency, save money, boost employee morale, reduce turnover, and attract new talent.
- This solution is not a replacement payroll system.
 - The solution seamlessly integrates into any payroll system.
- The team has over 20 years of experience in the financial industry.
- The business was founded in 2019.
- Large organizations use: Walmart, the State of Georgia, school systems, hospitals...

Interest Questions

- Do you have more than 250 employees?
- Would you like to increase employee satisfaction retention and attract new talent?
- Would you like to give a perk to your employees?
- Would you like to help them with their finances? Would you like to save your employees from being taken advantage of by Payday loan companies?

Lead Submission Questions

- How many employees do they have (250+ minimum)?
- Name of Payroll service or software?
- Payroll Frequency?

Process

Start by collecting the answers to the questions. Submit your lead using the official form so we can track it and credit you. Then, coordinate an introductory meeting with Andrew's team or a discovery meeting with the Service Team. Direct Service Team introductions are only made if the prospect is qualified and interested in the service.

Shipping Solution

Does Your Prospect Ship more than 200 packages a day or spend 2M+ yearly?

👉 Solution: Shipping, Logistics & Warehousing Software Integration & Optimization

Link to ConsultingAce: <https://ConsultingAce.com/Ship>

Qualification

- Headquartered in North America (US, Canada, and Mexico) can ship globally.
- Ship more than 200 packages a day or spend 2M+ yearly.

Key Points

- Combine shipping, warehousing, logistics, and analytics with the “QuickBooks” of shipping integration and optimization.
- Become Amazon-esque, always finding the fast route for the lowest price.
- We combine all the best shippers into one seamless solution.
- Cutting-edge software, AI, and industry experts. Can integrate with or replace their current system; covers outgoing and incoming.
- Proven track record and glowing references since 2009.
- Gain Efficiency, Save 10% to 30% & Boost Revenue.

Interest Questions

- Do you ship more than 200 packages a day? If Yes, how many?
- Do you spend about two million or more a year on shipping annually?
 - If Yes, how much?
- Who is the primary shipping company(s) they use currently?
- Would you like to become Amazon-esque shipping for the lowest price but the fastest route using all the best shippers in the country?
- Would you like to gain efficiency with your shipping?

Lead Submission Questions

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- What Shipping and enterprise resource planning (ERP) software do they use?
- What carrier(s) do they primarily use?
- Estimated Annual Shipping Spend:
- How many packages are shipped per day on average?
- What do they ship? (Check all that apply.)
 - Parcel, LTL (less than truck load), FTL (Full Truck Load), International Parcel, Freight, and Other.
 - Require Cold Ship or Seasonal Considerations (Example: flowers shipping to Arizona in summer or Wisconsin in winter)

Process

Start by collecting the answers to the questions. Submit your lead using the official form so we can track it and credit you. Then, coordinate an introductory meeting with Andrew's team or a discovery meeting with the Service Team. Direct Service Team introductions are only made if the prospect is qualified and interested in the service.

Medical Insurance Underpayment

Does Your Prospect Get paid \$50M+ from insurance companies in a year?

👉 Solution: Medical Insurance Underpayment Recovery

Link to ConsultingAce: <https://ConsultingAce.com/Insurance>

Qualification

- USA 50 States Only
- \$50 Million or more in annual gross insurance receipts.
- We are working on an under 50m solution.

Key Points

- The average recovery is 22% of annual gross insurance receipts.
\$100M = \$22M more!

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- They receive a free high-level third-party audit proving they left nothing on the table or money. Either way, they win.
- Lowest recovery 10%, largest recovery over 30% = over \$300 Million.
- We only start after their team and vendors are done; this includes other so-called recovery companies.
- All systems and processes are HIPAA-certified and secure.
- In operation since 2008.
- Once the contract is signed, all that is required on their side is to upload contracts and statements. Many have completed this process in under 2 hours.
- After receiving the documentation, it takes, on average, three months to recover the funds. It can take longer if we go back many years or if very complex.
- All money recovered is paid directly to the client.
- We customize cutting-edge software per project and utilize AI and industry experts to ensure nothing is left behind.

Interest Questions

- Do you receive 50 million or more in annual gross insurance receipts?
 - No: If under 50 million, tell them we are working on a solution for them.
- Would you like a complimentary, high-level third-party audit to recover money from insurance companies' underpayments or to ensure you receive all you are due, all at no cost?
- Do you have other revenue cycle problems or needs? Would you like some help?

Lead Submission Questions

1. What type of medical facility is it? Is it a hospital, surgical center, ER, medical procedure practice, or a mix of the above?
2. What are the approximate gross receipts with the top insurers?

Process

Start by collecting the answers to the questions. Submit your lead using the official form so we can track it and credit you. Then, coordinate an introductory meeting with Andrew's

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team or a discovery meeting with the Service Team. Direct Service Team introductions are only made if the prospect is qualified and interested in the service.

Uniforms & Linen

Does Your Prospect Rent and launder uniforms and linen and spend 100k+ yearly?

👉 Solution: Uniform & Linen Rental & Laundry Cost Reduction Service

Link to ConsultingAce: <https://ConsultingAce.com/Rental>

Qualification

- USA & Canada Only
- Must spend 100k+ yearly on uniforms & linen rentals, and laundry services.
- Do they rent and/or launder Uniforms, Linen, or Both?
- Are their uniform and linen rentals over \$100k a year? (If no, what is the level?)

Key Points

- Our average reduction is between 30% to 50% + Better Service.
- Keep current vendor; let us get you the best deal!
- We ensure compliance at all locations.
- Recover money from errors.
- Possibly get a better deal regarding how often items are laundered or replaced if tattered.
- Our team has over 17 years of experience (Since 2007) and insider knowledge of the industry, enabling us to negotiate the best deals with Aramark, Cintas, UniFirst, AlSCO, and others.

Interest Questions

- Do you spend more than \$100,000 on renting or laundering uniforms and linen?
- Would you like to save money on this service at no cost?

Lead Submission Questions

- How much do they spend a year on rentals and laundry services?

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- What do they rent and launder?
- Who is the current vendor?

Process

Start by collecting the answers to the questions. Submit your lead using the official form so we can track it and credit you. Then, coordinate an introductory meeting with Andrew's team or a discovery meeting with the Service Team. Direct Service Team introductions are only made if the prospect is qualified and interested in the service.

Employment Screening

Does Your Prospect Screen and test employees (background, DMV, drugs, alcohol, and more!)?

👉 Solution: Employee Screening, Drug & Alcohol Testing Products & Services

Links to ConsultingAce

- Learn More: <https://ConsultingAce.com/Screen>
- Drug Testing Website: <https://DrugTestingAce.com>

Qualification

- USA Only
- No other qualifications

Key Points

- One-Stop-Shop for instant test kits, comprehensive services, great rates, and policies.
- We cover DMV, Background, Security Clearance, and other checks, physicals, and other competency testing. We also cover all types of drug, alcohol, nicotine, and wellness testing.
- Services Can Include: Mobile & Onsite Testing (We Come To You); Offsite Testing (Go to a Local Testing Center); Instant Drug and/or Alcohol Testing Services (DIY & Mail 4 Confirmation); Drug Testing Confirmation with SAMHSA Certified Labs;

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Certified MRO Services; DOT (Department of Transportation) Drug & Alcohol Screening; Background Checks; Social Security Validation; Motor Vehicle Report (Driving Record); Patriot Act Search (Terrorism Watch List); Sex Offender Search; and People Search.

- Even if they do this now, we can save them money with their current providers because of our volume.
- The benefit is that they get one place for all screening and testing.
- This service has no minimum usage requirement. Instant test customers can place orders directly on the website. The onsite and offsite screening will go through an online portal, but our team must set them up before they can access it.
- An industry leader since 2009.
- Free setup and pay on performance for onsite and offset services with a money-back guarantee on products sold off the website.

Interest Questions

- Do you conduct drug and alcohol testing for employees?
- Do you want to test employees onsite or send them to a location?
- Do you perform DMV checks, background checks, physicals, and other employment screenings?
- Are you interested in saving money while receiving excellent services?
- Are you considering changing vendors or negotiating lower costs with your current vendor?

Lead Submission Questions

- What screening services do you need? Please list them all.
- Do they want drug and alcohol testing?
 - If Yes
 - Do they want instant testing kits
 - Or should we send them to a lab or another location to be tested?

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- Approximately how many people do they screen/test every month?

Process

Start by collecting the answers to the questions. Submit your lead using the official form so we can track it and credit you. Then, coordinate an introductory meeting with Andrew's team or a discovery meeting with the Service Team. Direct Service Team introductions are only made if the prospect is qualified and interested in the service.

Strategic Consulting Services

Does Your Prospect Need help optimizing aspects of business and life?

👉 Solution: Strategic Consulting Services

- Don't wait; skip steps and become truly successful now!

Links to ConsultingAce: <https://ConsultingAce.com/Strategy>

Qualification

- Worldwide / English Only
- No other qualifications

Key Points

- Other Top Services
 - Insurance: Personal/Commercial. All Plans – All Providers – One Stop Shop.
 - Legal: Pre-pay low-fee access to lawyers, contract reviews, discounts, and more.
 - These will be broken out as full options soon.
- Remember, we are the Ace who knows the Jacks in all the Trades you need to know, which means we have many other services and connections to help you prospect. Another way to explain this is that we are like a master contractor, finding and overseeing the best cement layers, framers, plumbers, electricians, and other specialists to build your perfect house. The benefit is that you have one point of contact who has vetted everyone and identified the best, ensuring you are efficiently guided through all the different services.

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- Simply ask, what other pain points do you have?
- Other services include Legal, Insurance, Tax, Leadership Development, Employee Satisfaction, and more.
- This service is exclusively tailored to each client, with Andrew personally overseeing every aspect.
- The complete consulting package focuses on optimizing business and personal life.
- Since 1999, Andrew's clientele has included young achievers aiming to fast-track success, seasoned C-level executives, and celebrities pursuing work-life balance and solutions for unaddressed issues.
- Engagement durations can vary from a few hours to long-term arrangements.
- Highly qualified individuals are invited to a complimentary introductory meeting.
- Legal and Insurance can be handled like other programs. If you find someone who wants more, submit the lead and speak to Andrew before contacting your contact to ensure availability and interest.

Interest Questions

- What other problems do you have?
- Insurance: Would you like to do an insurance audit to see if we can get you better coverage for less money?
- Legal: Would you like to pay a low monthly fee and have access to lawyers throughout the US who can review documents/contracts, answer your questions, and even help you in court?
- Do you have any bottlenecks that you would like to resolve?
- Do you need culture or leadership development?

Lead Submission Questions

- Include what they seek, including pain points and, if desired, the outcomes they seek if known.

Process

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Start by collecting the answers to the questions. Submit your lead using the official form so we can track it and credit you. Then, coordinate an introductory meeting with Andrew's team or Andrew directly.

Information Section

Your Goal

Your ultimate goal is to spark interest in our zero-cost, performance-based services, making you a vital bridge between organizations and substantial financial benefits. Your efforts center around guiding your prospect through a funnel normally consisting of a form and/or meetings. Ultimately, the goal is to get them to the team of experts who can answer all questions and guide them through the rest of the process.

You are not to be the subject matter expert or to play middleman. The quicker you can get them through the funnel, set meetings, and get your prospect talking with the subject matter experts, the faster you will close deals. You want your prospect to meet and build rapport with our teams. Simply put, the job is to warm the prospect up, lead them through onboarding, and then hand them off to a team of experts who will take it from there.

When referencing your relationship with ConsultingAce, you can say things like, I have partnered with, started working with, I know a guy, and more. Others have said we started a new division and would like you to talk with our partner who handles it. You can't say you are an employee or employed by ConsultingAce.

Introduction: The “Movie or Book” Type

When presenting ConsultingAce and what we do, think about doing it in the same way you share a movie or book that you like with friends or family. You don't tell them all about the movie or book when you share. Instead, you are excited and say things like, “Wow, I saw this great movie; it has action and all these great actors; it is really great; I think you will really like it; you need to see it.

The same idea can be used when you share ConsultingAce. For example:

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“Hey, I have something really exciting to share with you. We’ve partnered with an incredible firm.”

Alt1: “How would you like to make, save, and recover time and money for nothing?”

or

Alt2: “They make, save, and recover time and money for organizations like yours. The best part is that they do it at no cost or on a performance basis. Literally, you will pay nothing.”

Then

“They have a lot of different services, which is great because they stack up to create a huge benefit. Two of them I think you might like to start with are the

1. Government Tax Incentives and Credits
2. Credit Card Class Action and the 2 Cost Reduction
3. Or pick something else you know they will like. If those two don’t work, talk about others or who they know that we can help.

I can’t explain everything, but you need to check it out. I can show you a video and even introduce you to the company’s CEO. I know they can really help you.”

Say this idea in your own way. The idea is to share your excitement and a little about what we do and maybe some key services that you know might be of interest. You seek to share enough to get them interested in speaking with us or going through a funnel. Using this method, you don’t have to be the subject matter expert; you don’t have to answer a lot of questions. You can get them in a meeting with Andrew and his team, and we work together from there. You are not alone. This method is excellent to use when starting.

Introduction: The Consultant

The consultant's introduction revolves around explaining the high-level core principles of our work. I am not giving you the words, but instead the ideas of what to say.

At the heart of every organization are two crucial elements: Time and Money. Time and money represent the resources that drive your business and personal life. Our mission is to optimize essential systems, saving you time and money to reinvest in other areas.

We've vetted and curated a suite of services designed to optimize these core systems in nearly every organization. The best part is we work on a zero-cost or performance basis. We put our money where our mouth is, investing in your organization before making anything, sometimes tens of thousands. You know the services are good because they are offered on a performance basis. We also have a streamlined process and do all the heavy lifting, saving you time.

You can do more by streamlining operations, reducing costs, generating revenue, and recovering funds from various core systems. The whole of what we do is greater than the sum of its parts. Our services stack up and combine to create an even greater benefit. You have nothing to lose but everything to gain. You can investigate each service, complete your due diligence, and make an informed decision. There is no risk in getting started. You are not committed to anything other than learning more.

Bullet Point List:

- **Maximize Efficiency:** Focus on saving and recovering resources like money and time.
- **Optimize Core Operations:** Identify and enhance key foundational aspects of business operations.
- **Reduce Costs:** Implement strategies to minimize expenditures and increase profitability.
- **Generate Revenue:** Develop methods to enhance income streams within existing systems.

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- **Recover Funds:** Identify and recoup lost or overlooked financial resources.
- **Streamlined Services:** Our suite of services is tailored to improve operations across diverse industries.
- **AI Integration:** Our solutions incorporate proven AI processes, allowing any organization to benefit immediately with no development time or cost. Many of our solutions have integrated AI for several years, with some using it for over nine years.
- **Synergistic Benefits:** Each service stacks up and complements the others to deliver significant benefits.

Elevator Pitch / Value Proposition

Alternate 1

At ConsultingAce, we specialize in optimizing your organization's efficiency and financial outcomes without upfront costs. Let's discuss how we can enhance your operations.

Alternate 2

We specialize in helping organizations optimize systems, boost efficiency, and make, save, and recover substantial amounts of time and money. The best part? There is Zero Risk. Our services are Zero-Cost and Performance-Based; we basically pay you to work with us! We have thousands of happy customers and references. Our contingency compensation is modest and fair. Getting started is quick and easy, often taking just minutes.

Alternate 3

At ConsultingAce, we specialize in optimizing your organization's time and money. Our services are designed to save you resources and improve efficiency, all at no upfront cost – we put our money where our mouth is. We focus on streamlining operations, reducing costs, and generating revenue within your existing systems, saving you valuable resources that can be reinvested elsewhere.

Alternate 4

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At ConsultingAce, we focus on two essential elements crucial to every organization: time and money. Our mission is to optimize these core functions, saving you valuable resources that can be reinvested elsewhere. We offer a suite of services designed to maximize efficiency and streamline operations. The best part? We work on a performance basis, often at no upfront cost to you, handling all the heavy lifting to save you time.

Our approach involves identifying key areas to optimize core operations, reduce costs, generate revenue, and recover overlooked funds. By leveraging our synergistic services, we empower organizations to achieve more with their resources. Let's explore how ConsultingAce can help maximize your efficiency and profitability.

Qualifications: The Basics

Each service has its qualifying; however, to get started, you can ask three simple questions to see if there is a basic fit.

1. Do you have employees? How many?
2. Do you own property through an organization (not privately owned)?
3. Do you sell services or products online or through stores?

The more employees, property, services, and products there are, the more likely we are to help them. Generally, we can't help solo entrepreneurs unless they sell a lot of products online. We also generally can't help startups if they don't have any employees or sales. Again, each service will have its qualifier, giving you an idea of its potential.

Foundational Marketing Concepts

1. ConsultingAce specializes in helping organizations optimize systems, boost efficiency, and make, save, and recover substantial amounts of time and money.
2. The best part? There is Zero Risk. Our services are Zero-Cost and Performance-Based. Another way to express this idea is by saying, "Our services are zero-risk because they are zero-cost and performance-based."

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3. We don't just cover the costs – we pay for ourselves and then some! Partnering with us means we're investing in your business's success and giving you a lucrative opportunity. In essence, we pay you to work with us, delivering unmatched value, and there is no need to talk ROI because everything is performance-based.
4. We help unlock the true potential of your business by optimizing its core systems.
5. We save, make, and recover time and money within your existing operations.
6. Over 25 years in business.
7. We have thousands of happy customers and references.
8. Our contingency compensation is modest and fair.
9. Getting started is quick and easy, often taking just minutes.
10. Our streamlined solutions stack-up to create a powerful impact, synergizing efficiency, saving valuable time, and boosting revenue.
11. Our documents and website are not meant to furnish exhaustive details but rather to offer a brief overview to set up introductions and discovery meetings.
12. Discover the power of having cutting-edge software, AI, and seasoned industry leaders on your side.

Additional Key Points

- **Role:** Your role is to introduce the service, set up meetings, and be a cheerleader. You are not in sales. We are not charging, so there is nothing to sell. In fact, we HELP them make, save, and recover money at no cost – the complete opposite of selling! Focus on sharing how we can help these organizations make more money for nothing with things they are already doing. If you are selling anything, it's the meetings.
- **Time & Money Benefits:** Our services empower clients to reclaim valuable time and financial resources, all at no cost, with things they are already doing. Every aspect of our assistance covers costs and generates income and time savings. This proposition is a straightforward win, addressing the fundamental needs of all organizations – more time and money.
- **Benefits & ROI:** Emphasize efficiency gains, cost savings, revenue generation, and recovery. The selling point on ROI is that there is no need to discuss it as there are no

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upfront costs to recover. We invest in them, helping them scale and grow profitability.

- **Risk-Free Services:** Zero-cost and performance-based.
- **Money Where Our Mouth Is:** We invest time and money upfront, setting everything up before any earnings. We put our money where our mouth is; essentially, we pay your prospect to work with us. Please don't take this lightly; our investment can be 10s to hundreds of thousands of dollars.
- **Track Record:** Thousands of satisfied customers and references. Each service has its own. It's better to have that team provide references, case studies, and other materials, as it will help them build rapport with your prospect. This is very important, for if you stand in the middle, they are not building confidence in the team that will do the work.
- **Premier Partners:** We represent some of the largest fintech firms in the world. We are a broker of brokers in critical industries.
- **Partner Disclosure:** Remember, our partner names aren't revealed initially. We only do so after they qualify and you have enough information to register the lead with Consulting Ace. This process protects you from the prospect going direct and cutting you out. You can tell your prospect that you make your living by bringing prospects, not by sharing the names and having them go directly. Use ConsultingAce as the company name you drop and talk about.
- **Your Expertise:** Guide and introduce services; act as a project manager, leading them to significant savings and earnings through various zero-cost, performance-based services.

The bottom line is that once your prospect experiences the transformative impact of cutting-edge technology, AI, and seasoned industry experts combined with risk-free opportunities, the decision becomes crystal clear, and there's no turning back. We are the Ace up your sleeve, your Ace in the hole, ensuring you and yours always win! (I hope that was not too corny, but with Ace in the name, it's a natural! 😊)

Objection Talking Points

1. How to Explain Everything: First, it is critical to take yourself out of being the subject matter expert by saying something like: I just started working with/for, I know a guy, I have partnered with, or, I consult for a consortium of companies, or, we have added a division to our company, or another statement that allows you to introduce them to someone else. Since we make, save, and recover money and time at no cost, you are trying to help them. It's like recommending a movie you saw and knew they would like. You are not selling anything as there is nothing to buy.
2. Objection: You might hear something like, "That's so many services; no one can be the jack of all trades. No way one firm can do all of that."

Answer/Joke: We're not the Jack of All Trades; we're the Ace who knows the Jacks in the Trades that you need to know! Whether we own some, invest in others, or simply introduce you to them because they're the best, we prove it with our contingency/performance pricing model. We put our money where our mouth is and invest time and money in your organization before seeing any return.

Another way to explain this is that we are like a master contractor, finding and overseeing the best cement layers, framers, plumbers, electricians, and other specialists to build your perfect house. The benefit is that you have one point of contact who has vetted everyone and identified the best, ensuring you are efficiently guided through all the different services.

Background: This model stems from my 25+ years of consulting experience. With countless issues in companies, it was clear I couldn't fix them all. Cost and discussions about ROI posed significant challenges. However, I could connect with top experts or exceptional services from those who excel in their fields. We've thoroughly vetted these companies to bring you the best of the best, ensuring quick benefits. Our primary programs operate on a performance-based model—no upfront costs or ROI talks. We serve as the nexus, finding optimal solutions that make, save, and recover our customers' time and money. Again, we're so confident in our abilities that we prove it by

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putting our money where our mouth is, often spending tens of thousands of dollars to set things up before making a dime.

To clarify, ConsultingAce either owns some of these companies outright, invests in others, or recommends them because they are the best. Additionally, we may suggest a solution where we don't receive any compensation other than the satisfaction of being able to assist.

3. What are the names of the people, services, and companies you represent?

Answer: Be careful on this one. You don't want to give away the names of companies we work for before you have sold them on the idea of what you do, collected contact information, and can bring them through the funnel. If you give our sources away too early, they might go around us, and you will get no credit or compensation.

List of Services – Copy & Paste

Below is a quick list of services with the basic qualifications and starter questions. Copying and pasting this into your CRM or other notes for a prospect can be handy. Next to each, you can note whether they qualify now and the answers to the questions, whether they might be interested in the future, or whether they are a no-go. You might also note if they know someone who could use these services.

NOTE: This section was relocated to the Example Emails & Cut Paste Info Document. We did this because copying and pasting from a PDF does not keep the formatting and adds junk from the headers and footers.

How To Get Started

Andrew: If you are just getting started and can't explain the programs well, we recommend setting up a meeting with Andrew and your prospect. He will be able to run through all the services, answer questions, overcome objections, and help them get

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started with any programs they choose. It will be an excellent opportunity for you to learn. Then, you and Andrew will partner to help guide your prospect through the process.

Video: Alternatively, you can share an overview video that covers all our services. While playing it for your prospect, feel free to pause to explain details or answer questions. The video is a quick way to get started. You can always bring Andrew in afterward to provide more in-depth information.

Are you looking for a quick win and an easy win? We recommend Class Action Law Suit, Tax Credits & Incentives, Enterprise-level Workflow Process Automation Solutions and/or the Merchant Services Audit for an easy entry point. When speaking with a prospect, you can lead with a single service, a couple, or a few and let them know you have access to other solutions. If you know them, start with something you know they will like.

1. The Visa/MasterCard Lawsuit is easy because most people don't know about it; it's their money, and they need help. Also, all they need to do is fill out a form and sign some simple documents. It's a quick win.
2. Government Tax Credits & Incentives do not require meetings (unless desired). You can guide your clients through the free calculator and sign them up during your meeting.
3. Workflow Process Automation can benefit most organizations, and they need help figuring it out.
4. The credit card audit is fast and doesn't require introductory meetings unless desired. We can conduct the audit with just three (3) statements and some information (see qualifications listed under credit services).

The results of the first service – the class action - will take a while, but it's easy. The next three services will show rapid benefits – days to weeks – with cost reduction and/or payouts. Also, if we switch a credit card client to a new processor, the commissions last for as long as they use that merchant services company.

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The Hospital Recovery program offers the highest one-time payment on commissions among the services, potentially reaching seven figures. (See Commission Examples PDF for Details). The payouts are delivered in months and can continue yearly.

Other services can be as lucrative depending on the size and how long they pay out. Each service targets a unique service pain point. We suggest running through all of the services with your prospect to see what the prospect is interested in and whom they might know. Identify their most pressing concern and offer a solution. The objective is to act as a project manager and guide them towards a starting point, facilitating their progression through our suite. Start with what is easy and then stack on solutions later. If our services help generate revenue, save costs, or recover funds for them, they'll likely be receptive to exploring additional offerings.

The longest-term solutions, potentially lifetime and beyond, include the Government Tax, Workflow, Credit Card Switch to New Provider, Telecom, AP Automation, Payroll/Paycard, and Shipping. They are long-term because they are software/hardware that facilitates an essential aspect of their business, and with things like telecom, if they ever need a change, upgrade, or downgrade, we can help them. Others can be long-term if they renew after the 3 to 5-year contract is up. Loans pay out one time, but often, clients come back for more.

You can also ask about other problems within their organization. Andrew has access to many more solutions that are not listed on the website. Some of these include Legal, Insurance, Tax, leadership development, employee satisfaction/culture building, and many more. Find a pain point, ask Andrew about a solution, and explore the possibilities with your client. Note that not all the additional services are provided on a performance model.

Types of Organizations We Work With

We say organizations because we don't just serve businesses. Please note that this list is not exhaustive, as virtually all organizations have the potential to qualify for one service or

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another. The following categories are a starting point to spark your thinking when considering your contacts and the individuals you encounter.

Organizational Types

Businesses: Startups, nonprofits, Small, Medium, Large, and multinational corporations.

Education: Primary and secondary schools, colleges, private schools, online, etc.

Medical: Hospitals, ERs, surgery centers, medical procedure practices.

Government: Federal, State, City, Towns, Municipalities, Navy/Army, Police, Fire, Jails, etc.

NGOs: Awareness, research, health, rights, protection, and everything in between.

Movers & Shakers: Celebrities, influencers, politicians, athletes, entertainers, YouTubers/TikTokers, etc.

Organization Examples

Architecture & Design, Auto-Truck-Boat & Plane Dealerships/Repair/Service, Banks, Builders, Business Services, Casinos, Commercial Property Developers, Construction Companies, Consulting & Advisory, Drop Shippers/Fulfillment Houses, , Energy Companies, Entertainment, Event Management, Financial Firms, Fitness Centers/Gyms, Gardeners, Healthcare, Medical Supply, Hospitality, Hospitals, Hotels/Motels, Insurance Agencies, Interior Design Firms, Internet Businesses, Labs, Large Workforce Companies, Legal, Maids, Manufacturing, Marketing & Advertising, Media, Medical Practices, Movie Theaters, Music & Entertainment Production, Nonprofits, Parts & Supply, Pest Control, Plumbers, Yacht, Golf & Country Clubs, Property Management, Real Estate Agencies, Real Estate Development, Recruiting, Resorts, Restaurants, Retail and Consumer Packaged Goods (CPG), School Systems, Senior Living, Service Businesses, Spas, Standalone ERs, Surgical Centers, Telecommunications, Towing, Transportation & Logistics, Travel Agencies, Window Installers, and more.

Let us know if you come up with some good ones, and we will add them to the list. Happy prospecting!

Prospect Question List

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To expedite the process, consider collecting a list of questions from your prospects and providing them to us before the meetings. If you find yourself delving into intricate details and facing numerous questions, acknowledge their value and suggest creating a list. The more detailed questions we have upfront, the smoother and shorter the onboarding process.

Submit Prospect & Required Information

You must submit your leads using this form for them to be credited to you. You will receive an autoresponder email confirming your submission. Note that submitting a lead does not mean it will be acceptable. Ensure you have a warm contact with whom we can start discussions within the organization. This contact need not always be a decision maker like a board member, CEO, CEO, or other C-level executive, but it should be someone who will be able to get us to those people. We can meet and strategize with you and your contacts.

Use the long form for prospects where you have received the answers to the qualification questions and the short form for those you have not.

Long Lead Submission Form: <https://ConsultingAce.com/Lead>

Short Lead Submission Form: <https://ConsultingAce.com/Leads>

Fill out as much information as possible. To get started, we require complete contact information. The minimum includes:

- Prospect Company/Organization
- Prospect First Name
- Prospect Last Name
- Prospect Title
- Prospect Email
- Prospect Phone
- Website
- State/Province or equivalent:
- Country
- Time Zone

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Other required questions depend on the services. See those questions under “[Primary Service Suite – The Details](#)” and “[Prospect Follow-Up V2 with Service Blurbs](#).”

Prospect Meetings – General Information

One of your primary responsibilities is to help set up meetings with qualified prospects. You can attend the meeting if you wish, but it is not always necessary.

The meeting process comprises two key phases:

1. **Need Advice?** You can submit a lead and schedule a meeting with us beforehand to strategize, provide materials, and offer necessary guidance. You can also schedule meetings after you have made contact. You can also seek advice from Andrew on how to handle any lead.
2. **Introduction:** This initial meeting ensures the prospect understands our services and is appropriately qualified. We'll review our services, determine their specific interests, and outline the following steps to move forward.
3. **Discovery:** In this meeting, prospects will meet our team and delve into the specifics of our services. Given that our services are zero-cost and performance-based, there's no risk associated with initiating a meeting or service. We may give you the calendar link of an advisor or have our team reach out; it depends on the service.\

Andrew's Contact Information & Meeting Setup

The easiest way to schedule meetings with Andrew and your prospect is to keep Andrew's calendar open during your conversation. This strategy lets you find and book a convenient time immediately. Tips: ensure the time zone matches your prospects, list them as the primary attendee, and add yourself and others as guests.

Andrew's calendar links and contact information:

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- 15-30 Minutes: <https://consultingace.com/contact-us/book-a-15-to-30-minute-meeting/>
- 30-60 Minutes: <https://consultingace.com/contact-us/book-a-30-to-60-minute-meeting/>
- Biz Toll-Free (no text): (877) 778-7719 – Corporate Line for customers only.
- Private (text & phone) (661) 727-3737 - For you to communicate with Andrew
- Note that Andrew is Pacific Time, so keep that in mind when trying to reach him.
- Email: andrewc@consultingace.com
- <https://www.linkedin.com/in/consultingace/> | Make sure you are connected

Andrew Calderella

CEO | Consulting Ace Inc. <https://ConsultingAce.com/>

Email: andrewc@consultingace.com

Founder | The 7th Foundation <https://7Way.Me/>

Corp. Phone: (877) 778-7719 - no text

Personal: (661) 727-3737 - text ok

USA - Pacific Time

LinkedIn: <https://www.linkedin.com/in/ConsultingAce/>

Qualification Zero Cost

Most services don't require any upfront cost, but a few exceptions exist.

1. The Government Tax & Incentive Recovery service typically has a SaaS paywall fee ranging from \$4 to \$9+, depending on the number of employees they plan to hire. To minimize the fee, the prospect can initially enter "1" in the employee count box and update it later during setup. Ultimately, this fee is minimal compared to the substantial revenue generated through the service.
2. Shipping may require upfront costs for customers outside our service area to get them up to speed, especially if they need equipment or software customization. However, the savings quickly offset these costs once the solution is implemented.

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3. For drug testing, instant testing kits might have upfront costs, but all come with money-back guarantees. The other services are free to set up and only charge upon use.
4. Consulting services may entail a retainer or upfront cost offset by money-back guarantees. Services that generate revenue, savings, and/or recover money greatly outweigh setup and ongoing costs.

New Referral Agent Sponsorships

Do you know someone who would make a great ConsultingAce Referral Agent? Ideal Agents have strong networks and/or frequent interactions with owners, C-Suite executives, and board members of large organizations. If you find such a person, introduce them to Andrew. If they are a good fit and would like to join, we will get them set up. You'll earn a 10% residual income finder's fee for each successful new Agent you bring on board. There are other ways to structure the commission. For example, some Agents prefer using their own company and compensation plans. We offer an additional 10% for these groups, allowing you to distribute funds within your group. See Andrew for details.

Please note that our referral program operates at a single level; we are not a multi-level marketing firm. For example, if you sponsor a new Agent (Agent1) who then sponsors another new Agent (Agent2), you will earn a commission from Agent1 but not from Agent2. Instead, Agent1 will earn 10% from Agent2.

Note that this opportunity is not open to the public at this time, and there are times when we don't onboard agents. Before introducing ConsultingAce to a potential agent, consider discussing them with Andrew to ensure they are a good fit and that there are openings. For more information, feel free to reach out to Andrew.

Submit the sponsored agent using the new lead form. Be sure to check the box for

Improvements & Your Suggestions

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Everything we do can be improved. If you notice errors, missing points, or areas needing clarification or enhancement, please share them with us. Your input is valuable, and we will integrate it into future iterations of our materials and company practices.

Our work is ever-evolving and will become what we all make of it. We aim to build the best organization possible and support you in the process. Please share your feedback through the form available on your resource page: <https://ConsultingAce.com/ACE>

I appreciate your commitment to making ConsultingAce the best for everyone!

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