

DEPARTMENTAL INPUT
CONTRACT/PROJECT MEASURE ANALYSIS AND RECOMMENDATION

New OTR Sole Source Bid Waiver Emergency Previous Contract/Project No. _____

Contract _____
 Re-Bid Other LIVING WAGE APPLIES: YES NO

Requisition No./Project No.: RQET1300014 TERM OF CONTRACT: 1 YEAR(S) WITH 3 YEAR(S) OTR

Requisition /Project Title: GSA Schedule 70 Contract GS-35F-0041U - General Purpose Commercial Information Technology Equipment, Software, and Services - Info-Tech

Description: The purpose of this request is to allow ITD to purchase Advisory Services from Info-tech Research for members of the IT Leadership Council from Info-Tech Research Group Inc. (Info-tech).

Issuing Department: ISD Contact Person: Margaret Brown Phone: 305-375-4914

Estimate Cost: 80,000.00 Funding Source: GENERAL FEDERAL OTHER Internal Svc

ANALYSIS

Commodity Codes:	<u>918-29</u>		
	Contract/Project History of previous purchases three (3) years Check here <input checked="" type="checkbox"/> if this is a new contract/purchase with no previous history.		
	<u>EXISTING</u>	<u>2ND YEAR</u>	<u>3RD YEAR</u>
Contractor:			
Small Business Enterprise:			
Contract Value:	\$	\$	\$
Comments:			

Continued on another page (s): YES NO

RECOMMENDATIONS

	Set-aside	Sub-contractor goal	Bid preference	Selection factor
SBE				

Basis of recommendation:

Signed: Margaret Brown Date sent to SBD: 6/28/13

Date returned to DPM: _____

RECEIVED
 DEPT. BUSINESS DEV.
 2013 JUL -1 PM 1:29

Walters, Vivian (RER)

From: Karim Ben Sari [kbensari@infotech.com]
Sent: Thursday, June 20, 2013 5:13 PM
To: Viera, Deborah R. (WASD)
Cc: Cardoso, Mirta Lopez (ITD); Brown, Margaret (ISD); Manduley, Julian R. (ITD); Dave Bell
Subject: RE: Question

Hi Debbie!

You are correct in that all of our memberships are on the GSA Schedule 70, but it brings up a few options for you that I wanted to make sure I explained.

Since Miami Dade is categorized as an **ENTERPRISE MEMBERSHIP** (100+ FTE IT), you have a few options. We have quoted you on an Enterprise Customer approach, The quote you have is based on 8 users for \$64,900. The reason we've done this is so we can think of it as an open license. The goal we've talked about is to learn how ITRG can work with the IT Dept's of Miami Dade so going Custom ENTERPRISE made sense.

The other option on the GSA schedule is for **Single Advisory seats**. Those are \$9,075 USD each. I think we're doing better with the economics of the custom package we put together.

So originally when you had requested 6 single users, it made more sense to buy them individually. Likewise, if you chose to do 7 instead of 8, you could directly get the Single Advisory seats for a total of \$63,525.

The custom package for 8 is \$64,900 and the additional option of adding future seats for \$5,000 (this is Custom ENTERPRISE pricing).

Make sense?

Long story short, they're all on GSA Schedule 70 and can be found here:

<http://www.gsaelibrary.gsa.gov/ElibMain/contractorInfo.do?contractNumber=GS-35F-0041U&contractorName=INFO-TECH+RESEARCH+GROUP&executeQuery=YES>

Please let me know if you have any further questions – I know it can seem a bit confusing at times.

Karim Ben Sari | Business Development Manager
Email: kbensari@infotech.com | Phone: 1-519-432-3550 ext 2762



Are you aware of our [Referral Program?](#)

From: Viera, Deborah R. (WASD) [<mailto:DRV@miamidade.gov>]
Sent: Thursday, June 20, 2013 4:33 PM
To: Karim Ben Sari
Cc: Cardoso, Mirta Lopez (ITD); Brown, Margaret (ISD); Manduley, Julian R. (ITD)
Subject: Question

Could you please confirm for all on this email if the prices you are quoting are from GSA Schedule 70 contract?

Deborah R. Viera

MDWASD IT Division Chief

(O) 786 552-8288

(BB) 305 216-0617

(PC) 786 229-8267

Non-Competitive IT Project Review

Directions for Completion: Departments requesting a non-competitive project review for new or existing Information Technology (IT) Systems are required to complete this questionnaire along with the appropriate Bid Waiver/Sole Source Justification Form. The response and explanation fields are to be fully completed to provide all background on the project. Please be as specific as possible and provide all backup documentation, doing so will expedite the review of your project.

The answers provided in the response field shall be according to the following format:

- "Y" – Yes
- "N" – No
- "N/A" – Not applicable

Current Contract Information:		
<u>Questions:</u>	<u>Response:</u>	<u>Explanation:</u>
When and how was the IT software/hardware initially purchased by the County? (Please provide contract number, award info, and applicable documentation)	N/A	This is a new request is for advisory services. No software or hardware is involved.
When does the current contract expire?	N/A	This is a new request
If the contract has expired, how are/have you been maintaining the IT hardware/software? (Provide explanation and documentation if applicable)	N/a	This is a new request
Was maintenance and support included in the current contract? If no, why not? Did it include assistance with transition to a new system?	N/a	This is a new request
What other applications does the System integrate/interface with?	N/a	This is not a system

Non-Competitive IT Project Review

<p>If a new system were deployed would it still be necessary to support the current system in parallel? How long would the legacy system need to be maintained and operational? Could historical data be stored in a data warehouse? What would be the cost?</p>	<p>N/A</p>	
<p>What is the purpose of this IT hardware /software? What is the expected life cycle?</p>	<p>N/A</p>	
<p>Is this product an integral part of the County / Department's technical infrastructure? Does it perform system critical functions? If so, what?</p>	<p>N/A</p>	
<p>Are these solutions delivered through the Original Equipment Manufacturer (OEM) support? If no, is it delivered through authorized reseller or dealers?</p>	<p>N/A</p>	
<p>On the current contract, is the User Access Program (UAP) and Inspector General being collected?</p>	<p>N/A</p>	<p>This is a new request</p>
<p>Does the current contract require insurance? <i>(Note: Any vendor required to come onto County property is required to have insurance throughout the term of the Agreement.)</i></p>	<p>N/A</p>	
<p>Have you encountered any issues during the contract term regarding performance or compliance?</p>	<p>N/A</p>	
<p>Have you been satisfied with the performance of the vendor to date?</p>	<p>N/A</p>	

Non-Competitive IT Project Review

Market Research:	Response:	Explanation:
Questions:		
Are there available equivalents to the product or service you are requesting for this new project? <i>(Please provide documentation regarding your Department's market research)</i>	Yes	Gartner advisory services are similar, but the services for Infotech have a different pricing structure more advantageous to the county for what is needed now. We continue utilizing Gartner's services as well, which has a separate contract (only for Gartner). See detailed description of pricing structure for Infotech under the attached Justification document. Gartner services are tied to specific individuals is much more expensive: Example: POET1300453 BR 12/21/12 CLOS 51,532.98 FOR WASD POET1300571 BR 01/14/13 PVCH 83,227.41 FOR MIA only
If there are available equivalents, why do these products not meet your needs? What are the differences? <i>(Please be as specific as possible to provide sufficient detail to justify your request.)</i>		
Can the vendor meet your long term needs? What research has been conducted to verify their ability to meet your expectation? <i>(Please provide documentation, as applicable, to show your findings)</i>	Yes.	See attached detailed justification
What other vendors offer systems capable of providing the County with a solution?	N/A	This is not a system.
Are these solutions delivered through the Original Equipment Manufacturer (OEM) support or is it delivered through authorized reseller or dealers.		The services are not available through resellers.

Non-Competitive IT Project Review

<p>Are dealers required to complete a certification program or are they restricted to levels of support set up by the vendor/mfg? <i>(i.e. gold plan vs. platinum plan – gold allows vendor to maintain equipment but they do not have access to software upgrades or new system implementations. Platinum allows vendors to complete new product installs and all other support).</i></p>	N/A
<p>What level support does the County require for this new project?</p>	N/A
<p>Are there other systems currently employed by the department / County that are similar that could provide a solution?</p>	N/A
<p>If a new system were deployed would it still be necessary to support the current system in parallel?</p>	N/A
<p>How long would the legacy system need to be maintained and operational?</p>	N/A
<p>Could historical data be stored in a data warehouse? What would be the cost?</p>	N/A
<p>Has the replacement system been reviewed and approved by the IT Leadership Council?</p>	N/A

Non-Competitive IT Project Review

New Project Information:	
<u>Questions:</u>	<u>Response:</u>
<p>What are the business goals and objectives of this new project? (Please be specific)</p>	<p>Explanation: The Miami-Dade Information Technology Leadership Council (ITLC) membership is undertaking several projects to meet a myriad of initiatives and goals in accordance with the various business plans of the departments within Strategic Areas. The successful planning and execution of these projects require access to IT research and advisory services in an effort to understand the technologies being considered, effectively plan based on an experienced knowledge base, reduce IT costs, increase business efficiencies and improve service delivery to our constituents.</p> <p>See additional details under the justification document attached.</p>
<p>What contract term would you like established? (<i>Initial term plus any renewals</i>)</p>	<p>One year trial period with optional OTRs.</p>
<p>What allocation is requested on this new project? What is the basis of the allocation request? (<i>i.e. Vendor quote, market research, etc</i>)</p> <p>Please provide documentation if applicable.</p>	<p>\$80,000</p>
<p>What is your funding source(s) for this new project?</p>	<p>Internal Services funds</p>
<p>Is this a grant funded project? If so, please provide grant documentation outlining the expiration date and requirements.</p>	<p>No</p>
<p>What budget year is it scheduled for?</p>	<p>Current 2012-2013</p>
<p>Is the allocation enterprise or department based?</p>	<p>Countywide</p>
Scope Information:	

Non-Competitive IT Project Review

<u>Questions:</u>	<u>Response:</u>	<u>Explanation:</u>
Please provide a high level overview as to the scope of this project. A defined scope of work is to be provided with your submission.		
What is your Project Timeline?		We need the services as soon as possible. Award by end of July will be appreciated.
What are the roles and responsibilities of the vendor?		See detailed vendor proposal for advisory services and research libraries to be provided.
What are the roles and responsibilities of the County?		To access vendor's advisory services when needed.
Software Acquisitions:		
<u>Questions:</u>	<u>Response:</u>	<u>Explanation:</u>
Is this a replacement of an existing software/system?	No	
Is the software perpetual? If so, please provide a copy of the license agreement with your submission.		There is no software involved
Do you require professional services on the new contract? (i.e. Training, custom programming, consulting)	No	Only their "pre-packaged" advisory services
How is the software licensed? (i.e. Per User, Enterprise, Concurrent User, Site)		There is no software involved
How many users?		Multiple departments countywide
Do you want/need the new contract to provide the option to purchase additional licenses or services during the term?	Yes	Additional departments may be added
Do you require training for users on the new contract? How many users are to be trained? Levels?	No	

Non-Competitive IT Project Review

Where is the software hosted?		There is no software involved
Do you have a disaster recovery plan? If no, is the vendor required to provide collocation under the new contract?	N/A	
What are your long term plans with the system?		This is not a system.
Do you have the source code?		There is no software involved
Would you like software escrow added to the new contract?		There is no software involved
What is the life expectancy of the software? What value does this project provide to your department?		There is no software involved
Hardware Acquisitions:		
Questions:	Response:	Explanation:
Was maintenance and support included in the original contract? If not, why?		There is no hardware involved
Did it include assistance with transition to a new system?		This is not a system
Is this product an integral part of the County / Department's technical infrastructure?		There is no product involved
What are the requirements for maintenance and support under the new contract?		There is no hardware involved
Will the vendor be required to come onto County property to provide technical support/assistance? If not, how will this be accomplished?		Services are provided remotely

Non-Competitive IT Project Review

<p>What level of support is required by your Department under the new contract? (i.e. 24x7, onsite repair, parts, etc.)</p>	<p>N/A</p>
<p>Does it perform system critical functions? If so, what?</p>	<p>N/A</p>
<p>What would be the effect to the County if the maintenance / support services were not obtained?</p>	<p>This is not a system.</p>
<p>What other systems does the hardware integrate/interface with?</p>	<p>N/A</p>
<p>Will the new contract require the vendor to maintain these integrations/interfaces with these systems also?</p>	<p>This is not a system.</p>
<p>What is the life expectancy of the hardware?</p>	<p>N/A</p>
<p>What value does this project provide to your department?</p>	<p>There is no hardware involved Infotech will allow access to technical information that can assist with timely and effective decision-making. Services provided include: research papers; analyst reviews; analyst calls; IT metrics of all types; benchmarking; peer networking; tools and templates; vendor analysis and review; best practices; disaster planning and recovery; and the latest technology issues, eg., cloud, big data and BYOD.</p>
<p>Do you need to have the ability in the new contract to purchase additional hardware components, parts, or services? If so, please provide a detailed explanation as to your Department's requirements.</p>	<p>N/A</p>



**INTERNAL SERVICES DEPARTMENT
PROCUREMENT MANAGEMENT SERVICES**

Justification/Input Document for Non-Competitive Acquisition

It is the policy of Miami-Dade County to consistently purchase goods and services using full and open competition. The citizens of Miami-Dade County are best served when we make sound business decisions based on competitive bids or proposals. Early acquisition planning that includes consultation with Internal Service Department's procurement staff can help avoid delays and facilitates effective market research. However, there may be instances when other than full and open competition may be justified. When a user department(s) determines that other than full and open competition is necessary or in the best interest of the County, appropriate justification for that course of action must be submitted to ISD for approval and execution in order to waive the competitive bid/proposal process.

Please provide the information requested below to support the need and feasibility for waiving the competitive bid/proposal process:

Department:	ITD on behalf of the IT Leadership Council		
Contact Person:	Mirta Cardoso	Phone Number:	305-596-8690
Requisition No.:	RQET1300014	Estimated Value:	\$60,000
Proposed Vendor:	Infotech Research		
Previous Contract Number:	N/A	Previous Contract Value:	N/A

Purpose of the Purchase

Please describe your minimum requirements and the benefits of making the acquisition.

This request is to purchase Advisory Services from Infotech Research for the IT Leadership Council.

Best Interest of the County / Uniqueness of Product

Please provide a detailed description as to why a waiver of formal bidding is in the County's best interest (e.g., product standardization, compatibility, proprietary access or distributorship, how vendor is uniquely qualified to provide the needed product or service, etc.). Please note that a lack of advance planning is not an acceptable justification for a non-competitive acquisition.

The Miami-Dade Information Technology Leadership Council (ITLC) membership is undertaking several projects to meet a myriad of initiatives and goals in accordance with the various business plans of the departments within Strategic Areas. The successful planning and execution of these projects require access to IT research and advisory services in an effort to understand the technologies being considered, effectively plan based on an experienced knowledge base, reduce IT costs, increase business efficiencies and improve service delivery to our constituents.

The business model to engage Infotech services for the ITLC affords broad participation among

different departments, sharing one cost structure. The licensing offered provides one cost, which can then be divided among participating departments, greatly reducing costs. After 7 seats are procured, the cost for each additional seat is reduced to \$5,000. The total cost is divided among the participating departments. This allows for departments that could not afford service to gain access via one ITLC membership to technical information that can assist with timely and effective decision-making. This model bridges the budgetary gaps that exist in several departments by significantly lowering the cost.

Services provided include: research papers; analyst reviews; analyst calls; IT metrics of all types; benchmarking; peer networking; tools and templates; vendor analysis and review; best practices; disaster planning and recovery; and the latest technology issues, eg., cloud, big data and BYOD.



**INTERNAL SERVICES DEPARTMENT
PROCUREMENT MANAGEMENT SERVICES**

Market Research

Please describe your market research and the results thereof. This should include a description of other, similar sources or products available in the market if any and why they are not acceptable.

We have purchased similar services for IT advisory services from other vendors, but the pricing model for Infotech is more advantageous for the ITLC. The Infotech pricing is cost effective in that unlimited access for each department as the shared cost goes down with each participant. In this case, \$59,899.00 for 7 participating departments @\$8,557 ea. = \$59,899.00

Other services are licensed to a specific individual or individuals depending on the service. Sample pricing, is as follows: to use as a "Reference" is only to access reference material, and "Advisor" includes contact with analysts.

IT Leader Single Reference (licensed to a specific individual)	\$ 20,624
IT Leader Advisor (licensed to a specific individual)	30,633
Core Research Inquiry for 5 access instances only	6,767

ITLC Intro Bundle being offered by Infotech (access to all content and services):

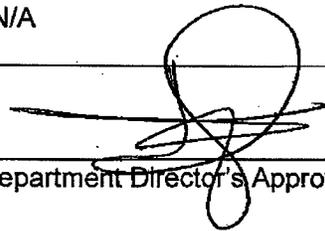
- \$34,900 for 3 Individual GOLD Single seats
- \$42,500 for 4
- \$49,500 for 5
- \$54,900 for 6
- \$59,900 for 7

- Any additional seat would be an additional \$5,000
- \$64,900 for 8
- \$69,900 for 9
- \$74,900 for 10 ... etc.

Proposed Actions

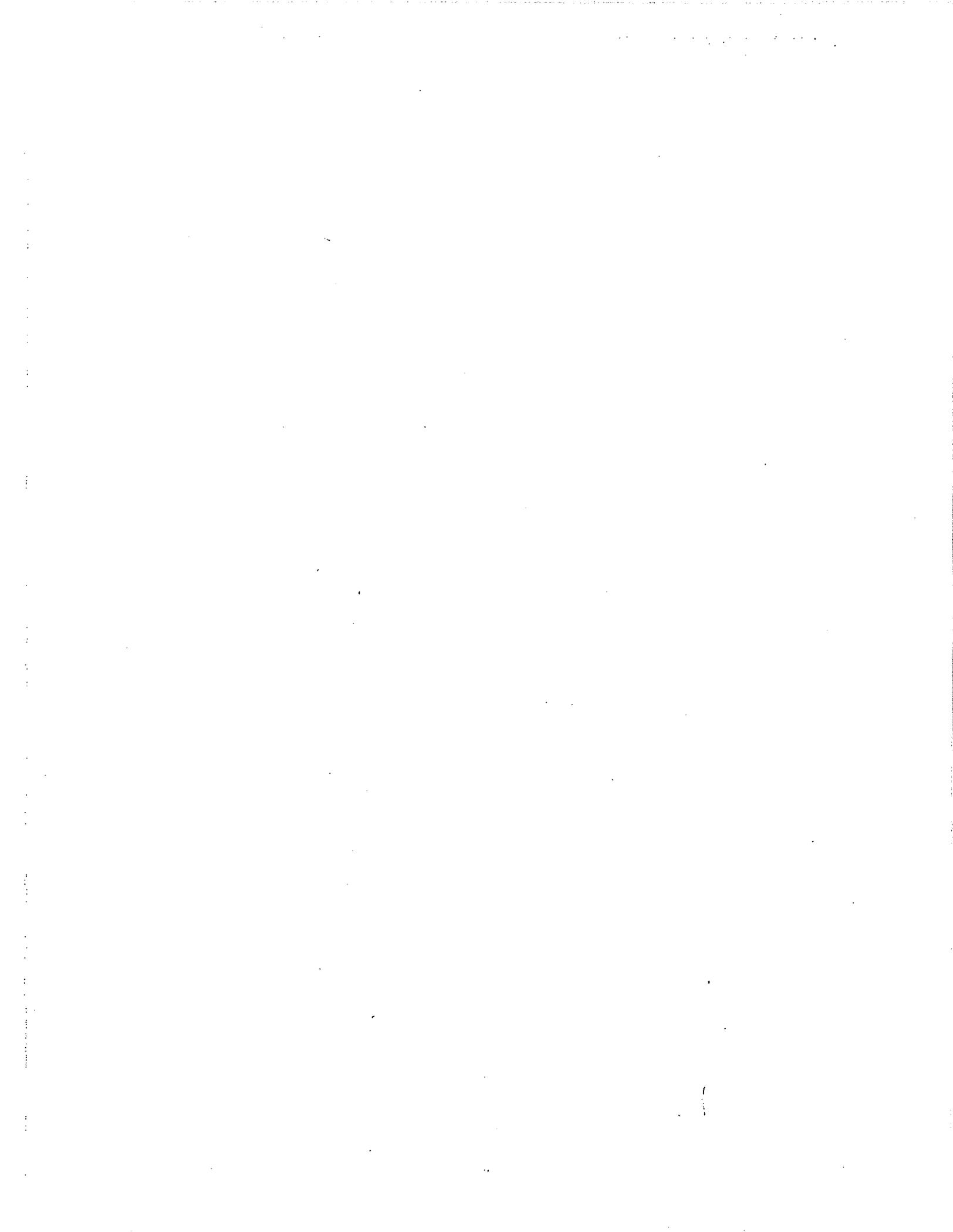
Please describe the actions the department will take to overcome the present barriers to competition prior to any future acquisitions of this product or service.

N/A



Department Director's Approval

6/5/2003
Date Approved



PROPOSAL

Research and Advisory Services

Prepared for: Deborah Viera,
MIAMI-DADE IT LEADERSHIP COUNCIL

Prepared by: Karim Ben Sari, Account Representative
Info-Tech Research Group

Date: September 25th, 2012

Valid Until: October 31st, 2012

Proposal for IT Research

MIAMI-DADE IT LEADERSHIP COUNCIL requires access to IT research in an effort to reduce IT costs, increase efficiencies and improve service. MIAMI-DADE IT LEADERSHIP COUNCIL requires their IT research vendor to have extensive experience, cover a wide breadth of topics, and provide practical solutions that are ready to implement. Info-Tech Research Group Inc. is confident that it meets and exceeds these requirements and looks forward to fulfilling your company’s IT research needs.

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1 About Info-Tech Research Group

Info-Tech Research Group Inc. (Info-Tech) is a research and advisory firm providing practical solutions to IT challenges via executable research, tools and advice that have a clear and direct impact on your business. Our services include research and advisory memberships, best practice development programs, and consulting services.

Together, these services help you work more effectively, make better decisions, align IT strategy to your business' goals and reduce IT risk. Our comprehensive solutions include tools and templates to support your IT initiatives, providing immediate practical application for measurable results.

Info-Tech creates complete solutions that supply the tools you need to get each project done right.

In 2010, Info-Tech became the 10th largest IT research firm in the world. More than 24,000 members at 8,000 organizations use our services, and we are committed to providing independent guidance and effective advice to our clients.

1.1 Research Industry Benchmarks

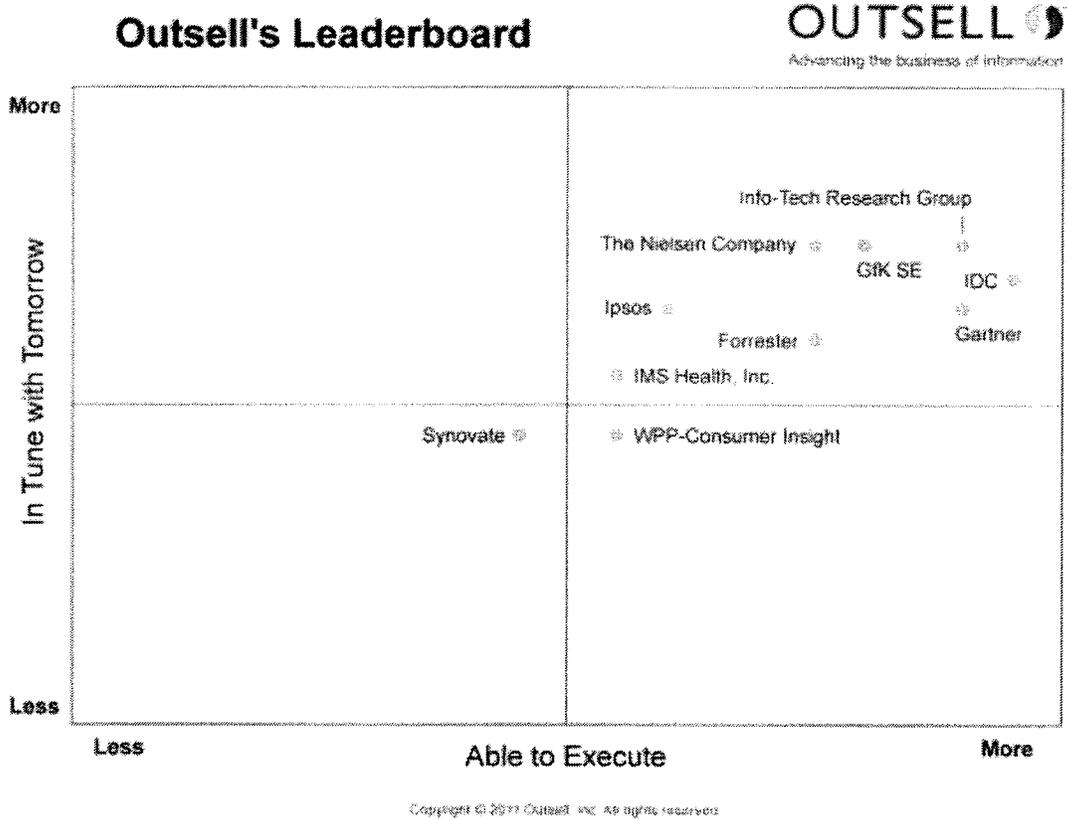
Outsell, Inc. (an independent market research firm) conducts an annual evaluation of the Information Market. Consistently, their results placed us as a rising star in terms of our "ability to execute" and being "in tune with tomorrow". This positioned us above Gartner, Forrester, Burton Group and IDC.

Outsell's latest report says: Info-Tech Research Group is an IT research firm that has focused on companies just below the Fortune 500 level. It focuses on providing tactical tools to help the IT/CIO function select technology solutions. The company has found a need it could fill and has been growing quickly in a market space that was largely under served. With continuing momentum and a new suite of web-based tools, Outsell expects the company to continue on a strong growth path for the next few years. Info-Tech Research Group is an interesting leader as it has seen 15% to 20% revenue growth rates the past couple of years and has grown into a solid firm with a solid footprint among CIOs at mid-market firms. It built a robust set of web-based tools and provides actionable data as well as advisory services for its target market.

See the snapshot view of their evaluation on the following page:

Outsell's IT & Telecom Research, Reports and Services Top Companies

Outsell's ITRRS Leaderboard: Mapping the Companies Positioned to Lead



Source: Outsell's Publishers & Information Providers Database
© 2011 Outsell, Inc.

2 Research and Advisory Memberships

2.1 Info-Tech Research

([About our Research Memberships](#))

2.1.1 Team Access

Info-Tech memberships are based on a team licensing model that allows access for all IT staff. Making our research available to your team results in:

- **Improved productivity.** Each team member will spend less time hunting for tools and resources to get things done when they can rely on their Info-Tech membership to provide comprehensive solutions specific to the project at hand.
- **Easier knowledge sharing and training.** Processes and best practices can be readily applied by all team members, making it simple to pick up where someone else leaves off.
- **Consistent access to our tools and resources.** Keeping everyone on the same page can be a challenge; providing your entire team with access to our research ensures that proven methodologies and effective tools can be applied throughout the department.

Your membership helps you develop your team by refining their skills, increasing their efficiency and training them effectively.

2.1.2 Online Research Overview

Our research provides complete solutions to your specific IT challenges with step-by-step guidance and unique sets of tools designed to help you successfully complete each phase of the project at hand. We provide support for your key responsibilities and tasks, including:

- Assessing trends and developing strategy
- Making technology decisions
- Implementing new technologies and processes
- Managing and improving IT operations

We take a project, break it down into steps, and then provide you with the tools to get each step done. This eliminates guesswork and hunting for resources; everything you need is easily accessible in one convenient location, when you need it.

2.1.3 Solution Sets

Info-Tech research is built around a tool-based model that incorporates analysis, advice and the tools you need to get things done. You get access to:

- Practical tools and resources packaged in **Solution Sets**:
 - Step-by-step, task-focused guidance for every project
 - All of the tools required to complete the project, in one location
 - **Solution Maps** that connect the tasks within the context of the project, so you can jump in at any point and easily find the right tools

Practical Research that Drives Measurable Results

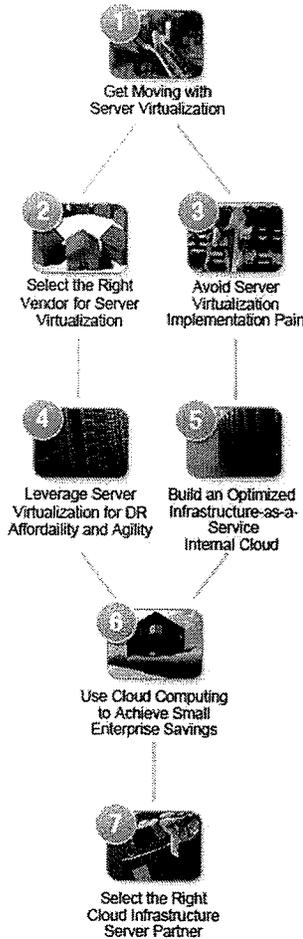
- In the **Solution Map**, we take a holistic view of a project, break it down into individual tasks, and then address those tasks from your point of view.

This unique approach to IT research provides you with the knowledge you require to make critical decisions paired with the tools you need to get the job done.

Sample Solution Map and Sets

Example taken from server and storage virtualization:

I Need to:
Solution Road Map



Solution Sets

- Get Moving with Server Virtualization**
Save money while building an agile, efficient and resilient server infrastructure.
Included in Solution Set: 1 PowerPoint, 1 note, 1 video and 3 tools.
[Enter Solution Set](#)
- Select the Right Vendor for Server Virtualization**
VMware continues to dominate but Citrix and now Microsoft offer viable alternatives.
Included in Solution Set: 1 PowerPoint, 10 Notes, and 1 Video
[Enter Solution Set](#)
- Avoid Server Virtualization Implementation Pain**
Virtualization is not a magic bullet. Poor scoping of infrastructure and business needs will lead to implementation pain.
Included in Solution Set: 1 PowerPoint, 2 Notes, 1 Tool
[Enter Solution Set](#)
- Leverage Server Virtualization for DR Affordability and Agility**
Virtualization is not just for consolidation - drive cost and complexity out of system availability and restore.
Included in Solution Set: 1 PowerPoint, 1 Video, and 6 Notes
[Enter Solution Set](#)
- Build an Optimized Infrastructure-as-a-Service Internal Cloud**
The best computing cloud is the one you've already started with server virtualization.
Included in Solution Set: 1 PowerPoint, 4 notes, 3 videos
[Enter Solution Set](#)
- Use Cloud Computing to Achieve Small Enterprise Savings**
- Select the Right Cloud Infrastructure Server Partner**

In the above example, the Solution Map comprises seven unique Solution Sets.

These Solution Sets provide you with comprehensive packages of advice and tools to walk you through the key challenges you face, including:

- **Executive presentations** of all of our key recommendations
 - Communicate effectively with your own stakeholders
- **Supporting data and case studies** from the Info-Tech global network

Practical Research that Drives Measurable Results

- Leverage your peers' best practices
- **Decision tools, templates, and polices**
 - Use tested tools and proven methods
- **Video summaries** of our point of view and analysis
 - Keep your team up-to-speed easily using our subject matter experts

New Solution Sets are published each week to provide you with coverage of the IT issues you're facing on a daily basis.

Note: For more details about the topics covered in our research, please refer to Appendix A.

2.1.4 World Class Operations

World Class Operations provides the best practices and implementation support necessary to help an IT leader build a World Class IT Operation, and it is a key component of your membership. We believe that core processes are the foundation of success and the most important predictor of an IT leader's effectiveness.

Through a systematic process designed to create measurable results we help you to:

- Analyze your core capabilities
- Leverage best practices research and workshops to continually improve
- Create all the deliverables needed to build your World Class Capabilities

World Class Operations is designed to help you focus attention, create alignment and ensure that best practices are put to work within your IT organization. We have built a uniquely effective process that is designed to be delivered as a 40 hour high-impact workshop. All of the research, tools, and templates are included with your membership to enable you to conduct your own workshop.

For an additional fee we will send one of our industry specific World Class Operations Practice leaders on-site to conduct a customized workshop with your team. The Practice Leaders are able to combine their many years of deep experience and the written research to provide an engaging experience that focuses on implementing and getting to measurable results in one week.

The following core areas are currently covered by World Class Operations:

- IT Strategy
- Service Desk
- Requirements Gathering
- Portfolio Management
- Risk Management
- Cost & Budgeting

[Visit the World Class Operations home page](#) for complete program details and outlines of the topics covered.

Practical Research that Drives Measurable Results

2.1.5 MeasureIT

MeasureIT is a customized peer benchmarking program that compares your budget and staffing with those of your peers, including companies in similar industries and of similar size. It generates your results immediately, for instant access to over 100 metrics that can help you justify your spending and staffing requests.

MeasureIT will help you:

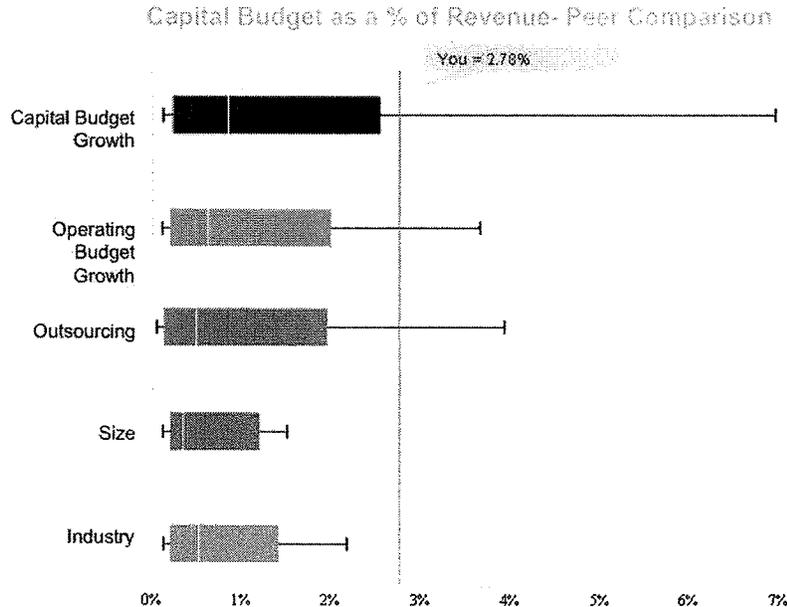
- Justify your spending with valuable budget data customized to your company
- Compare your staffing practices with those of your peers to see if your department is in line with those at similar organizations
- Access (in one convenient program) over 100 custom metrics that are impossible to find anywhere else

For example, a one of the metrics included in the MeasureIT budget benchmark report is "Capital Budget as a Percentage of Revenue". You can see, at a glance, how your relative spending level compares to other organizations with similar:

- Growth in capital budget
- Growth in operating budget
- Involvement in outsourcing
- Size based on revenue
- Industry

Sample MeasureIT Benchmark Results

Example below taken from: Instant IT Benchmarks: [MeasureIT for Budgeting](#)



Visit [MeasureIT for Budgets](#) and [MeasureIT for Staffing](#) for complete details.

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2.1.6 Purchase Optimization

Technology purchases rarely fall in favor of the buyer. It takes an expert third-party review to identify any shortcomings or unnecessary costs. Our analysts will review your IT product or services RFP-responses, quotes, proposals, or contract to ensure you get the best deal.

We apply a five-point inspection to your deal, reviewing licensing, specs & features, terms of service, cost per unit, and discount levels. You receive a report with recommendations on how to reduce costs, mitigate risks, and optimize your purchase.

We save our clients millions of dollars each year. Whether you're purchasing Anti-Malware software, storage, networking gear, enterprise applications, or more...contact us today!

Clients frequently use our Purchase Optimization service to refine their **Microsoft Licensing**. We help you:

- Navigate the complexities of MS Licensing to choose your best option.
- Avoid over-spending for license features you don't need.
- Identify opportunities to save money or avoid anti-piracy penalties.
- Right-size your costs and products to your organization's needs.

2.1.7 Peer-to-Peer Networking

You get a coordinated, facilitated conversation with knowledgeable peers about your questions, on-demand, followed by a summary report.

- Get answers to your questions by talking with industry peers
- We solve the hassle by arranging, hosting, and facilitating the conversation
- Don't worry about taking notes, we've got it covered
- Easy to use

Every day, your peers are sharing their industry-based insights on topics such as these:

- Process (e.g. Help Desk Staffing, DRP Coverage, Requirements Gathering)
- Challenges (e.g. Taming out-of-control vendors, Managing outsource suppliers)
- Projects (e.g. Cloud applications, SAN Storage, Data Integration/Master Data)

2.1.8 Predicting the Future

Your membership includes access for three members to our Predicting the Future research notes.

Written by technology expert and Info-Tech Research Fellow Mark Anderson (CEO of the Strategic News Service), our Predicting the Future reports complement the Strategy & Leadership component of an Info-Tech membership.

Mark is renowned for creating the most accurate predictive newsletter covering the computing and communications industries. His Strategic News Service is read by top executives and financial analysts around the world, including management teams at forward-thinking companies like Microsoft, Dell, Intel, Hewlett-Packard and Symantec.

Predicting the Future research is ideal for strategy development and business technology planning. Its primary goal is to provide managers with information that is not available in

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the press about critical computer and telecommunications issues, trends and events. We're pleased to offer this unique ongoing insight to our clients.

2.1.9 Analyst Access (Advisory Services)

An Info-Tech membership gives you on-demand access to the expertise of our entire team of analysts via phone or email.

Call services. Leverage the value included in your membership. Rely on our experienced Analysts for answers when you:

- Need to validate your decisions or discuss the best direction for an IT project
- Want assistance getting the buy-in from other members of your organization
- Require an objective third-party to answer your IT/management questions

You can talk to our analysts about any business/IT situation.

Your account manager works with you to understand your situation and the issues you would like addressed throughout the year. For each call or email interaction, they will pair you with the Analyst who will be the most beneficial, knowledgeable and experienced based on your specific circumstances. Your analyst will continue to monitor your progress and touch base with you throughout the duration of your project to ensure that you are getting the results you expect.

Member access includes the following:

1. Telephone consultations with our analysts (on-demand)
2. Email interactions with an analyst concerning your IT, business and/or strategy concerns

Note for Gold level members:

You membership also includes custom research in the form of 10 Enterprise Advisory Services (EAS) credits, described below.

Custom Services. Go beyond your membership. Tap into Info-Tech's expertise to help you do the work:

Members seeking help to build documentation or discover custom answers beyond a call or e-mail can purchase and redeem EAS credits. Our research team will apply the methodologies we use in producing our research to create custom deliverables based on your specific needs, including:

- **Vendor shortlists**, including vendor briefings, market awareness, and secondary research.
- **Practices discovery.** We can work with a client and its peers (as defined by criteria the client supplies) to discover staffing, salary, organizational, and budget benchmarks as well as common and best practices.
- **RFP/RFI/RFQ creation.** We modify (or create) standardized templates by customizing them with our guidance as to specifics of a desired technology strategy (e.g. Virtualization).

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- **Document review and commentary**, including strategies, policies, RFPs, vendor responses to RFPs. We produce a written response highlighting changes needed and offering guidance and insight.
- **Benchmarking (MeasureIT) customization**. While MeasureIT provides clients with some tools to narrow their peer group, we can customize the reports to align with additional variables that the client specifies.

3 Consulting Services

Info-Tech's Professional Consulting Services offer a practical approach to your complex IT and business issues. Our consultants have years of real-world experience and access to the expertise of our research analysts, creating a potent combination of analytical thinking and an extensive knowledge base.

A Wealth of Experience to Get You Results

Our team of professionals includes seasoned IT professionals and CIOs, experienced consultants that work closely with our world-class research staff to develop solutions that work for you.

Our consultants don't just work for you – they work WITH you

Some consultants work in a vacuum, focusing on the theory behind the issues. Info-Tech's consultants work side-by-side with you and your team, for a co-operative approach that delivers results and leaves you with the tools for continued success.

Our most common consulting engagements include:

1. IT Diagnostic

The purpose of an IT Diagnostic consulting engagement is to help identify key areas of risk and inefficiency and build an action plan to remediate. This engagement is also very useful in diagnosing root cause of IT issues.

- Identify gaps and risks
- Key mitigation strategies
- Create an action plan

2. Strategic IT Planning

The purpose of an IT Strategic Planning consulting engagement is to help identify and plan for mission- critical IT projects. It is very useful when completing annual resource and financial plans, improves the business / IT dialogue, and improves the overall visibility and success rate of IT projects.

- Document and analyze the gap in business requirements or IT infrastructure
- Create an action plan to close the gap

3. DRP/Business Continuity

The purpose of an Info-Tech Disaster Recovery Plan Business Continuity Planning consulting engagement is to help understand current processes and capabilities, create a process for mitigating and recovering from a variety of application outages, and ensure processes are in place to maintain the plan.

- Understand and mitigate infrastructure gaps
- Ensure recovery for critical applications
- Effectively maintain a recovery strategy

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4. Vendor Management

The Vendor Management consulting engagement helps plan and prepare the vendor selection process. This product will help evaluate vendors, proposals and contracts to make sure the result is the most competent and cost effective vendor for your organization.

- Prepare and plan the purchase
- Select the right vendor for your needs
- Negotiate contracts

5. Microsoft Licensing

The purpose of an Info-Tech Microsoft Licensing consulting engagement is to help clients make proper licensing decisions, minimize costs, and ensure compliance.

- Satisfy compliance and audit requirements
- Optimize your license strategy across your enterprise to ensure the most cost effective model
- Create a sustainable approach to MS software asset management

6. Security Testing

Info-Tech's security testing service allows clients to view their security posture from the hacker's perspective. Our reports provide clients with a fully functional snapshot of their current security posture.

- Identify vulnerabilities
- Validate effectiveness of safeguards
- Demonstrate existing risks and provide remediation strategies for improvement

Each Info-Tech Consulting Solution is unique. We deliver a consulting engagement that makes the most sense for your organization.

4 Service Details

4.1 Accessing Info-Tech Services

Our Services include an easy to administrate access model that will allow maximum access by IT team members. Each Research Member is assigned a username and password and receives a new user tour upon registration.

The Services are provided via the Web using, as a minimum, Internet Explorer 6 and Mozilla Firefox 2.x Web browsers for a Windows environment. All of our online downloads are available in MS Office formats, PDF or Zip files containing the same formats.

We have clients in a wide variety of locations and time zones, and we accommodate them based on the times that are common to our respective time zones. Our analysts work from 9:00 am to 5:00 pm Eastern Time for telephone consultations.

Analysts are available at their earliest opportunity, but due to the amount of preparation involved, a minimum of 24 hours lead time is required. Generally, if there are no travel complications, analysts are available within 2-3 business days of the request.

4.2 Dedicated Account Management

Your company will have a dedicated Senior Account Manager to manage service delivery to your enterprise on a regional and national level. You will also be assigned a customer service representative who can assist with research requests and site usage.

Your account manager and customer service representative are available from 08:00 a.m. to 5:00 p.m. (Eastern Time), Monday to Friday. Customer service is also available online using the Live Chat function of our website.

This dedicated service can be used to:

- Make account inquiries, including adding or deleting members on your account
- Obtain help locating specific research
- Gain assistance using all membership resources
- Book calls or consultations with research analysts

5 Recommended Services

5.1 Proposed Investment

TERM	Gold License
1 Year	\$34,900

Premium license open to 3 named users with extended access to IT Strategy and Leadership seats, including Advisory access to subject matter experts by phone or by email.

Feature/Service Comparison - Info-Tech Research Group IT Membership	
Access	Gold (3 named users)
<u>Application Silo</u>	✓
<u>Infrastructure Silo</u>	✓
<u>Tactical Toolsets</u>	✓
<u>World Class Operations</u>	✓
<u>MeasureIT</u>	✓
<u>Usage Reports On Demand</u>	✓
<u>Peer to Peer Networking</u>	✓
<u>Purchase Optimization</u>	✓
<u>Predicting the Future Reports</u>	✓
<u>IT Strategy and Leadership Silo</u>	✓
<u>Advisory Services (Analyst Access by Phone and Email)</u>	✓

Comments: This document represents a Quotation and is NOT an Invoice.
To activate your membership(s) as outlined in this proposal, please contact:
Karim Ben Sari
kbensari@infotech.com
1-888-670-8889 ext. 2762
(Outside North America: +1 519 432 3550)

We thank you and look forward to continuing to work with you and the rest of your organization.

6 Appendix A

Provided below is an overall assessment of the research available to your company. We have provided examples of topics covered, categorized by focus area (applications or infrastructure). Please note that this is not an exhaustive list and the topics evolve in accordance with our clients' needs and the rapidly changing IT landscape.

6.1 Online Research Topics

6.1.1 Applications

Applications Management & Governance

- Application Portfolio Management
- Project and Portfolio Management

Application/Web Development & Maintenance

- Methodologies, Environments, Tools & Techniques
- Planning & Design
- Development
- Maintenance
- Testing & Deployment

Collaboration & Productivity Applications

- Collaboration & Teamware
- Email & Messaging
- Office Products

Enterprise Applications

- Business Intelligence & Analytics
- CRM Suites
- Content and Document Management
- ERP
- Human Resource Applications
- Sales, Marketing, and Customer Service Applications

Systems Integration

- Application Integration
- Business Process, Workflow & Forms Automation
- Data Integration and Data Management

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6.1.2 Infrastructure

Desktop & Mobile Devices

- Desktop and Mobile Infrastructure
- Desktop Virtualization
- Peripherals

Enterprise Networks

- Enterprise LANs, WANs, & Wireless
- Network Carrier Services
- Remote & Mobile Connectivity

IT Service Management

- Availability & Performance Management
- Hardware & Software Asset Management
- Help/Service Desk (ITIL/ITSM)

Infrastructure Management and Governance

- Capacity Planning & Management
- Facilities
- Outsourcing/Shared & Managed Services
- Project and Portfolio Management

Risk Management

- Data Security
- Disaster Recovery Planning
- Network Security
- Security Management Technologies
- Security Policy & Process

Servers and Storage

- Enterprise Databases
- High Availability
- Server & Storage Virtualization
- Server Hardware
- Server Platforms/Operating Systems
- Storage

Voice & Video

- Telephony & VOIP
- Unified Communications
- Video

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6.1.3 IT Strategy & Leadership

Leadership & Performance Management

- IT Management & Leadership
- IT Staff Performance Management & Development
- Organizational Design

Risk Management

- Legislation, Regulation & Compliance
- Security & Business Continuity Planning

Service Delivery & Management

- IT as a Service Portfolio
- Project Management & Governance
- Vendor & Contract Management

Strategy & Governance

- Enterprise Architecture & Standards
- IT Strategy & Alignment

Value Creation & Measurement

- Financial Management
- IT Accountability
- IT Innovation
- Performance Measurement & Assessment
- Stakeholder Management & Business Value