NEXT *Level*

TRACE3

2025

PLAYBOOK

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2025
NEXT LEVEL

INTRODUCTION

TEAM TRACE3:

We have always embraced bold ideas, new technology, and innovative strategies to deliver results, and 2025 promises to be no different. In fact, 2025 promises to be the year we raise the bar to the next level – for ourselves, for our clients, and for our industry as a whole.

"IN THE NEW FRONTIER, GREATNESS RISES BY DISRUPTORS DELIVERING NEXT LEVEL SOLUTIONS.

Over the past three years, we have been building a rocket ship. And this rocket we call Trace3 is ready to take off.

The construction process began when we recognized our industry confronting a state of accelerated change, creating an opportunity for new revenue lines and share-shift for Trace3 and our clients. We wanted to be the victors in this **New Frontier**, and we set forth a five-year strategic plan to help us get there.

In year two, we outlined our operating path forward through **Greatness Rises**. And, in year three, we executed by being **Disruptors** of ourselves and old ways of thinking. Today, we stand on the verge of achieving the next level of Trace3's existence, and we need your help.

As we introduce our 2025 Company Kick-Off theme and operating plan, we need everyone in Trace3 working to elevate our business and the solutions we provide to the **Next Level**. This year's theme reflects the evolution of what we do for our clients and, by extension, our impact on the world. What we intend to do in 2025 is not just create the next iteration of Trace3 and our solution capabilities. This year will be a transformative, purpose-driven endeavor where we help businesses advance and solve the challenges of tomorrow.

Next Level is about how Trace3 intends to reshape the future, which means it's also about you. It's about how you are taking your role, your team, and Trace3 forward. Are you ready to take it to the **Next Level**?

DEFINING OUR NORTH STAR

A BETTER WORLD THROUGH TECHNOLOGY

TRACE3'S NORTH STAR:

An organization's "North Star" is a single guiding principle that represents the company's long-term purpose. A North Star influences decision-making and strategic initiatives while ensuring team members are aligned toward a shared objective.

Trace3's North Star integrates our brand identity, mission, vision, and a market-facing value statement into an aspirational, long-term goal that reflects what we deliver to our clients based on their needs.

Many of our clients' needs can be summed up in a few words: value realization through technology. We believe, however, that value realization encompasses far more than just technology optimization – it is about improving the experiences of our clients' end-users. As true advisors, Trace3 must think beyond narrowly focused use cases and consider how our engagement through digital consulting and innovation makes our clients' businesses and industries better. It's a **Next Level** goal, and we are up to the task.

TRACE3'S NORTH STAR

We transform businesses, industries, and the world with technology.

VALUE PROP/BRAND IDENTITY

Trace3 delivers business transformation. We consult on, integrate, and operate convergent solutions across AI, data, security, and cloud that embrace emerging technology and drive measurable value.

LAST YEAR,

we refreshed our Brand Identity to better reflect our desired position in the market. We also said disruption would begin with a Services-First mindset and then extend into Client Engagement. This Services-First strategy would require true disruption, the type of disruption "that leaves Trace3 looking quite different 12 months from now."

Well, here we are 12 months later, and today is the day. Today is the day we take it to the **Next Level.**

BRAND PILLARS

- Innovation & Emerging Tech
- Client Intimacy
- Elite Expertise

SUCCESS METRICS

- Services-First Strategy
- Targeted Client Growth
- Value Realization through Data & Analytics

GO TO

MARKET ADVANCE- MENTS (1,2,3)

1.

LEAD WITH DIGITAL CONSULTING TO DELIVER BUSINESS TRANSFORMATION

For us to solve big, meaningful problems for our clients, we need to lead with consulting – but not just the technology consulting we're known for. Rather, for Trace3 to achieve its Next Level, we must evolve into **Digital Consultants.**

Digital consulting focuses specifically on customer-centric strategies relevant to the line of business, with goals to improve customer experience, modernize business processes, drive revenue growth, and enable digital innovation.

The distinction between **digital consulting** and technology consulting is important. Digital consulting requires the underlying engineering foundation provided by **technology consulting** while solving higher-level business problems. It recognizes technology as an enabler to the business, and naturally sees technical solutions as converged, free from the constraints of IT practice silos. Digital consulting also leads to an advisor market position and adheres us to our clients' business strategies, which in turn places us at the center of our clients' data strategies.

2025 GO TO MARKET ADVANCEMENTS

1 **Lead with digital consulting to deliver business transformation**

2 **Make it easier to do business with Trace3, inside and out**

3 **Hyperfocus our growth strategy**

Given this more holistic perspective, digital consulting fits easily into a quarterback role when it comes to orchestrating the resources of technology consulting and developing custom digital solutions against a client's overarching business objectives. This perspective becomes even more acute through the deployment of **Industry Digital Consultants**, who offer unique vertical expertise in areas such as Health & Biotech, Financial Services, and Public Sector.

As of this moment, **Trace3 is committing to becoming a digital consulting organization**. This evolution, a three-year aspiration, will take time, new resources, and refreshed Go to Market strategies. We will carefully build and maneuver through this pivot in collaboration with our Innovation team, Business Unit leaders, and regional sales teams.

IN 2025, WE CAN EXPECT TO:

- Create a group who owns the pursuit and execution of large, converged digital transformation opportunities.

- Identify, train, and/or hire a small number of digital consulting resources, including some that are vertical focused.

- Prioritize key Trace3 accounts for our digital consulting Go to Market.

- Develop account-specific Client Engagement strategies to deliver solutions anchored in future technologies, resulting in true business value realization.

Becoming a digital consulting organization is **the critical path** toward Trace3's own organizational disruption. Through this disruption, we can achieve our aspirations of **Next Level** market positioning, client engagement, and business transformation – especially when it comes to AI.

MAKE IT EASIER TO DO BUSINESS WITH TRACE3, INSIDE AND OUT

2.

Three moves are underway to significantly enhance our objective of making it easier to do business with Trace3 and achieve **Next Level** growth: Client Alignment, Geographic Reach, and Services Maturity.

CLIENT ALIGNMENT: VERTICAL EXPANSION

Through the acquisition of Zivaro in December 2024, Trace3 added a third vertical to focus on the Public Sector. The addition of this talented team of 220, along with its base of SLED-FED and Critical Infrastructure clients, will increase our ability to specialize in government and compete in a new segment of the market with a projected IT spend of $231B.

GEOGRAPHIC REACH: TERRITORY OPTIMIZATION

In January 2025, we announced an important refinement to our regional model. These changes were aimed at delivering greater value to our clients through:

1. Better resource sharing
2. Expansion of best practices
3. More consistent and optimized Go To Market
4. Simplified partner and client engagement

The changes also demonstrate the positive growth trajectory of Trace3 and provide opportunities for our sales teams to break into new markets, generate new business, and expand the Trace3 brand. This year's announcement builds on changes made in July 2024 when we integrated our NorCal team into the new West region, joined our NY-NJ team with the East region, and created two new vertical specialty teams in the Health Solutions Group and the Financial Services Group. Our Go To Market coverage is now truly **Next Level**.

1 - WEST REGION

2 - MIDWEST REGION

3 - SOUTH REGION

4 - NORTHEAST REGION

5 - SOUTHEAST REGION

VERTICAL SEGMENTS

- FINANCIAL (FSG)

- HEALTHCARE (HSG)

- GOVERNMENT (T3G)

We are making important adjustments to realign key roles and functions to enhance and drive greater Services scalability, client success, and internal efficiency in 2025. Late last year, we announced the reorganization of our Services team around four key areas: Services Operations, Services Sales & Go To Market, Engineering Services, and Managed Services.

These four teams will focus their efforts in 2025 to achieve **Next Level** Client Engagement through a coordinated approach to the market supported by a centralized solution to Delivery and Operations. This includes the development of new standardized offerings, a revamped Client Services Center, a new Delivery Center of Excellence, and harmonized tools for level of effort (LOE) capture, statement of work (SOW) generation, and tracking of pipeline, vendor relationships, and contractors. More specifically, these areas will feature:

SERVICES OPERATIONS

Client Services Center (CSC) and RFP Services, Resource Management Office (RMO), third-party Staffing and Contractor Management, and general project-level operations and tools.

SERVICES SALES & GO TO MARKET

Offering Management, Forecast & Pipeline Management, Services Enablement, Deal Management & QA, systems support (specifically a new LOE tool, Provos), cross-functional collaboration of regions and business units, and general business unit-level operations.

ENGINEERING SERVICES

Design and launch of the Delivery Center of Excellence (DCOE), daily oversight of engineering project delivery and client success, management of the centralized Project Management Office (PMO), and close supervision of our Services backlog for quality, timely project closure and financial optimization.

MANAGED SERVICES

Continued Go to Market and operational enrichment under the three pillar charter of Build to Serve, Build to Engage, and Build to Scale. This includes Zivaro's Managed Services integration and promotion of new offerings around managed cloud and managed security. Other enhancements in 2025 will feature a new customer experience management program, tiered pricing across all services, a new sales enablement program, and support of new manufacturers.

Our Services growth remained robust in 2024 and, with these advancements in 2025, we are well-equipped to maintain our external focus, consistently exceed client expectations every day, and achieve **Next Level** Services Maturity.

HYPERFOCUS OUR GROWTH STRATEGY

3.

Trace3's greatest success over the past three years stems from programs where we've applied acute focus – Security, Cloud, CC&C, Data, and AI. So, as we consider our Growth Strategy for 2025, we intend to apply that same hyperfocus through a limited set of strategies and plays.

From a strategy perspective, we will continue our concentration on **Net New Clients, Top 100 Client Growth,** and **Services-First Strategy**.

New for 2025 are three growth and execution accelerators meant to increase wins and speed up sales cycles by leveraging AI and strengthening our international capabilities in support of our Enterprise clients:

Enterprise Search

RFP Automation

International Sales & Execution

ENTERPRISE SEARCH (VIA AI)

The Enterprise Search initiative is designed to fuel sales and pre-sales engineering productivity by leveraging AI. Connecting Trace3 documentation across SharePoint, OneDrive, Slack, and Outlook, a new companywide search application, Glean, will deliver more immediate and more comprehensive access to sales collateral, business unit solutions, and technical requirements. This speed-to-information outcome will save valuable time while ensuring a full understanding of Trace3's capabilities when engaging with clients and solving for advanced business transformation challenges.

RFP AUTOMATION (VIA AI)

The RFP Automation program will leverage a purpose-built tool and formal content management platform with AI functionality to streamline the RFP process and client requests for information. By providing centralized collaboration and a robust searchable content library, teams can quickly access and adapt previously created content, accelerating the RFP response process and allowing Trace3 to manage and utilize content in a more efficient way. The tool's GenAI capabilities can autogenerate suggested responses using qualified Trace3 resources, significantly reducing the time spent manually creating new content or searching for relevant content to address client, industry, or solution-specific proposal requirements.

INTERNATIONAL SALES & EXECUTION

Trace3 will take our international business to the Next Level by formalizing a new practice around International Sales and Execution for our global clients. A massive opportunity exists in this space, and Trace3 has the necessary building blocks – particularly our West Coast and Midwest shipping and warehousing facilities – to deliver excellence through a focused strategy and assimilation of existing resources. The plan here will include dedicated sales and shipping support under the leadership of our Sales Execution team. The new practice will feature client sales support, workflow and process improvements, deal management, partner alliance management, and shipment and delivery tracking.

In support of these six key strategies, we will also introduce new hyper-focused Business Unit offerings for 2025. These plays are the underpinnings of **NEXT LEVEL GROWTH STRATEGY** and will be supported by sales and technical enablement through our Legends program, marketing collateral, partner development, and Business Unit coordination.

In keeping with Trace3's DNA around emerging tech, the Innovation team will continue to push its influence within Trace3 as a differentiator. Data shows that an Innovation-led client strategy creates a consultative, advisory style engagement and pivots sales conversations toward strategic business planning. This, in turn, puts Trace3 at the center of our clients' data strategy. These conversations grow our impact with existing clients, provide door-openers for net new clients, and open new lines of business within our top clients. Emerging tech creates a 2.5x multiplier effect on client share of wallet through additional Trace3 services and product. If you are not selling Trace3 Innovation, you are not maximizing your client opportunities.

Specific to one of these emerging technologies, the Cloud Security fusion team has identified WIZ as the leading product in the Cloud Security space. The fusion team has built a Trace3 offering that is easy to explain and consume and offers a unique differentiator to drive a **Services-First** conversation. Much more on this play can be found on the Trace3 HUB intranet.

POWERED BY WIZ

WIZ — GAIN VISIBILITY ▼

TRACE3 — REDUCE CRITICAL RISK ▼

TRACE3 — DEMOCRATIZE SECURITY ▼

TRACE3 — DEVELOP SECURELY ▼

TRACE3 — RESPOND TO THREATS ■

DATA & ANALYTICS

The Trace3 Worldwide Intelligent Near Sourcing (TWINS) solution provides flexible, cost-effective access to expert Data & Analytics resources tailored to client project needs. Whether through fractional teams or fully dedicated engineers, TWINS delivers **Services-First** resourcing such as data engineering, architecture, BI development, and data science.

SECURITY

The Security Resiliency offering focuses on safeguarding organizational integrity through a robust and comprehensive cybersecurity assessment process. By evaluating risks, vulnerabilities, and compliance gaps, the program enhances security maturity and operational resilience through a **Services-First** engagement.

AI (CLOUD)

The Trace3 Azure AI Power Play combines the strengths of Microsoft and Trace3 to deliver a unique **Services-First** platform to help clients unlock AI-driven applications and create innovative solutions within a secure environment. Program outcomes feature operational excellence while generating new revenue opportunities.

CONTACT CENTER & COLLABORATION

CC&C's Evaluate, Validate, Demo, Close (EVDC) initiative is a turnkey **Services-First** program designed to take our Contact Center clients to the cloud. Through EVDC, the CC&C team Evaluates the client's current solution, Validates the appropriate replacement, Demonstrates the business value, and Closes the opportunity within a 90-day window.

MANAGED SERVICES

Trace3's Managed Network Services offer 24/7 monitoring, proactive management, and enhanced security for network components such as routers, switches, and firewalls. Businesses can rely on optimized performance and cost efficiency while focusing on strategic priorities. The Managed Network Services solution delivers comprehensive visibility, operational focus, enhanced network reliability, and cost optimization through a dedicated team of experts that can support all major platforms and manufacturers under a performance service level agreement.

These hyper-focused offerings help keep the world around us secure, intelligent, automated, and connected. They are the stepping stones to NEXT LEVEL plays of tomorrow.

METRICS

& OKRS

As noted last year, Trace3 adopted and simplified critical performance milestones that define success through the lens of our three brand pillars of Innovation & Emerging Technology, Elite Expertise, and Client Intimacy. These measures are: Services-First Strategy, Targeted Client Growth, and Value Realization through Data & Analytics.

In support of these measures, below are the high-level metrics we've set for 2025. These metrics will be reported on routinely through our various company communications vehicles.

SERVICES-FIRST STRATEGY

- Services GP Bookings Growth = **20%**

TARGETED CLIENT GROWTH

- Overall GP Bookings Growth = **10%**
- Emerging Tech Growth = **20% of Booked GP**
- Net New Clients = **400 net new clients generating $20M of GP**

VALUE REALIZATION THROUGH DATA & ANALYTICS

- Creation of **PMO-standardized Value Realization Reporting** for qualifying Services projects.

CALL
TO ARMS

As leaders in our industry, Trace3 must continually push to innovate, stay one step ahead, and strive for a client experience that is **Next Level**. This requires all stakeholders within our organization – regions, BUs, functional teams, and all teammates – working together. In doing so, we must routinely ask ourselves key questions to ensure we're staying pointed at our North Star: to make a better world through technology.

FOR ORGANIZATIONAL LEADERS, THESE QUESTIONS FOCUS ON:

- Are we building and retaining **Next Level** teams in terms of expertise and culture?

- Are we thinking about the **Next** set of tactics to advance in the market and beat our competition?

- Are we developing a **Next** gen portfolio of services and products?

FOR INDIVIDUALS, THESE QUESTIONS FOCUS ON:

- Are we proactively enhancing our **Next Level** skills?

- Are we having **Next Level** conversations with our clients, partners, and fellow teammates?

- Are we collaborating across Trace3 so we all can take it to the **Next Level**?

NOW,

as we kick off 2025 and look ahead to what promises to be a very exciting year, we are encouraged to consider these questions and what we individually and collectively can do to actualize our **Next Level** vision. To achieve **Next Level**, everyone at Trace3 must find a way to **step up** for our clients, for their business transformation, and for their value realization through technology.

LET'S TAKE IT TO THE

NEXT LEVEL!