#### Amendment 5

This Amendment 5 amends the Master Price Agreement between the Midwestern Higher Education Compact and Info-Tech Research Group Inc., Contract No.: MHEC-130214, dated February 20, 2013 (the "Agreement").

The parties agree to amend the Agreement as follows:

1. Section 5. Term shall be deleted in its entirety and replaced with the following:

5. **Term:** This Master Agreement will be formed upon execution by the Parties, and shall remain in effect, unless otherwise terminated pursuant to the terms of the Master Agreement until December 31, 2020.

Exhibit A Services Pricing Exhibit. Shall be deleted in its entirely and replaced with the following:

See attached Exhibit A – Services Overview and Pricing

Exhibit B Services Agreement - SA shall be deleted in its entirety and replaced with the following:

See attached Exhibit A – Services Overview and Pricing

Except as set forth above, the Master Price Agreement shall remain as stated. In the event of a conflict between the terms found elsewhere in the Master Agreement and this Amendment 5, this Amendment 5 shall control.

Midwestern Higher Education Commission

Signature

Susan He	egaard	
Name		

President	_
Title	

Var 10, 2020 -

Info-Tech Research Group Inc.

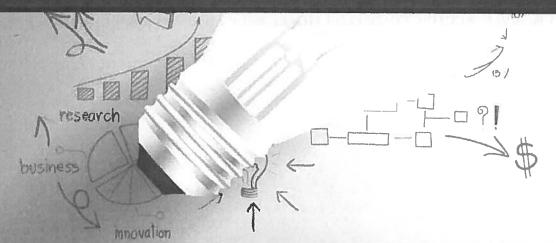
Signature

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JAN. 9, 2020

Date

# INFO~TECH



# MIDWESTERN HIGHER EDUCATION COMMISSION INFO-TECH RESEARCH GROUP PRODUCT AND SERVICES UPDATE DOCUMENT

# **JANUARY 7, 2019**

Info-Tech Research Group Inc. 3960 Howard Hughes Parkway, Suite 500 | Las Vegas, NV | 89169

Point of Contact: Chris Scott

E-Mail: cscott@infotech.com

Phone: 1-888-670-8889 Ext. 2819



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### VENDOR CONTACT INFORMATION - INFO-TECH RESEARCH GROUP INC.

Contractor's/Individual's Full Legal	
Name:	Info-Tech Research Group Inc.
Business Address:	3960 Howard Hughes Parkway, Suite 500 Las Vegas NV 89169
Contact Person's Name:	Chris Scott, Manager Bids & Contracts
Telephone Number:	1-888-670-8889 ex. 2819
Fax Number:	702-446-3782
Email Address:	cscott@infotech.com
Dunn and Bradstreet (D&B) Number and Credit Rating	079692602
Contractor's Website:	https://www.infotech.com

Please see the information listed within the table above for Info-Tech's Midwestern Higher Education Commission ("MHEC") Point of Contact. Chris has several years' experience working on bids and purchasing contracts for large US Government agencies and is able to provide clarification if required as per any aspect of Info-Tech's updated products and services. Please see the information listed above for Mr. Scott's contact information as well as pertinent information for Info-Tech Research Group Inc.



Chris Scott

#### **INFO-TECH COMPANY OVERVIEW AND RESEARCH & ADVISORY SERVICES**

Info-Tech's membership options provide tailored services for each role and member ensuring clients do not pay for services they are not using. Our desire is to exceed expectations in the execution of business value-aligned IT strategies, governance, project management, applications, infrastructure, security, business intelligence and various other IT related disciplines. We work with our clients as subject matter experts, developers, collaborators and partners connecting with individuals at their pace, not ours. We understand each working environment is unique and not one size fits all.

Info-Tech has a team of analysts in-house available to guide you in process improvement and project management on technical issues, not just strategic and management issues. These analysts are practitioners – they have been CISOs, CIOs, heads of infrastructure, etc. across their careers. We have much more of a specialist model because the bulk of the process improvement and project management issues on which we support you don't require frame breaking thought but do need to be informed by expertise.

We do lots of 'what' and 'why' research, but the bulk of our product focuses on 'how'. We have hundreds of blueprints that you and your team use to actually improve a process or deliver on a project. Other vendors frame a problem and provide case studies about how a few companies are tackling the problem and provide forecasting and trends – it's primarily an executive education product and they do that very well. But from there, you really are on your own to figure out how to get it done. By contrast, we build out the project road map for you, the communications tools, planning documents, templates, etc. that you need to actually do the project start in getting the project done. All of Info-Tech's research is based on a COBIT 5, CMMI, TOGAF, ITIL. That reduces the risk of project failure and delays dramatically, and gives the project leader a huge head, NIST, ISO, and DAMA DMBOK2 framework(s).

Our competencies include:

- Providing analyst advisory services that include both written and verbal consultations
- Assisting with vendor and technology sourcing support and selection decisions
- Market Research and date Based Software and Vendor Reviews and Rankings
- Supporting critical IT projects and implementations throughout the year
- Providing IT governance and process support and improvement advice
- Assisting senior management with organizational planning and strategy
- Providing a self-serving 24 hour resource of written research
- Providing benchmarking reports that include business alignment assessments
- Building business cases for key IT investments made throughout the year

Info-Tech uses several formats to effectively present our research including solution sets, project blueprints, tools, templates, analyst calls, webinars, videos, on-site strategy sessions, events, and workshops. Our focus is to help your organization navigate critical technology projects through a guided implementation. We move beyond reports with action-based research to drive sustainable IT improvement through innovative research.

We collaborate with clients through our Leadership Services to gain consensus on their priorities and develop/execute personalized plans for success. Our connections with clients focus on personalized development strategies to achieve their career goals. Leveraging Info-Tech's research and best practices, we provide consultative advisory services and executive coaching. Our regular interactions between our analysts and customers via analyst inquiries, vendor briefings, teleconferences, live events, and written inquiries result in our analysts being particularly well-versed in the desired public sector.

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We possess the largest knowledge base of advisory toolkits and implementation frameworks on the planet that are freely available to our clients – including business case templates, service costing and management frameworks, infrastructure and application reviews, vendor landscapes, the largest collection of TCO and maturity self-assessment tools, as well as workshop and facilitation tools for internal IT process improvement initiatives.

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All research is unlocked intellectual property meaning our clients can use the resources perpetually and share content within the organization to foster project completion.

Our independence from vendors of technology means we can be trusted to provide unbiased advice to clients, serving their interests, rather than our own.

Info-Tech Research Group provides an online web portal to our members which is available 24 hours per day, 7 days per week, 365 days per year. Within Info-Tech's portal are thousands upon thousands of research materials and resources to assist our members with all core IT projects and topical areas of concern.

The Blueprints and Resources published on Info-Tech's website are chosen based on market direction, client demand, and IT trends; non-sponsored, independent research. We offer over 700 do-it-yourself project and process Blueprints. In addition, we offer thousands of Trend Reports, Industry Notes, Reference Architectures, Toolkits, Software Reviews, Benchmarking Reports, IT Policy Templates, Toolkits, Case Studies, and Videos developed by our industry experts to help our members save time and money when it comes to tackling their most important IT initiatives.

All topics covered in the core Blueprints are organized under eight research silos:

- CIO
- Infrastructure & Operations
- Enterprise Architecture
- Applications
- Project & Portfolio Management
- Data & Business Intelligence
- Security
- Vendor Management

The research is then categorized based on further clarified sub sections. All written materials are also easily found via the search bar function based on extensive metadata and key words specific to topic, author, or title. Research is available in an unlimited fashion to all users through the 24/7 web-portal – www.infotech.com. Sample publications:

- Observe the Evolution of Quantum Capability
- <u>Combine Security Risk Management Components Into One Program</u>
- Own the Cloud: Strategy & Action Plan
- Position IT to Support and Be a Leader in Open Data Initiatives
- Assert IT's Relevance During Digital Transformations
- Modernize Your Microsoft Licensing for the Cloud Era
- <u>Explore the Secrets of Oracle Cloud Licensing</u>
- Explore the Secrets of IBM Software Contracts to Optimize Spend and Reduce Compliance Risk
- Lead a Digital Transformation to Advance Revenue Generation
- Develop a Plan to Pilot Enterprise Service Management

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Create a Customer-Centric Digital Strategy

- Ensure Meaningful Connections With Citizens Using New Interaction Channels
- Develop and Implement a Security Risk Management Program
- Embed Security Into the DevOps Pipeline
- <u>Architect Your Big Data Environment</u>
- Develop a Master Data Management Strategy and Roadmap to Better Monetize Data
- <u>Restore Trust in Your Data Using a Business-Aligned Data Quality Management Approach</u>

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- Go the Extra Mile With Blockchain
- <u>Redesign IT Governance to Drive Optimal Business Results</u>
- Design a Customer-Centric Digital Operating Model
- Succeed With Digital Strategy Execution
- Double Your Organization's Effectiveness With a Digital Twin
- <u>Take Control of Infrastructure Metrics</u>
- Use Application Metrics that Matter
- Develop Meaningful Service Metrics to Ensure Business and User Satisfaction
- Leverage Application Development Metrics to Gauge Process and Increase Success
- Implement Agile Practices that Work
- Optimize the IT Operations Center
- <u>CIO Trend Report 2019</u>

Info-Tech uses a number of formats to effectively present our research including solution sets, project blueprints, tools, templates, analyst calls, webinars and workshops. Our focus is to help your organization navigate critical technology projects through a guided implementation. We move beyond reports with action-based research to drive sustainable IT improvement through innovative research.

#### ANALYST CONSULTATION SERVICES

Info-Tech has over 300 Analysts available to guide IT Leaders through the research on the web-portal and discuss IT topics in more detail to ensure best practices are in place. MHEC members can initiate a call through the web-portal or by contacting their dedicated Account Management Team.

Info-Tech's analysts are not revenue driven but customer service driven and ultimately, customer focused. The only goal of our analysts is to provide the right advice when our clients need it in a tailored manner to best suit the specific needs of our member's particular environment.

Analyst calls can be requested through your dedicated Account Manager or directly on the member's library/home page. We offer a 24-hour turnaround for our Analyst Inquiry Service. Multiple staff can be on one call with Info-Tech's Expert Analysts and there are no limits to the number of follow-up calls on any given topic.

The vast majority of our analysts are available from 8AM to 5PM EST, which allows us to serve your team during your core business hours.

Our analysts are available to assist the IT Leaders and extended team members with the following:

- Information to validate or discuss the best direction for an IT project
- Assistance getting the buy-in from other members of your organization
- Provide an objective third-party to answer your IT/management questions
- Review of vendors being evaluated for a particular IT solution
- Guidance and direction for process improvements and program upgrades

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• Guided Implementation assistance for your major IT projects from beginning to end

Calls are typically booked for one-hour timeslots but it is important to keep in mind that Info-Tech has a focus on delivering value within our analyst interactions and does not determine a set limit on a particular topic. There is a focus on getting the appropriate solution with a combination of both analyst expertise as well as our written research that are supplemented with tools and templates instead of measuring time during a potentially critical advice related conversation with one of our analysts.

As a major component of Info-Tech's written research, our World Class Operations Framework Blueprints and Guided Implementations provide a detailed and step-by-step outline to optimize, implement and manage MHEC's member's core IT processes. Info-Tech's World Class Operations materials are based on a COBIT 5 and ITIL Framework and the processes outlined are extremely important to any Technology professional's job.

The published research is made up of process modules broken down into step-by-step plans to lead your members from the opening phase of the process such as assessments, current state analysis and corporate goal identification, all the way to the final and ideal state with the assistance of a formalized strategy roadmap, stakeholder buy-in strategy, a communication plan and final deliverables.

The most comprehensive aspect of Info-Tech's World Class Operations Frameworks and Guided Implementations is access to our expert analyst team. Through Info-Tech's proposed subscription, you will have the ability to book analyst calls to gain desired expertise on your most pressing technology concerns. These calls are one hour long in duration and the best way for Info-Tech to provide your members with tailored and extensive advice and direction in a one-one-one format.

Having all of the steps, procedures and tools & templates to help you get the job done and your processes optimized is one half of Info-Tech's focus. The second aspect is ensuring your members have access to analyst expertise via conversational means which Info-Tech sees as paramount in terms of specific and tailored advice to your organization's particular environment.

Through the Guided Implementation process, a series of calls will be administered between Info-Tech's subject matter expert of the particular topic of interest and the point of contact/project manager at MHEC. The first call will be a general scoping of the particular IT topic of interest. During that call, a tentative timetable will also be set for further calls as you move along the process of that particular technology's implementation guidelines (as set out in our Guided Implementation Blueprints on the website). The Guided Implementation process will be extremely advantageous for your members as the Implementation Blueprints accompanied by the analyst's on-going support ensures optimum process/project execution.

For every project you start, we have an expert analyst waiting to help you execute best practices and stay on schedule. It's on-demand project support when you need it the most. Each Guided Implementation conducted with our analysts saves our members an average of \$22,517 and 14 days of valuable IT resources.

#### **ON-SITE INFO-TECH SERVICES**

#### **ON-SITE WORKSHOP**

As a part of Info-Tech's membership product offerings, we will provide 4/5-day onsite workshops to MHEC members on technology topics of their choosing as needed.

Over the course of five days, our expert facilitators help you complete a key initiative, work through critical project deliverables, and train your team. We use a learning-based approach to implement Info-Tech methodologies tailored to your unique situation.

Why Workshops?

- Get 90% of any project done in five days: intense and focused days designed to collapse project timelines and make project decisions.
- Utilize our proven and road-tested methodologies to get your project done quickly and effectively.

**Proven Results:** 

- Since launching the products, Info-Tech has delivered over 200 onsite workshops with an overall satisfaction rating of 9.8/10.
- 96% of workshop participants rate the effectiveness of the expert facilitators at an 8 out of 10 or higher.
- On average, workshops save our members \$56,411 per five-day engagement.

#### **ON-SITE STRATEGY SESSIONS:**

As part of the membership features available to MHEC members, a CIO Counselor level license will include **Quarterly Onsite Visits.** Your Counselor will schedule monthly consultative sessions, be available for ad-hoc advice and come onsite up to four (4) times annually to focus on growing IT's contribution in your unique environment.

Discussion points include:

- Professional Development & Career Plans
- Facilitated Research Discussion
- Individual Executive & IT Brand Management
- Articulating IT's Contribution to the Business
- Organizational Design Setting IT Up for success

A different level of Counselor Seats proposed to MHEC members, will come a similar level of support in every aspect but instead of quarterly onsite visits, these seat licenses will provide two (2) onsite visits from the dedicated counselor per year.

With regards to a **Half-Day Workshop**, your Counselor will come onsite to deliver your choice of our most impactful research topics to be delivered as half-day condensed working sessions. Example topics include:

- IT Strategy Review
- Risk Assessment
- Stakeholder Management
- Project Portfolio Diagnostic

- Budget Planning Exercise
- Organizational Assessment
- Application Portfolio Assessment
- Infrastructure Strategy

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- Emerging Tech Landscape Analysis
- Custom Talk to Your Counselor

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#### **CAPABILITIES AND QUALIFICATIONS**

Info-Tech will provide MHEC members with access to Info-Tech Employees/personnel via two main avenues; Account management and Dedicated Research Analysts (Subject Matter Experts, Executive Advisors, Counselors, etc.). While Info-Tech Account Managers may well very for each MHEC member, please see below for a write up of the Account Manger's duties and how they will manage all MHEC IT Research and Advisory Info-Tech memberships:

Info-Tech will provide MHEC's members (license/seat holders) with an Account Manager who will be the main point of contact for all IT Research & Advisory service requirements.

These requirements include (but are not limited to):

Onboarding all new members via teleconference

 Creation and delivery of Key Initiative Plan to align Info-Tech resources to MHEC's user's specific requirements and needs based on role and upcoming technology projects

• Handle all basic service requests (adding/deleting of members, sending documents, answering all membership questions, sending of usage reports, renewal duties, etc.)

• Book advisory services for members such as Analyst Calls, Guided Implementation Calls, Workshop requests, contract review calls, data-driven diagnostic benchmarking programs, etc.

Scheduled touchpoint to ensure maximum usage by MHEC members

MHEC members Account Manager will be one dedicated person supported by a team. MHEC's users will also have access to Info-Tech's entire bench of Research Analysts and Subject Matter Experts to guide them through technology projects via their Advisory services access. It's important to note that while the Account Manager will be one dedicated person, MHEC will have access to hundreds of IT experts thought their account manager and membership subscription services.

All of these management services are included within the overall pricing and services offered to the MHEC. Please note it is Info-Tech's mission to ensure our services are used, not just read. We will work with your team tirelessly to ensure all named members get the absolute most out of their membership and drive year-over-year services to ensure that ongoing and dedicated support to project success and sustainability.

Info-Tech has self-serve options in terms of booking calls, diagnostic programs, requesting research, etc. on our site that MHEC members will all have access too. However, the dedicated Executive Advisory, Executive and CIO Counselors and account management team will have developed project and technology plans that will drive the membership services unique to the specific needs of the various members that will shape the research and project assistance over a 12 month span. Please see Key Initiative Plan sections for more pertinent information specific to the roles of the various members at MHEC.

The second grouping of personnel that MHEC members will have access to are Info-Tech's expert advisory staff. Please see a sampling of biographies below to showcase Info-Tech's exemplary bench strength in terms of subject matter experts and advisors MHEC members can expect to work closely with during the duration of any IT Research and Advisory membership:

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#### Dave Wallace is the former CIO at the City of Toronto.

Dave is now a Senior Research Director and Executive Advisor with Info-Tech Research Group. With over 36 years' IT experience in the public and private sectors, Dave has experience in all information management and technology domains and an expert level of knowledge in enterprise architecture, change management, project management, service management, and strategic planning.

Prior to joining Info-Tech, Dave served as the Executive Director at the Ontario Universities' Application Centre, where he provided executive and senior IT leadership to ensure that its new application management system was successfully implemented to meet the needs of all Ontario universities. As the first CIO of the University of Waterloo, Dave worked with IT teams from across the university campus to optimize how IT could help advance vital campus services, along with the development of an award winning student portal that continues to evolve today to meet student information and service needs. At the City of Toronto, as CIO, he provided senior leadership to transform the IT division and to help make the city's innovative 311 service one of the leading resident service management entities in the world. At Chartwell IRM (now part of KPMG), Dave served as Vice-President of the National Public Sector Program and led key initiatives with all three levels of government. As the first CTO and earlier as the Head Architect at the Government of Ontario, Dave led the development of a government-wide enterprise architecture and implemented effective IT governance by establishing its Architecture Review Board.

Dave received a Master of Business Administration from the University of Toronto and a Bachelor of Business Management from Ryerson University.

Andy Woyzbun is a Senior Executive Advisor with Info-Tech Research Group. Andy has over 40 years' experience in various technical, management and executive IT roles, including over 8 years with Info-Tech. He has worked in a broad variety of industries, including computer services, government, consulting services, financial services and telecommunications.

Andy has over 15 years of experience in executive roles. He gained deep experience in the business impact of technology during his tenure as executive in charge of lending services for Royal Trust, and as executive in charge of marketing, operations and systems for North American Trust. Before joining Info-Tech Research Group, Andy was Chief Information Officer for two organizations providing telecommunications services, AT&T Canada and C1 Communications, and for ADP Canada, a leading payroll and human resources services provider.

Andy has managed a variety of technical groups. He led the Management Consulting group for a major Canadian IT Consulting organization, Systemhouse, helping clients in a variety of lines of business with strategic planning and software and hardware selection. He also led the introduction of end-user computing, multi-company wide-area data networks, data administration, and large-scale PBX technology with a major Canadian financial institution, Royal Trust.

Andy has an Engineering degree and an MBA from the University of Toronto and a MS in Computer Science from Stanford University.

**Sidney Hodgson** is a Senior Executive Advisor at Info-Tech Research Group with over 30 years of experience in IT leadership roles as CIO of three organizations in Canada and the U.S., as well as international consulting experience in the U.S. and Asia. Sid has a breadth of knowledge in IT governance, project management, strategic and operational planning, enterprise architecture, business process reengineering, IT cost reduction, and IT turnaround management. Sid has worked in a variety of public and private sector industries, including transportation, agriculture, healthcare, highway construction, and higher education.

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Prior to joining Info-Tech, Sid was CIO and Assistant Commissioner with the Texas Higher Education Coordinating Board in Austin, Texas. Previously, Sid was CIO with the Canadian Red Cross and with Canada's Natural Sciences & Engineering Research Council (NSERC) and spent several years consulting and managing projects at state and international departments of transportation.

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Sid is a Montreal native and obtained his Bachelor of Commerce and MBA degrees at Concordia University in Montreal.

**Mark Tauschek** is the Vice President, Infrastructure Research Practice at Info-Tech Research Group. Previously, Mark was a Principal Consulting Analyst at Info-Tech and has been in the networking and telecommunications field for over 15 years.

Prior to joining the Info-Tech Research Group, Mark co-founded a wireless network professional services firm, Vokal Wireless, and acted as Principal Consultant providing wireless expertise to mid-sized organizations across all vertical markets. Mark has also held senior management positions at Azonic Networks Inc., AT&T Canada (MTS-Allstream), and Maxlink Communications Inc.

Mark has hands-on network design and deployment experience across verticals including healthcare, education, manufacturing, retail, and entertainment. He has extensive knowledge in the areas of technology research, process development, vendor selection, and project management. Specific expertise lies in wireless networking and mobile technologies.

Mark holds a MBA from the Richard Ivey School of Business at The University of Western Ontario, as well as a number of professional wireless technology certifications.

**Darin Stahl**, a Senior Research Director within the Infrastructure Practice, areas of focus include: Enterprise Infrastructure outsourcing (IaaS/PaaS, Managed Services and co-location), Disaster Recovery, Business Continuity, IT Infrastructure Operations Management, IT Operations Shared Services, Availability Management, Capacity Planning, non-commodity Server Infrastructure, Printer Management, Service Desk, Service Management and, IT Operations Budgeting.

Leveraging 30+ years of experience leading IT organizations in financial services and manufacturing, as well as the consultative interactions with Info-Tech's global client base, I provide day-to-day tactical as well as strategic advice. My goal is to marry deep, practical insight with the real-world issues faced by IT leaders.

Prior to joining Info-Tech Research Group, I led the IT and IS groups of a global manufacturing firm where I planned and executed corporate integration activities supporting the company's mergers and acquisitions.

Formerly, I was an IT leader for Royal & SunAlliance, a multi-national insurance company, managing all IT functions including strategic planning, mergers and acquisition support, and legacy application conversion.

My early career began at The Citigroup, a leading U.S. financial institution where I held various operational IT roles of increasing responsibility. Eventually, I progressed to lead the IT function for the Canadian subsidiary of the enterprise.

I have delivered presentations at industry conferences and events. I have also previously held certifications/designations such as CISA, RHCE and, MCSE.

Scott Bickley is a Senior Research Director at Info-Tech Research Group focused on Vendor Management and Contract Review. He also has experience in the areas of IT Asset Management (ITAM),

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Software Asset Management (SAM), and technology procurement along with a deep background in operations, engineering, and quality systems management.

At Info-Tech, Scott provides IT leaders with the guidance, analysis, and tools they need to ensure their technology contracts are thoroughly vetted, benchmarked, and optimized. He has worked with clients to effectively drive down purchase costs and negotiate mutually agreeable terms and conditions resulting in win-win vendor-customer relationships. He also assists clients in developing their approach to vendor management relations and software compliance defense actions, resulting in accountable partner relationships coupled with a defensible IT deployment environment. Prior to joining Info-Tech, Scott was responsible for the global software licensing and procurement at International Game Technology (IGT) and indirect procurement at Amazon.com.

Scott holds a B.S. in Justice Studies from Frostburg State University. He also holds active IAITAM certification designations of CSAM and CMAM and is a Certified Scrum Master (SCM).

**Barry Cousins** is a Senior Director at Info-Tech Research Group, specializing in Project Portfolio Management, Help/Service Desk, and Telephony/Unified Communications. He brings an extensive background in technology, IT management, and business leadership.

Prior to joining Info-Tech, Barry spent 12 years as CEO of Entry Software. In that role, Barry led the company's product development, professional services, and operations. He advised IT and business leaders on methodologies for managing teams, people, and their work with project management and help desk software. In that role, he worked with C-level executives to design dashboards and scorecards that visualize their investments in people.

Barry has an extensive background in working with business leaders who struggle with IT project throughput. He has devised and implemented strategies around right-sizing budgets, optimizing support services, centralizing work plans, prioritizing deliverables, and simplifying workflows. In 2008, he authored "One Task List", a business fable aimed at mid-market IT leaders looking to balance supply and demand.

Earlier in his career, Barry spent 15 years with Canada Trust (now TDCanadaTrust) as an Information Technologist. He focused on the development of new distribution channels, playing key roles in the company's industry leading Telephone and Internet Banking offerings.

Barry holds a Bachelor of Mathematics degree from the University of Waterloo.

Matt Burton is a Research Director at Info-Tech Research Group, specializing in Project Portfolio Management, Project Management, and Organizational Change Management. He brings over 10 years of experience in IT, primarily in Product Management and Project Management roles.

Matt joined Info-Tech in 2010, and has spent time producing IT research, managing strategic projects, developing sales operations, and most recently, managing and delivering Project and Portfolio Management research. Prior to joining Info-Tech, Matt held positions in organizations ranging from large enterprise to brand new start-ups. Matt worked in a variety of technical and business roles at StarTech.com, BlackBerry, the University of Lethbridge, and Bulbstorm.com.

Matt holds a Bachelor of Science degree in Computer Science from the University of Lethbridge, a Master of Science in Information Management from Arizona State University, and an MBA from Arizona State University.

**Aaron Shum** is a Practice Lead in the Security, Risk & Compliance team at Info-Tech Research Group. With 20+ years of experience across IT, InfoSec, and Data Privacy, he currently specializes in helping organizations implement comprehensive information security and cybersecurity programs, as well as comply with data privacy regulations such as the European Union's General Data Protection Regulation.

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Prior to joining Info-Tech Research Group, Aaron led the GDPR compliance efforts of a large multinational enterprise with over 80 locations spanning across 24 countries, including US, Canada, and various countries in Europe, Asia, and Australia. Holding the credentials of Certified Information Privacy Professional for Europe (CIPP/E), Certified Information Privacy Technologist (CIPT) and Certified Information Privacy Manager (CIPM), Aaron's practical experience include interpreting and applying the GDPR regulation across all different business functions, such as HR, IT, marketing, sales, etc.

Formerly, Aaron supported the growth of a multi-national technology company as their global head of IT, implementing a cloud transformation roadmap that included a fully unified communications platform, hybrid cloud infrastructure, and a DevOps applications provisioning, development, and deployment platform. During his almost 10-year tenure, he also developed an ISO-27001 compliant Information Security Management System and managed the company's security, governance, risk & compliance programs.

Aaron holds a Bachelor's degree in Computer Science from the University of Toronto, and is an ISO 27001 Lead Implementer and MCP, in addition to being a CIPP/E, CIPT and CIPM.

**Filipe De Souza** is a Senior Research Manager at Info-Tech Research Group within the Security, Risk, and Compliance Practice. Filipe provides CISOs and security managers with actionable research regarding their risk exposure, relevant threats, and potential solutions. His areas of security expertise include strategy and governance, security risk management, incident response, and vulnerability management. Filipe has facilitated numerous client engagements building security strategies and risk management programs across many verticals including local governments, manufacturing, and retail.

Filipe holds a Bachelor of Science with an Honours Specialization in Chemistry from Western University where he focused on computational modelling and molecular dynamics. He also holds a GIAC Security Essentials Certification (GSEC).

Jessica Ireland is the Director for the Security & Risk research team.

At Info-Tech Research Group, Jessica oversees the daily operations of the practice by managing multiple research projects and driving agenda planning around research topics, as well as strategizing with the team on how they can continue to serve the needs of Info-Tech clients. Additionally, she helps clients through advisory services and workshops. She provides guidance on requirements gathering and decision-making around security solutions such as Next-Generation Firewalls (NGFW), Identity and Access Management (IAM) products, and more. She has also assisted clients in developing documentation and strategy around managing security incidents, security policies, and the development of a security strategy. Prior to Info-Tech, Jessica was journalist and communications professional in London, ON.

She is a graduate of the Master of Arts in Journalism program at the University of Western Ontario, and also holds an Honours Specialization Bachelor of Arts in Political Science. Jessica is a certified Project Management Professional (PMP), which is an internationally recognized professional designation offered by the Project Management Institute (PMI).

**John Annand** is a Director in the Infrastructure team at Info-Tech Research Group. His work thus far has focused on refining the technology roadmapping process to ensure IT activities align to business needs as well as modernization projects in networking, storage, and the data center.

At Info-Tech, John's broad understanding across many IT domains have helped inform his research into the challenges that traditional organizations experience in the face of modern technologies such as cloud and software defined infrastructure. He has assisted clients in developing strategies to respond to the change and opportunities these converging technologies present. Prior to joining Info-Tech, John spent 18 years as a Sales Executive and Branch Manager in the VAR community, developing technical solutions and managed services targeted at the small enterprise. He also consulted for the Universities of Guelph

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and Waterloo on a variety of projects including VDI, high performance computing, and desktop management.

John attended the University of Guelph and holds various certifications from Microsoft, HP, CISCO, and VMWare.

**Cole Cioran** leads the Application Development and Portfolio Management practice at Info-Tech Research Group. Over the past twenty-five years, he has developed software; designed data, infrastructure, and software solutions; defined systems and enterprise architectures; delivered enterprisewide programs; and managed software development, infrastructure, and business systems analysis practices.

Cole has worked in the mobile, ERP, and financial services sectors. Prior to joining Info-Tech Cole was a Client Services Director at Blueprint Software Systems where he delivered enterprise software, practice development, and change management programs to over 50,000 people at over a dozen Fortune 50 companies. Prior to that Cole managed the Software Development, Infrastructure, and Systems Analysis practices at Mackenzie Investments where he increased productivity by 30%, on time delivery by 100%, and employee engagement by 25%.

These experiences have also made Cole realize that application development is about much more than software and hardware. Technology does not solve problems unless people, processes, tools, and organizations change as well. Beyond technical certifications such as Disciplined Agilist, TOGAF, and Business Resilience for IT, he is a certified change management professional. Cole also completed his Master of Arts in Leadership in 2015 with a study of complexity, motivation, and team building.

**Sandi Conrad** is a Senior Research Director for Info-Tech Research Group with extensive experience gained over the years in managing assets, auditing and optimizing licensing agreements, building documentation, improving service desks, and optimizing processes.

Prior to joining Info-Tech, Sandi ran her own consulting company delivering software and asset optimization services. She educated clients on best asset management practices, conducted gap analyses, and provided management consulting and software auditing services. During this time she also authored the Software Asset Management Starter Kit.

Sandi has worked in the past for Large Account Resellers (LAR), Systems Integrators, and Value Added Resellers (VAR), and was one of the first Software Contract Administrators in Canada. She has provided consulting services for hundreds of clients over the years, including IT asset acquisition and management strategies and service desk standardization and optimization.

Sandi is a certified software manager with SIIA, software practitioner with IBSMA, hardware asset management professional with IAITAM, is certified on Lean IT Foundations through Pink Elephant, and has held many process and technical sales certifications with various Software Publishers over the years. Sandi also holds a Graduate College Teaching Certificate from Fanshawe College.

**David Glazer** is a Practice Lead at Info-Tech Research Group, where he leads emerging trends, digital strategy, and enterprise architecture research.

David has previously worked as a foresight strategist at Idea Couture, one of the world's leading innovation consulting firms, and honed his analytical capabilities in the Government of Canada, where his reports reached all levels of government, including the Prime Minister's Office. David has also played a key role in bringing a number of high-tech and clean-tech ventures to market in Canada.

In 2013, David obtained his MBA in the Management of Technology and Innovation from Ryerson University in Toronto, a top 25 MBA program globally according to Bloomberg Business Week. David also has a certificate in Artificial Intelligence from MIT Sloan.

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**Paul Herzstein** is a Senior Workshop Director at Info-Tech Research Group with over 38 years of technology and management consulting experience, delivering a wide variety of advisory and consulting services focusing on achieving business objectives and implementing technology and business processes. Paul's background includes both technical and management expertise in program and project management, program IV&V (Independent Verification and Validation), IT Strategy, business process management and redesign, interim management, systems development methodology and delivery, systems requirements definition, solution evaluation and selection, business impact analysis and contingency planning as well implementation of technology solutions and operational processes.

Prior to joining Info-Tech, Paul worked for various consulting organizations including CGI, DMR, IBM and Coopers & Lybrand. He was responsible for a variety of projects providing solutions to the following business verticals: Financial Services both Insurance (Property & Casualty, Life) and Banking (Retail, Brokerage, Wealth); Manufacturing (Automotive, Food); Transportation; Health Care; Education; Government (Municipal / Regional / County, Provincial / State, Federal); Hotels; Utilities (Hydro, Gas); Retail; Distribution; and Real Estate.

Paul holds a Master of Business Administration from York University and a Bachelor's of Electrical Engineering from McGill University as well as several industry certifications including Certified Management Consultant (CMC) and Project Management Professional (PMP).

Andy Neill is Senior Research Director, Data Management and BI at Info-Tech Research Group. He has over 15 years of experience in managing technical teams, information architecture, data modelling, and enterprise data strategy. He is an expert in enterprise data architecture, data integration, data standards, data strategy, big data, and development of industry standard data models.

His responsibilities at ITRG include leading the data and analytics practice, guiding the future of research and client engagement in the data and analytics space.

As an analyst his responsibilities at Info-Tech include development of new research blueprints in the data management and BI area, leading client workshops, and guiding clients through research material and advisory calls.

Andy is also an instructor and course author for the University of Toronto in the field of Enterprise Architecture.

#### **DATA DRIVEN DIAGNOSTIC PROGRAMS**

Info-Tech's mission is to help clients tackle their key IT issues by enabling data-driven decision making with our consulting quality deliverables that are low effort and high impact. Our data-driven programs help justify IT spending to provide the most value to the organization as a whole by focusing on the end-user. Info-Tech's programs are the key to comprehensive, top-to-bottom alignment with the business.

Three important goals are achieved:

- 1. Increased transparency into and satisfaction with IT with clear performance metrics
- 2. Business support for IT projects aligned with business goals
- 3. Increased investment in IT resources

Info-Tech's <u>Diagnostic & Benchmarking</u> programs enable our members to collect the data they need to make key IT decisions. Info-Tech's proposal includes Diagnostic and Benchmarking Programs throughout the term of the contract targeted towards the IT Business Heads and Senior Leaders.

With data from over 45,000 business leaders, we understand what activities correlate with high IT performance and can help you successfully complete these activities in your own organization.

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The following sections highlight key diagnostic and benchmarking programs available to support IT Executives and CIOs.

<u>**CIO Business Vision**</u> – Stakeholder Management is a critical aspect of running a successful IT department. Info-Tech's CIO Business Vision program is a low effort, high impact program that will give you detailed report cards on the organization's satisfaction with IT's core services.

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Use these insights to understand your key business stakeholders, find out what is important to them, and improve your interactions. The CIO Business Vision survey is administered by our research team upon request. The valuable statistics you will receive from this survey range from Stakeholder satisfaction metrics, IT capacity metrics, and departmental metrics including stakeholder feedback reports. The value of this survey has five key points:

- 1. Plan your stakeholder strategy with Info-Tech
- 2. Build consensus & accountability within IT
- 3. Brief critical stakeholders within the Government
- 4. Build relationships with key decision-makers
- 5. Create company and business unit action plans

### Please review the following sample report: Sample Report - CIO Business Vision.pdf

The most important thing a CIO can do is understand the business needs and actively measure that the business is satisfied. Info-Tech's CIO Business Vision program allows our clients to do just that by receiving feedback on key IT functions.

<u>CEO-CIO Alignment Program</u> - I would encourage IT Leaders take advantage of this program at the beginning of the membership so we can effectively set up an engagement plan over the course of the year that will provide the most value to your department and the organization as a whole. For decades, IT-business alignment has been touted as the next dimension of effective IT. Yet many IT leaders are still without the tools they need to understand and support business priorities.

Decipher business needs by understanding the CEO's/Head of the Business's perspective. Automate ITbusiness alignment so IT can operate effectively and generate tangible value for your business.

As leader of an IT department, you recognize that your ideas, priorities, and perspectives differ from those of business leaders. This program eliminates the guesswork and starts closing the gaps between these perspectives.

By taking part in the CEO-CIO Alignment Program, you have already taken the first step to building ITbusiness alignment that optimizes IT and drives business value. This report shares insights from the survey component of our program. It will help your IT division:

- Understand the Business Head's perception of and vision for IT in your business
- · Identify and build core IT processes that automate IT-business alignment
- · Create a plan to address alignment gaps impeding business growth
- Deliver your plan to demonstrate IT value and progress

Please review the following sample report: Sample Report - CEO-CIO Alignment.pdf

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#### IT Management & Governance Diagnostic

Info-Tech's IT Management and Governance Diagnostic is a new innovative program available to MHEC members, which allows IT Executive's to understand their team's perception of the importance and effectiveness of their technology processes. Build consensus around which processes are important and ineffective by conducting an IT team alignment exercise.

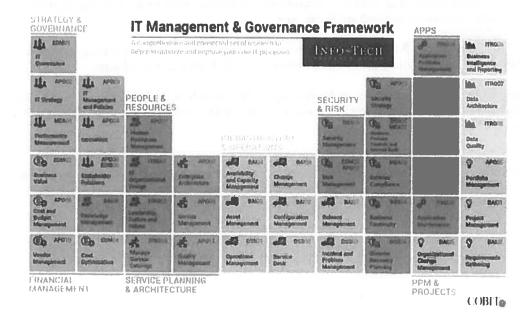
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The program enables the IT organization to create a customized process improvement roadmap to maximize impact and focus time and resources more efficiently and accurately.

There are 4 key steps that will guide you through the program to optimize your IT processes:

- Map Your Process Landscape Determine which processes your team believes need more attention so that you can effectively allocate your time and resources across all process initiatives. Understand what your next steps should be for each of the processes in your organization based on the feedback received from your entire team
- 2. Process Spotlight Dive deeper into each processes' performance. Highlight contentious areas and understand how aligned your team is for each process.
- 3. Team Alignment Use the results to facilitate a team alignment exercise with your team. Prioritize your team's process improvement efforts by getting opposing views on the table and reconciling the differences to build consensus.
- 4. Ownership & Accountability Assign process ownership and hold team members accountable for process improvement initiatives to ensure successful implementation and to realize the benefits from more effective processes.

Info-Tech uses a "heat-map" style graphic to identify the effectiveness and relative importance of each IT process. The processes below align with the COBIT 5 Framework of IT Processes



<u>IT Staffing Assessment</u> - Our comprehensive report shows you exactly where IT staff time is going and whether or not it's effectively driving results. Communicate how IT staff support the business and use included feedback from your staff to guide improvement exercises. Industry benchmarking is included. Please review the sample report: <u>Sample Report - IT Staffing Assessment.pdf</u>

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Benefits of completing Info-Tech's IT Staffing Assessment:

- 1. Staffing Benchmarking: see your staffing metrics at a glance and how they compare against your peers across over 4,000 organizations; use this data to determine whether you and your team are in line with industry benchmarks and how to course-correct
- 2. Time Breakdown by IT Function: assess staffing levels across 20 IT functions; compare staffing levels against business priorities to ensure alignment
- 3. Time Breakdown by Activity: evaluate resource time spent on high value vs. low value activities; establish targets by area and ensure your team has the support to get there
- 4. IT Function Effectiveness Assessments: get scorecard-based assessments of IT function effectiveness from both IT and the business

The above Executive benchmarking and diagnostic programs are typically run on an annual basis to measure performance year-over-year. Our clients regularly improve scores and make measurable action plans. We suggest running the above diagnostic and benchmarking programs towards the beginning of the membership to strategically align our services to meet the needs of your key business stakeholders.

Additional IT function diagnostic programs, to be utilized advantageously by MHEC members include:

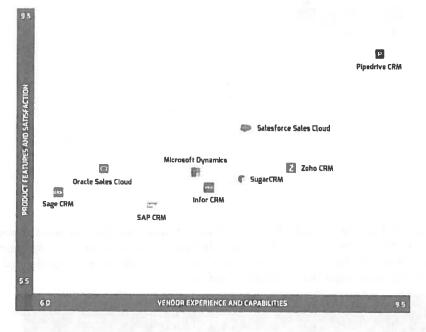
- <u>IT Security Diagnostic</u> The IT Security Diagnostic Program is a low effort, high impact program designed to help IT Security Leaders assess and improve their security practices. Gather and report on IT Security governance, business satisfaction, and effectiveness to understand where you stand and how you can improve.
- <u>Application Portfolio Assessment</u> Application portfolio management is nearly impossible to perform without an honest and thorough understanding of end user sentiment toward IT software. Develop data driven insights to help you decide which applications to retire, upgrade, re-train on or maintain, to meet the demands of the business.
- <u>End User Satisfaction</u> Service optimization is nearly impossible to perform without an honest and thorough understanding of end user sentiment toward IT services and software.
- <u>Data Quality Scorecard</u> Our comprehensive report shows you how the business feels about data quality and what the most pressing issues are. Use the feedback to guide improvement efforts and develop a focused action plan.
- <u>Project Portfolio Management Diagnostic Program</u> The Project Portfolio Management Diagnostic Program is a low effort, high impact program designed to help project owners assess and improve their PPM practices. Gather and report on all aspects of your PPM environment in order to understand where you stand and how you can improve.

#### Software Reviews Program and Vendor Landscapes

Info-Tech has a wide variety of customizable Vendor Landscape's<sup>TM</sup> and Data Quadrants currently available on our website to select the right solution provider for your needs by providing a holistic view of the top vendors and products in the market space. The vast majority of our Vendor Landscape<sup>TM</sup> toolkits are refreshed during our research cycle every 12 months or earlier depending on the technology. There are over 50 Vendor Landscape's<sup>TM</sup> and **thousands** of Software Reviews that MHEC can access with the subscription.

Included in the customizable Vendor Landscapes<sup>™</sup> is a vendor matrix whereby our clients can adjust the rankings of the vendors based on features and offerings that are most important to them. There is also an in-depth PowerPoint report that explains how the rankings of the vendors are broken down, a review of each vendor and solution involved in the VL as well as additional insight in terms of best practices with regards to the specific technology being considered. Our members find the Vendor Landscapes<sup>™</sup> to be extremely helpful in narrowing down their technology solution choices and making the decisions as easy and well thought out as possible.

Info-Tech also provides a best-in-breed Software Reviews Program - <u>https://www.infotech.com/software-reviews/</u> where actual end-users provide their feedback on software. We then prepare a report on technologies of a particular software (Ex. CRM) based on the real-end user feedback. This eliminates any bias towards a vendor and also provides real-time data to allow our clients to make informed business decisions based on peer reviews. Example Data Quadrant shown for CRM vendors.



Info-Tech offers Vendor Evaluations, Software Reviews, and Contract Reviews Services to help your IT leadership team select software and hardware vendors, maximize contract value, and ensure contract compliance.

The vendor evaluations and research is specific to industry as well. We have dedicated analysts to major industries including Government, to publish industry specific research and provide advice based on their

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previous work experience in that industry. Info-Tech has also published a Government Reference Architecture. Reference architectures built on years of industry expertise, honed by analysts working with real IT professionals in your industry. Leverage industry best practices so you don't waste time and money reinventing the wheel.

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Sample publications:

- How to Protect Your IT Budget in Government
- Political Acuity for CIOs: Your New Competency
- Moving from Business Value to Public Value
- Can I Trust You? Becoming a Trustworthy Public Sector IT Leader

Info-Tech also provides Government specific Reference Architecture which will provide MHEC members several specific Key Initiative Plans, not only based on their role but specific to their industry which will ensure maximum efficient usage of resources and help to guide priorities based on industry standards, best practices and Info-Tech's Government experienced analysts expertise and advice.

	Government Referer Architecture	nce
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As an added on-line research feature that MHEC members can take advantage of, our Government specific, Industry research can be customized per specific level of Government. See the graphic below which depicts how Info-Tech's Government Specific IT research can be filtered based upon the level of Government most important to MHEC members.





#### **INFO-TECH WEBSITE USAGE**

Members will have a unique username and password to access the content. Weekly e-mails will be sent to summarize new publications applicable to their role. Members can also customize their research feed to easily find new research by category, role, date, popularity, resource type, and keyword search. See screenshot below:

#### Customize Your Research Feed

FILTER BY ROLE				SORT BY	SEARCH WITHIN FILTERS
C.0	Enterpose Architecture	Project & Portfelio Management	Security	Date	
Infrastructure & Operations	A p casons	Cata & Bus ness interigence	verdar Menagement	Date	
MORE PILTERS					
e Elugants Job Description	ons Temoistes, Script	SSPOCES Mates Tools	Vendor Evaluations		

#### **Online Features:**

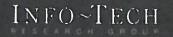
- Unique User Login Credentials
- Advanced Keyword Search
- Filter Content by Area and Type
- Content Preview
- Video Content Player
- Content Downloading
- Personal Library for Saved Research
- Training Course Enrollment
- Book Experiences
- Share Content with Peers
- Share Content on Social Media
- Customizable Account Settings

The home page also features key research applicable to your role and the ability to directly schedule appointments to explore research in further detail with the authors/analysts. It is our goal to provide the research most applicable to our members and ensure they have the support necessary to apply the resources to their current initiative.

See the following screenshot for a sample:

Comiline Information Recurity Alea Management Components into Dev Program	Modernize Your Microsoft Licensing for the Cloud Ere	Build a Security Awareness and Training Program	Develop and Deploy Security Policies
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New research is published weekly on the web-portal. Each IT team member will receive an update when research is published. This prompt ensures frequent usage of the subscription. Your dedicated Account Director and Executive Advisors will also schedule times with each member to review new research available so you receive consistent value from the subscription.

E-Mail preferences can be set to each user's preferences.

As per the sections outlined above, Info-Tech will provide MHEC members with home page features to customize and save research. Once logged in, members' home page will have a "my library" tab which will house all saved research in an organized format. Research can be saved directly from the landing page of the particular resource as each resource will present an option to "save to my homepage". Members will be able to save research and then house the research via the My Library tab based on date added, their specific role and IT topic. See screenshot below for an example:



So long as MHEC members are sharing the research within their organization, Info-Tech puts no limits on internal sharing if our resources within the MHEC member's organization, whether the person who is receiving the resources is a licensed member or not. Info-Tech believes strongly in multiple people having access to our research & advisory resources and materials as a driving force to overall organizational success.

#### Info-Tech Learning Academy

The Talent Leadership silo includes The Info-Tech Academy, which enables your staff to receive training in one of the 45 core IT processes (based on COBIT). 9 certificates are available by completing the outlined solution sets for each process. We understand that IT departments struggle to develop their staff. This is a unique opportunity to increase the utilization and value of an IT research service. Each topic is accompanied by live webinars and videos with our subject matter experts and IT members.

For example, the Data & BI Certificate includes the following courses:

- Business Intelligence & Reporting
- Data Architecture
- Data Quality

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The courses include a combination of videos, research, and activities. This is a great opportunity to the MHEC member's leadership teams to learn and develop but also train direct reports and colleagues more effectively in these areas. The access to the program is unlimited and unrestricted to all staff at the various MHEC member organizations. Each of the designated members can assign courses from the 45 core IT processes to their staff at any level as shown in the screenshot below.

Assign the Business Intelligence & Reporting Course	Course Information	
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d Favo - mjalovoj = TURT NAMI	Title: business, latelligence & renering 02 Number of Course Modules, 4 Estimated Time to Complete 2.2.4 Pours	
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	Phase One	Phase Two
	Understand the pasinese Comestum (B) Londscape	Function the Correct Reportion
Add New Cancel	Phase Three Crostic a 80 Gradinap for Continuous Improvement	

#### Info-Tech LIVE Events

MHEC's members will have access to our LIVE Events and in-person training programs offered throughout Canada and the United States. Info-Tech LIVE is the authoritative voice for IT executives making technology decisions and influencing institutional adoption. The event's strategically developed agenda is designed by practitioners to drive business value and technological transformation while focusing on real, everyday challenges through keynotes, case studies, workshops, and one-on-one analysis.

Sample agenda and topic areas:

- Day 1:
  - Keynote Address: 2019 Trends
  - GDPR What Now?
  - Keynote: Smart Government
  - Industry Roundtables (Including Government, Healthcare, and Education)
  - Awards Dinner (Optional)
- Day 2:
  - Keynote: Mark Anderson
  - Presentation Break-Outs: Blockchain, AI, Digital Twins, Robotic Process Automation, and Predicting the Future
  - Workshop Break-Outs CIO's, Infrastructure, Applications, and Security
  - Contract Negotiation Clinic
  - Evening Entertainment (Optional)
- Day 3:
  - Keynote: IT Management Study
  - IT Engagement (Member Panel)

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Management Playbooks are immersive, 5-day, role-specific training programs that focus on developing IT management practices to help you systematically improve your IT department. We cover four key IT disciplines - CIO, Applications, Infrastructure, and Security - with course delivery including both common elements as well as role-specific breakout sessions. Participants in each Playbook event will identify, discuss and understand the key metrics, initiatives, processes and time management practices required to run a top notch IT shop. You'll spend the week developing and completing an IT Management Playbook. Bring it back to your shop to immediately apply everything you've learned. All activities, scenarios and workshop exercises have been crafted to maximize the value of your time, and to unlock the power of collaborative learning from both our industry experts and your IT peers.

Session breakouts:

- Adopt an Integrated Leadership Mindset
  - Explore the foundations of a new leadership paradigm for the new world of work in all its complexity.

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- Optimize Talent Leadership Practices
  - Using the new leadership mindset, explore how organizational and demographic shifts are forcing us to rethink our old talent approaches.
- Drive Diversity and Inclusion
  - Examine the foundations of D&I and develop techniques for uncovering how companies create and capture value through inclusion.
- Engage Executives and the Board
  - Identify the skills that support effective client engagement and business partnering.
- Craft Your Leadership Brand
  - Building on the week's lessons, learn to articulate the strengths, values, and experiences that make you unique as a leader.

A schedule of upcoming events:

https://www.infotech.com/events

Info-Tech also hosts Webinars and Videos:

https://www.infotech.com/browse/webinars.

Videos are also released weekly to brief clients on latest trends and emerging tech. See example:

First-Ever GDPR Fines Offer Lessons in What to Avoid

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#### INFO-TECH CIO AND EXECUTIVE COUNSELOR MEMBERSHIP ADVISORY SERVICES

At a high level, Info-Tech's CIO Counselor membership will provide service levels consisting of those articulated within the service table further above in conjunction with, or further explained as, the following:

- Trusted Executive Concierge Service & Quarterly in-person onsite advisory sessions or "workshops"
- Understand & prepare for boardroom level challenges
- Full personalized Leadership Development Accelerator
- Pre-Scheduled & ad-hoc calls to move your agenda forward
- Leadership Development Program
- 360 degree Personal Evaluation & Coaching
- 90-Day "follow-me" Service

Info-Tech's CIO Counselor membership will provide MHEC member's IT Executives (CIO, Deputy CIO, etc.) with unparalleled support for IT leaders in larger, more complex organizations; the membership partners you with a seasoned IT executive with diverse It leadership experiences.

The highly personalized Counselor membership services will build an agenda to elevate and enhance your role through professional development and peer-to-peer networking, decision support and review, facilitated research discussions customized to your environment and personalized value plan in order to track goals.

In terms of the Leadership Development services available to MHEC members through Info-Tech's CIO Counselor membership, the following are included:

- 360 Degree Feedback Program get a holistic perspective on performance with a comprehensive competency evaluation from subordinates, peers and mangers
- Leadership Program for High Potentials This five-day leadership program is focused on improving decision-making and people-management skills for high-potential staff
- Executive Exchanges --Info-Tech best-effort basis to connect "like-minded" IT leaders based on specific areas of interest.

Info-Tech unique **"Follow Me" Service** will assist MHEC member's leadership as roles, jobs and responsibilities will change over the course of a career. Transition periods may be the most important time to have access to research, advisory and counselling services. Info-Tech will be there to provide support as you advance in your career. Should you change roles, jobs or even companies, we will be there to provide support in renewable 90 day increments, by your dedicated Counselor

With regards to the MHEC members' dedicated Counselor **Quarterly Onsite Visits**, your Counselor will schedule monthly consultative sessions, be available for ad-hoc advice and come onsite up to four (4) times annually to focus on growing IT's contribution in your unique environment.

Discussion points include:

- Professional Development & Career Plans
- Facilitated Research Discussion
- Individual Executive & IT Brand Management
- Articulating IT's Contribution to the Business
- Organizational Design Setting IT Up for success

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Executive Counselor Seats will come with the same level of support in every aspect but instead of quarterly onsite visits, these seats will provide two (2) onsite visits from the dedicated counselor per year.

MHEC members' Counselor will come onsite to deliver your choice of our most impactful research topics to be delivered as half-day condensed working sessions. Example topics include:

- **IT Strategy Review**
- **Risk Assessment** .

- Stakeholder Management •
- **Project Portfolio Diagnostic** .
- **Budget Planning Exercise** .

- Organizational Assessment .
- **Application Portfolio Assessment** .

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- . Infrastructure Strategy
- . **Emerging Tech Landscape Analysis**
- Custom Talk to Your Counselor

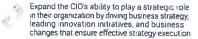
Custom Benchmarking is also available through this level of access for the MHEC member's Executives. Leverage our vast data base and member network by utilizing Info-Tech's diagnostic tools to get customized benchmark reporting that's tailored to your organization and delivered via your Counselor with insights on how to action the findings in your specific environment.

#### **COUNSELOR SEAT SERVICES**

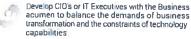
#### WHO IS INFO-TECH'S COUNSELOR SEAT FOR?

CIO's and IT Executives who want to move beyond an operational focus and drive greater business value within the organization A Counselor membership strengthens your ability to work with the C-Suite while growing your own leadership skills, as well as those of your team

#### **Benefits of your Counselor seat**



et al Discover opportunities, forging partnerships, and building cross-functional business teams that foster innovation



#### **Brief Overview of your Counselor Seats**

Quarterly or semi-annual in person Counselor visits	Strategic Personal Effectiveness Plan	
Counselor visits tailored to your needs and priorities	Rapid professional development geared to your goals and values	
1.1 Confidential Coaching Sessions	Customized to address	
Contextualized research to meet your priorities	and priorities	
Tailored executive level individual and team workshops	Designed to strengthen relationships, partnerships, and organizational alignment	
	Brand management tools	

association and perceived value to the organization Effective strateoic executive communication skills

to increase the positive

across the enterprise to drive unified cross-functional strategy and execution Lead cross-functional teams, engaging other C-Suite

50 leaders, influence to create a culture of innovation and continuous improvement

Influence and establish strong relationships with C-suite, or executive and functional leaders

Improve interpersonal and communication skills to enhance the use of your experience and emotional intelligence

Data supported practical Improved Business Value and actionable goals

CEO-CIO Alignment Diagnostics

fers.

Business Value, Stakeholder

Satisfaction Diagnostics 360 (CIO seats only)

Performance Feedback Program

Executive assessment on all your organizations Info-Tech engagements

ofIT

Fuse technology with business and functional strategy

Manage complex organizational change

Identify stakeholder issues earlier

Greater professional effectiveness and satisfaction

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# What outcomes can you expect? Benefits of your CIO Counselor seat

 Expand your ability to play a strategic role

Info-Tech Research Grau

- drive business strategy,
   Discover opportunities and lead innovation initiatives.
- ensure effective strategy execution
- Develop Business acumen • balance the demands of business transformation and the constraints of technology
- Create strong and enduring stakeholder relationships
   Improve your business and executive alignment
   Gain more from
  - strategic vendor and market, and community relationships

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Lead cross-functional teams

- engaging C-Suite leaders,
   Influence continuous
- improvement
- create a culture of innovation

Improve interpersonal and

- communication skills • Enhance your ability to leverage real-world experience
- Exploit your emotional intelligence.

## Counselor services help you lead with confidence

- Counselor visits tailored to your needs and priorities
  - 1. 1:1 coaching
  - 2. Contextualized research
  - 3. Tailored executive level workshops
- Personal Effectiveness Plan
  - 1. Professional development
  - 2. Addresses your needs and priorities
  - 3. Strengthens relationships and alignment
  - 4. Personal brand management
  - 5. Executive communication skills
- Data supported practical and actionable goals
  - 1. CEO-CIO Alignment
  - 2. Business Vision Stakeholder Management
  - 3. 360-Degree Performance Program
  - 4. Executive oversight of all Info-Tech engagements
  - Improve the business value of IT
    - Fuse technology with business and functional strategy
    - 2. Manage complex organizational change
    - 3. Identify stakeholder issues earlier
    - 4. Improved professional effectiveness

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Info-Tech IT Research and Advisory Services Midwestern Higher Education Commission Contract

# INFO~TECH



# What We're Hearing About Our Counselor Seat Product Line

"Provides the CIO with the insight and tools that drive value that matters most to the CEO, Board, and stakeholders"

"My CIO Counselor has helped me shape my leadership agenda and shift the conversation from IT as a cost center to IT as a contributor to the company's growth" "Enables the CIO to be a more effective executive leader, that helps the team improve relationships and your businesses customer experience"

"Help's CIO's become the strategic leader your organization needs!"

#### Learning Opportunities

Info-Tech provides an entire research silo related to Talent Leadership research specifically targeted to improve your organization's strategies on how to lead your IT team effectively. We provide proven resources that will help your IT leadership team become better managers.

Much like our information technology focused research, our Talent Leadership resources include Guided Implementations, Data Driven Diagnostic tools, Solution Sets and pre-written tools, templates and job descriptions all designed to ensure your IT department is a driving force for the overall business.

Our Advisors will help your team leverage the resources and provide executive coaching as part of your professional development goals.

The Talent Leadership silo also includes The Info-Tech Academy, which enables your staff to receive training in one of the 45 core IT processes (based on COBIT). 9 certificates are available by completing the outlined solution sets for each process. We understand that IT departments struggle to develop their staff. This is a unique opportunity to increase the utilization and value of an IT research service. Each topic is accompanied by webinars and videos with our subject matter experts and IT members.

For example, the Data & BI Certificate includes the following courses:

- Business Intelligence & Reporting
- Data Architecture
- Data Quality

The courses include a combination of videos, research, and activities. This is a great opportunity for the CIO/Executives to learn and develop but also train direct reports and colleagues more effectively in these areas. The access to the program is unlimited and unrestricted to all MHEC members.

Each of the designated members can assign courses from the 45 core IT processes (based on the COBIT framework) to their staff at any level.

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#### Industry Coverage & Software Reviews

As mentioned, the IT members have unlimited and unrestricted access to all content on the Info-Tech portal. In addition, MHEC members will have unlimited access to our 300 + Analysts and the dedicated support from an Advisor.

As part of our research coverage, Info-Tech provides an informed input to options regarding technologies, vendors, architectures, and other considerations.

Info-Tech has a wide variety of customizable Vendor Landscape's<sup>™</sup> and Data Quadrants currently available on our website to select the right solution provider for your needs by providing a holistic view of the top vendors and products in the market space. The vast majority of our Vendor Landscape<sup>™</sup> toolkits are refreshed during our research cycle every 12 months or earlier depending on the technology. There are over 50 Vendor Landscape's<sup>™</sup> and **thousands** of Software Reviews that MHEC members can access with the subscription.

Included in the customizable Vendor Landscapes<sup>™</sup> is a vendor matrix whereby our clients can adjust the rankings of the vendors based on features and offerings that are most important to them. There is also an in-depth PowerPoint report that explains how the rankings of the vendors are broken down, a review of each vendor and solution involved in the VL as well as additional insight in terms of best practices with regards to the specific technology being considered. Our members find the Vendor Landscapes<sup>™</sup> to be extremely helpful in narrowing down their technology solution choices and making the decisions as easy and well thought out as possible.

Info-Tech also provides a best-in-breed Software Reviews Program - <u>https://www.infotech.com/software-reviews/</u> where actual end-users provide their feedback on software. We then prepare a report on technologies of a particular software (Ex. CRM) based on the real-end user feedback. This eliminates any bias towards a vendor and also provides real-time data to allow our clients to make informed business decisions based on peer reviews.

Info-Tech offers Vendor Evaluations, Software Reviews, and Contract Reviews Services to help your IT leadership team select software and hardware vendors, maximize contract value, and ensure contract compliance.

The vendor evaluations and research is specific to industry as well. We have dedicated analysts to major industries including Government, to publish industry specific research and provide advice based on their previous work experience in that industry. Info-Tech has also published a Government Reference Architecture. Reference architectures built on years of industry expertise, honed by analysts working with real IT professionals in your industry. Leverage industry best practices so you don't waste time and money reinventing the wheel.

Please note, MHEC Members will have access to industry specific coverage and software reviews.

Sample publications:

- How to Protect Your IT Budget in Government
- Political Acuity for CIOs: Your New Competency
- Moving from Business Value to Public Value
- Can I Trust You? Becoming a Trustworthy Public Sector IT Leader

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#### Facilitated Peer-to-Peer Exchange

Info-Tech also offers an **Executive Exchange** program where our Analysts, the CIO and Executive Counselor and your dedicated Executive Advisor will help facilitate peer-to-peer meetings both in-person and over the phone. We feel this is the best way to engage networking for our members. We feel that our ability to connect our members through Executive Peer Exchanges and through our hosted events provides excellent opportunities for Executives to connect to our 3,000 + clients and extended Government and US Federal industry connections.

Our in-person events and management training sessions are also great networking opportunities for MHEC members and their IT staff.

Info-Tech Research Group's CIO and Executive Counselor Licenses provide the privileged access to an Executive Partner ("Counselor") who has deep domain knowledge and focuses 100% of their time on ensuring client value throughout the term of the subscription. Your Counselor will schedule monthly advisory sessions, be available on-demand for when you and your delegates need advice and counsel. Four full 'one-day' on-site strategy meetings are included at your location. Typically, these full-day sessions are delivered on a quarterly basis.

Coaching topics include:

- Professional Development and Career Advice
- Team, Department, and Executive Leadership
- Individual Executive and IT Brand Management

The Counselor program will be supported by our CIO and Government-focused analysts to support key functions such as digital transformations, IT strategy, governance, and people management. See sample analyst biographies below of advisors your Executives may work with 1:1 during the term of the contract.

#### **Analyst Inquiry or Question and Answer Services**

Info-Tech has over 300 Analysts available to guide IT Leaders through the research on the web-portal and discuss IT topics in more detail to ensure best practices are in place. MHEC members can initiate a call through the web-portal or by contacting their dedicated Account Management Team.

Info-Tech's analysts are not revenue driven but customer service driven and ultimately, customer focused. The only goal of our analysts is to provide the right advice when our clients need it in a tailored manner to best suit the specific needs of our member's particular environment.

Analyst calls can be requested through your dedicated Account Manager or directly on the member's library/home page. We offer a 24-hour turnaround for our Analyst Inquiry Service. Multiple staff can be on one call with Info-Tech's Expert Analysts and there are no limits to the number of follow-up calls on any given topic.

The vast majority of our analysts are available from 8AM to 5PM EST, which allows us to serve your team during your core business hours.

Our analysts are available to assist the IT Leaders and extended team members with the following:

- Information to validate or discuss the best direction for an IT project
- Assistance getting the buy-in from other members of your organization
- Provide an objective third-party to answer your IT/management questions

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- Review of vendors being evaluated for a particular IT solution
- Guidance and direction for process improvements and program upgrades
- Guided Implementation assistance for your major IT projects from beginning to end

Calls are typically booked for one-hour timeslots but it is important to keep in mind that Info-Tech has a focus on delivering value within our analyst interactions and does not determine a set limit on a particular topic. There is a focus on getting the appropriate solution with a combination of both analyst expertise as well as our written research that are supplemented with tools and templates instead of measuring time during a potentially critical advice related conversation with one of our analysts.

As a major component of Info-Tech's written research, our World Class Operations Framework Blueprints and Guided Implementations provide a detailed and step-by-step outline to optimize, implement and manage MHEC's core IT processes. Info-Tech's World Class Operations materials are based on a COBIT 5 and ITIL Framework and the processes outlined are extremely important to any Senior Technology department head's job.

The published research is made up of process modules broken down into step-by-step plans to lead your members from the opening phase of the process such as assessments, current state analysis and corporate goal identification, all the way to the final and ideal state with the assistance of a formalized strategy roadmap, stakeholder buy-in strategy, a communication plan and final deliverables.

The most comprehensive aspect of Info-Tech's World Class Operations Frameworks and Guided Implementations is access to our expert analyst team. Through Info-Tech's proposed subscription, you will have the ability to book analyst calls to gain desired expertise on your most pressing technology concerns. These calls are one hour long in duration and the best way for Info-Tech to provide your members with tailored and extensive advice and direction in a one-one-one format.

Having all of the steps, procedures and tools & templates to help you get the job done and your processes optimized is one half of Info-Tech's focus. The second aspect is ensuring your members have access to analyst expertise via conversational means which Info-Tech sees as paramount in terms of specific and tailored advice to your organization's particular environment.

Through the Guided Implementation process, a series of calls will be administered between Info-Tech's subject matter expert of the particular topic of interest and the point of contact/project manager at the MHEC agency. MHEC members' first call will be a general scoping of the particular IT topic of interest. During that call, a tentative timetable will also be set for further calls as you move along the process of that particular technology's implementation guidelines (as set out in our Guided Implementation Blueprints on the website). The Guided Implementation process will be extremely advantageous for your members as the Implementation Blueprints accompanied by the analyst's on-going support ensures optimum process/project execution.

For every project you start, we have an expert analyst waiting to help you execute best practices and stay on schedule. It's on-demand project support when you need it the most. Each Guided Implementation conducted with our analysts saves our members an average of \$22,517 and 14 days of valuable IT resources.

MHEC members will be assigned a dedicated Executive Advisor from the Research and Consulting Practice that will help shape the engagement plan and have regularly scheduled calls to complete a Key Initiative Plan. The Executive Advisor will be a senior member of our research practice with 15 + years of experience applicable to the member's role.

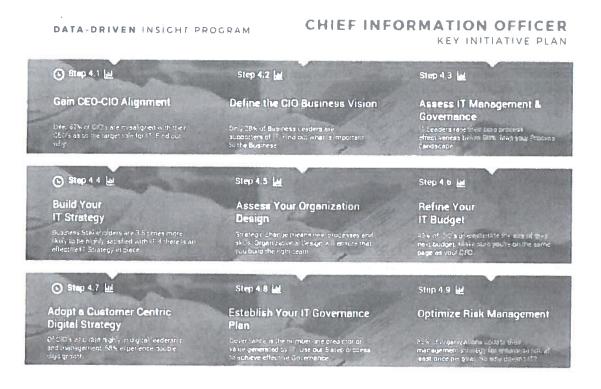
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The Executive Advisor will have previous experience specific to your role (ex. CISO, Enterprise Architect, Director of Analytics, Head of Infrastructure, etc.). The Executive Advisor will develop a deep understanding of MHEC's member and his/her key issues, and the leader will develop a trust in the views of the partner. As a result of this partnership, decisions can be made more confidently and actions can be taken to resolve issues.

Info-Tech's professional services practice is unique in that it blends the knowledge and experience of a research firm, with the methodology and proven delivery capabilities of a large consultancy, while maintaining the flexibility and effective pricing of a smaller organization. Additionally, because we are a research organization, our ongoing coverage of the complete range of IT solutions means we have a view to the future and can help your organization in understanding not only its current needs, but its future ones as well. Info-Tech uses COBIT and ITIL as a standard IT framework.

Get support for your IT leadership team. Our Roadmaps help you build and manage core IT functions to systematically improve performance. Each Roadmap includes a series of diagnostics to help you assess strengths and weaknesses of your current state as well as help you envision your target. We provide you with tools and training to help you succeed at key projects that are proven to enhance your department's capability and drive increased business satisfaction. Step-by-step initiatives ensure that your IT leadership team has a plan in place for creating real improvement over the course of your membership.

The dedicated Executive Advisors and extended analyst team will work with your IT team to focus attention on key projects and initiatives most important to MHEC members. See sample engagement plans below for core IT roles.



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#### DATA-DRIVEN INSIGHT PROGRAM

#### INFRASTRUCTURE KEY INITIATIVE PLAN

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# Step 4 Int

#### Assess your Core infrastructure

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#### Extend the Service Desk

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#### Build your Infrastructure Roadmap

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Step 8 M

Step 2 14

Step 5 IN

Development

Optimize Operations Monagement Interfacement of the rest Integration SLA management of

# Step 9 M

Build a Business Continuity 伊福川 Sec. 477 - 04 ery compliance. United y doing what a right for p 1 Acres 1

Create an Effective Disaster Recovery Plan But set stating actives are set school gradient processes

#### DATA-DRIVEN INSIGHT PROGRAM

#### APPLICATIONS KEY INITIATIVE PLAN

Step 1 4 **Assess Your App Portfolio** 

72% of organizations do not have a full understanding of their approximation postfold

Define Your App Strategy & Roadmap

bits of organizations believe that modeliniting their epsilizations fondscape a strates to not every busings objectives

Step 3 La

Step 6 La

**Optimize Your Requirements** Gathering Process

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### G Step 4 L

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Strategy

Govern & Manage a Software Implementation

On evening 66% of large Sniv project electro budget 33% are over time, and deferry 17% lean value than originally projected.

Build an App Maintenance

50% of a imantenance is reactive. Ostablish a ousness aligned yies for mantaining the most important applica atyour environment.

Step 8 🕍 Establish an Apps Center of Excellence

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**Optimize Application** 

55% of expendences rate velless then hell the benefics from their EBP multiplementations. Mere sate yeal have a program bodish benefits realization post go films.

Step 9 🕍 Adopt Business Process Management

Embed Quality in your

**Development Processes** 

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### VENDOR DATA-DRIVEN INSIGHT PROCHAM KEY INFLIATIVE PLAN 01 1 Masimiza the Value of Vendor Relation shows Esta Vender Man ATT INC INCOME THOP T WE Proactively Identify and Mitigete Master C wheet Review for See. Stop 5 Con't Allew Software Licensing b Denil Yose M&A Veur Centhori Inn Annotath Improv 4/+1

#### DATA DRIVEN INSIGHT PROGRAM

Make it easier to measure success from your projects

#### PORTFOLIO REVINITIATIVE PLAN

Despite the movement towards Age, customers stall think about the threeconstraints mode of time, cost and s

and him and the

() Thep 1 Lat	Step 2 🔛	Step 3 44
Assess PPM Current State	Assess Your Project Portfolio	Build a PPM Strategy
Only 51% of project hours are spent productively. Find out how your organization compares and what actions to take next	4 This of degenerating have an unmenageable list of projects in they backlog. Start this year web a realistic, active/gb/g plan	Only 49% of the planned project work a being delivered each year. It's time to improve both planning and execution
Step 4 4	Step 9 Lui	Step 6 🔝
Assess Your Project Management	Create Project Management Success	Adopt OCM Bast Practices
On time. On budget Wahin scops: High quality. Happy sponsors. Happy teams Project Management has a lot of moving parts you reed to manage	Drgthild with and only 58% bet shed with the quality of their project results. Establish a plan to implicave this	Orgenizational Change Management onsures successful deployment and adoption, put few orgenizations make someone accountation for DCM
	And and a second s	
🕲 8tap 7 🕍	Step 8 🔟	Step 9 🕍
Establish a Benefits Realization Process	Opti <b>mize Resource</b> Management	Build a Customer Satisfaction Report

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Two thirds of IT project tasks could be better skills-matched

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### DATA-DRIVEN INSIGHT PROCRAM

### SECURITY KEY INITIATIVE PLAN



### **Document and Contract Review**

Info-Tech also offers a program called **Purchase Optimization**. This service is very popular with our clients as they are able to send our analysts their particular contracts and documents (Microsoft, SAN Storage, Data Center Co-location, Enterprise Networks etc.) for us to review. This process includes an initial review of the contract by our analysts and then a call, similar to an advisory call with the analyst that reviewed the document. Document Reviews also include Business Cases, Business/IT Policies, Strategic Plans, EA Frameworks, RFP's, Job Descriptions, etc. MHEC's members will have access to Info-Tech's Purchase Optimization program.

Info-Tech does not place a page limit on document reviews or a limit on the number of document reviews completed during the term of a membership. Through this call our analyst is able to provide you with tailored insight for potential savings, compliance issues, appropriate feature options and general best practice tips for your contract negotiation process. A summarized document will be provided.

Info-Tech has a team of analysts in-house available to guide you in process improvement and project management on technical issues, not just strategic and management issues. These analysts are practitioners – they have been CISOs, CIOs, heads of infrastructure, etc. across their careers. We have much more of a specialist model because the bulk of the process improvement and project management issues on which we support you do not require frame-breaking thought, but do need to be informed by expertise.

Info-Tech has over 300 Analysts available to guide members through the research on the web-portal and discuss IT topics in more detail to ensure best practices are in place. Analysts are available to speak on any of the topic areas published on the Info-Tech web-portal.

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Info-Tech's mission is to help clients tackle their key IT issues by enabling data-driven decision making with our consulting quality deliverables that are low effort and high impact. Our data-driven programs help justify IT spending to provide the most value to the organization as a whole by focusing on the end-user. Info-Tech's programs are the key to comprehensive, top-to-bottom alignment with the business.

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Three important goals are achieved:

- 4. Increased transparency into and satisfaction with IT with clear performance metrics
- 5. Business support for IT projects aligned with business goals
- 6. Increased investment in IT resources

Info-Tech's <u>Diagnostic & Benchmarking</u> programs enable our members to collect the data they need to make key IT decisions. Info-Tech's proposal includes Diagnostic and Benchmarking Programs throughout the term of the contract targeted towards the IT Business Heads and Senior Leaders.

With data from over 45,000 business leaders, we understand what activities correlate with high IT performance and can help you successfully complete these activities in your own organization.

The following sections highlight key diagnostic and benchmarking programs available to support IT Executives and CIOs.

<u>**CIO Business Vision**</u> – Stakeholder Management is a critical aspect of running a successful 1T department. Info-Tech's CIO Business Vision program is a low effort, high impact program that will give you detailed report cards on the organization's satisfaction with IT's core services.

Use these insights to understand your key business stakeholders, find out what is important to them, and improve your interactions. The CIO Business Vision survey is administered by our research team upon request. The valuable statistics you will receive from this survey range from Stakeholder satisfaction metrics, IT capacity metrics, and departmental metrics including stakeholder feedback reports. The value of this survey has five key points:

- 6. Plan your stakeholder strategy with Info-Tech
- 7. Build consensus & accountability within IT
- 8. Brief critical stakeholders within the Government
- 9. Build relationships with key decision-makers
- 10. Create company and business unit action plans

Please review the following sample report: Sample Report - CIO Business Vision.pdf

The most important thing a CIO can do is understand the business needs and actively measure that the business is satisfied. Info-Tech's CIO Business Vision program allows our clients to do just that by receiving feedback on key IT functions.

**CEO-CIO Alignment Program** - I would encourage IT Leaders take advantage of this program at the beginning of the membership so we can effectively set up an engagement plan over the course of the year that will provide the most value to your department and the organization as a whole. For decades, IT-business alignment has been touted as the next dimension of effective IT. Yet many IT leaders are still without the tools they need to understand and support business priorities.

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Decipher business needs by understanding the CEO's/Head of the Business's perspective. Automate ITbusiness alignment so IT can operate effectively and generate tangible value for your business.

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As leader of an IT department, you recognize that your ideas, priorities, and perspectives differ from those of business leaders. This program eliminates the guesswork and starts closing the gaps between these perspectives.

By taking part in the CEO-CIO Alignment Program, you have already taken the first step to building ITbusiness alignment that optimizes IT and drives business value. This report shares insights from the survey component of our program. It will help your IT division:

- Understand the Business Head's perception of and vision for IT in your business
- Identify and build core IT processes that automate IT-business alignment
- Create a plan to address alignment gaps impeding business growth
- Deliver your plan to demonstrate IT value and progress

Please review the following sample report: Sample Report - CEO-CIO Alignment.pdf

## IT Management & Governance Diagnostic

Info-Tech's IT Management and Governance Diagnostic is a new innovative program available to MHEC members, which allows IT Executive's to understand their team's perception of the importance and effectiveness of their technology processes. Build consensus around which processes are important and ineffective by conducting an IT team alignment exercise.

The program enables the IT organization to create a customized process improvement roadmap to maximize impact and focus time and resources more efficiently and accurately.

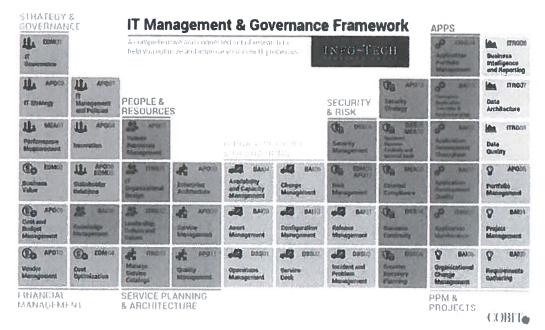
There are 4 key steps that will guide you through the program to optimize your IT processes:

- 5. Map Your Process Landscape Determine which processes your team believes need more attention so that you can effectively allocate your time and resources across all process initiatives. Understand what your next steps should be for each of the processes in your organization based on the feedback received from your entire team
- 6. Process Spotlight Dive deeper into each processes' performance. Highlight contentious areas and understand how aligned your team is for each process.
- 7. Team Alignment Use the results to facilitate a team alignment exercise with your team. Prioritize your team's process improvement efforts by getting opposing views on the table and reconciling the differences to build consensus.
- 8. Ownership & Accountability Assign process ownership and hold team members accountable for process improvement initiatives to ensure successful implementation and to realize the benefits from more effective processes.

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Info-Tech uses a "heat-map" style graphic to identify the effectiveness and relative importance of each IT process. The processes below align with the COBIT 5 Framework of IT Processes.

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<u>IT Staffing Assessment</u> - Our comprehensive report shows you exactly where IT staff time is going and whether or not it's effectively driving results. Communicate how IT staff support the business and use included feedback from your staff to guide improvement exercises. Industry benchmarking is included. Please review the sample report: <u>Sample Report - IT Staffing Assessment.pdf</u>

Benefits of completing Info-Tech's IT Staffing Assessment:

- 1. Staffing Benchmarking: see your staffing metrics at a glance and how they compare against your peers across over 4,000 organizations; use this data to determine whether you and your team are in line with industry benchmarks and how to course-correct
- 2. Time Breakdown by IT Function: assess staffing levels across 20 IT functions; compare staffing levels against business priorities to ensure alignment
- 3. Time Breakdown by Activity: evaluate resource time spent on high value vs. low value activities; establish targets by area and ensure your team has the support to get there
- 4. IT Function Effectiveness Assessments: get scorecard-based assessments of IT function effectiveness from both IT and the business

The above Executive benchmarking and diagnostic programs are typically run on an annual basis to measure performance year-over-year. Our clients regularly improve scores and make measurable action plans. We suggest running the above diagnostic and benchmarking programs towards the beginning of the membership to strategically align our services to meet the needs of your key business stakeholders.

Additional IT function diagnostic programs, to be utilized advantageously by MHEC members' include:

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- <u>IT Security Diagnostic</u> The IT Security Diagnostic Program is a low effort, high impact program designed to help IT Security Leaders assess and improve their security practices. Gather and report on IT Security governance, business satisfaction, and effectiveness to understand where you stand and how you can improve.
- <u>Application Portfolio Assessment</u> Application portfolio management is nearly impossible to perform without an honest and thorough understanding of end user sentiment toward IT software. Develop data driven insights to help you decide which applications to retire, upgrade, re-train on or maintain, to meet the demands of the business.
- <u>End User Satisfaction</u> Service optimization is nearly impossible to perform without an honest and thorough understanding of end user sentiment toward IT services and software.
- <u>Data Quality Scorecard</u> Our comprehensive report shows you how the business feels about data quality and what the most pressing issues are. Use the feedback to guide improvement efforts and develop a focused action plan.

<u>Project Portfolio Management Diagnostic Program</u> - The Project Portfolio Management Diagnostic Program is a low effort, high impact program designed to help project owners assess and improve their PPM practices. Gather and report on all aspects of your PPM environment in order to understand where you stand and how you can



Measure IT Stakeholder Satisfaction











IT Staffing Assessment

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End User Feedback







PMO Assessment

nt Application Feedback



Data Quality

Reporting and Analytics

Reporting and Analy



## **Conferences, Seminars and Related Events**

MHEC members will also have access to our LIVE Events and in-person training programs offered throughout Canada and the United States. Info-Tech LIVE is the authoritative voice for IT executives making technology decisions and influencing institutional adoption. The event's strategically developed agenda is designed by practitioners to drive business value and technological transformation while focusing on real, everyday challenges through keynotes, case studies, workshops, and one-on-one analysis.

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Sample agenda and topic areas:

- Day 1:
  - Keynote Address: 2019 Trends
  - GDPR What Now?
  - Keynote: Smart Government
  - Industry Roundtables (Including Government, Healthcare, and Education)
  - Awards Dinner (Optional)
- Day 2:
  - Keynote: Mark Anderson
  - Presentation Break-Outs: Blockchain, AI, Digital Twins, Robotic Process Automation, and Predicting the Future
  - Workshop Break-Outs CIO's, Infrastructure, Applications, and Security
  - Contract Negotiation Clinic
  - Evening Entertainment (Optional)
- Day 3:
  - Keynote: IT Management Study
  - IT Engagement (Member Panel)
  - Management Playbooks

Management Playbooks are immersive, 5-day, role-specific training programs that focus on developing IT management practices to help you systematically improve your IT department. We cover four key IT disciplines - CIO, Applications, Infrastructure, and Security - with course delivery including both common elements as well as role-specific breakout sessions. Participants in each Playbook event will identify, discuss and understand the key metrics, initiatives, processes and time management practices required to run a top notch IT shop. You'll spend the week developing and completing an IT Management Playbook. Bring it back to your shop to immediately apply everything you've learned. All activities, scenarios and workshop exercises have been crafted to maximize the value of your time, and to unlock the power of collaborative learning from both our industry experts and your IT peers.

Session breakouts:

- Adopt an Integrated Leadership Mindset
  - Explore the foundations of a new leadership paradigm for the new world of work in all its complexity.
- **Optimize Talent Leadership Practices** 
  - Using the new leadership mindset, explore how organizational and demographic shifts are forcing us to rethink our old talent approaches.
- Drive Diversity and Inclusion
  - Examine the foundations of D&I and develop techniques for uncovering how companies create and capture value through inclusion.

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- Engage Executives and the Board
  - Identify the skills that support effective client engagement and business partnering.
- Craft Your Leadership Brand
  - Building on the week's lessons, learn to articulate the strengths, values, and experiences that make you unique as a leader.

A schedule of upcoming events:

### https://www.infotech.com/events

Info-Tech also hosts Webinars and Videos:

## https://www.infotech.com/browse/webinars.

Videos are also released weekly to brief clients on latest trends and emerging tech.

## **Extended Analyst Access**

Info-Tech has over 300 <u>Analysts</u> (review link to see analyst biographies) available to guide IT Leaders through the research on the web-portal and discuss IT topics in more detail to ensure best practices are in place. Members can initiate a call through the web-portal or by contacting their dedicated Account Management Team.

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Info-Tech also offers an **Executive Exchange** program where our Analysts and your dedicated Counselor will help facilitate peer-to-peer meetings both in-person and over the phone. We feel this is the best way to engage networking for our members. Please note, we do not have an on-line peer networking program. We feel that our ability to connect our members through Executive Exchanges and through our hosted events provides excellent opportunities for Executives to connect to our 3,000 clients and extended industry connections. On-line services such as LinkedIn are primarily used by organizations to make informal on-line introductions.

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ielorExecutive CounselorCounselorLeadershiphipMembershipMembershipMembership50\$53,350\$37,830\$23,860	Includes all features of the Executive Membership PLUS       Includes all features of the Leadership Includes all to Includes all features of the Leadership Includes all to Dedicated Membership PLUS:       Includes all to Includes all features of the Leadership Includes all to Dedicated Membership PLUS:         Image: Service Membership PLUS:       Image: Service Membership PLUS:       Dedicated Temploy:         Image: Service Membership PLUS:       Image: Service Membership PLUS:       Image: Service Membership PLUS:       Dedicated Service Membership PLUS:         Image: Service Membership PLUS:       Image: Service Membership PLUS:       Image: Service Membership PLUS:       Image: Service Membership PLUS:         Image: Service Membership Publice       Image: Service Membership PLUS:       Image: Service Publice       Image: Service Publice         Image: Service Membership Publice       Image: Service Publice       Image: Service Publice       Image: Service Publice       Image: Service Publice         Image: Service Membership Publice       Image: Service Publice       Image: Service Publice       Image: Service Publice       Image: Service       Image: Ser	<ul> <li>C Leadership Development Program</li> <li>C Leadership Development Program</li> <li>C Lonimited Access to 300+ Research Analysts with deep subject matter expertise</li> <li>C Personal Evaluation &amp; Coaching</li> <li>C Your choice of 1 LNE Event or 1 Training Course (Transferable)</li> <li>C Full web research access</li> </ul>
CIO Counselor Membership \$92,150	<ul> <li>Includes all features of the CIO Signature Membership PLUS</li> <li>One week of on-site workshop assistance for your top strategic objectives</li> <li>4 Additional Onsite Analyst days</li> <li>Monthly follow Up &amp; execution assistance to ensure the success of your top objective</li> <li>Assistance with C-Suite influence</li> </ul>	<ul> <li>Clone and a sector of the secto</li></ul>

## Info-Tech's Advisory & Team Service Levels

Event Seat	\$3,783	Role based access to all research & project methodologies	Full web access	Info-Tech online e-learning	Academy access	<ul> <li>Info-Tech LIVE Event ticket, a hands-on collaborative conference</li> </ul>	for CIU's and IT leaders				
Premium Seat	\$5,723	Role based access to all research & project methodologies	Premium Technology & Industry	Coverage		<ul> <li>Info-Tech online e-learning Academy access</li> </ul>	5-day IT Leadership Development     Drorow Accord of 1 1 to Econt	trogram Access of a Live Event (transferable)			
Small Enterprise Advisory Membership	\$13,580	Dedicated Account Manager	Unlimited advisory engagements	<ul> <li>Access 300+ Research Analysts with deen subject matter exertise</li> </ul>		<ul> <li>Premium   echnology &amp; Industry Coverage</li> </ul>	<ul> <li>Unlimited Diagnostics</li> </ul>	Contract Revies Included	<ul> <li>Your choice of 1 LIVE Event or 1 Training Course</li> </ul>	For Qualifying Small Enterprises with 1-15 IT staff & revenue under 25 Million	
Advisory Seat – Add On	\$18,042	Premium Technology & Industry Coverage	<ul> <li>Software Reviews</li> </ul>	Unlimited Diagnostics	Dedicated Account Manager	<ul> <li>Unlimited advisory assistance</li> </ul>	Access 300+ Research Analysts with deep subject matter expertise		Your choice of 1 LIVE Event or 1 Training Course (Transferable)		

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or Bundle Iship Team		aat Quarterly On-site	Unlimited Remote Advisory Assistance	Role based access to all research & project methodologies	Solve your most pressing IT problem in one week	\$156,800	\$31,360	\$125,440	\$10,453
MLE Counselor Bundle 4 Seat IT Leadership Team	in species	1 Executive Counselor Seat Quarterly On-site	3 Advisory Seats	10 Team Seats	1 Workshop	List Price	17% Bundle Discount	Promotional Price	Monthly
u <b>ndle</b> dership Team	13 Onsite Analyst & Wortehops days included		Untimited Remote Advisory Assistance	Role based access to all research & project methodologies	Solve your most pressing IT problem in oneweek	\$196,800	\$39,360	\$157,440	\$13,120
CIO Bundle 4 Seat IT Leadership Team	1 CIO Counselor Seat		3 Advisory Seats	10 Team Seats	1 Workshop	List Price	17% Bundle Discount	Promotional Price	Monthly
e Bundle idership Team	13 Onsite Analyst & Workshops days Included	On-Site Advisory	Unlimited Remote Advisory Assistance	Role based access to all research & project methodologies	Solve your most pressing 17 problem in one week	\$363,000	\$72,600	\$290,400	\$24,200
<b>Enterprise Bundle</b> 9 Seat IT Leadership Team	1 CIO Counselor Seat	3 Counselor Seats	5 Advisory Seats	15 Team Seats	1 Workshop	List Price	17% Bundle Discount	Promotional Price	Monthly
<b>ise Bundle</b> ership Team	13 Onste Analys & Workstops days Induded	ats Quarterly On-site	Unlimited Remote Advisory Assistance	Role based access to all research & project methodologies	Solve your most pressing IT problem in one week	\$626,000	\$131,000	\$495,000	\$41,250
Global Enterprise Bundle 16 Seat IT Leadership Team	1 CIO Counselor Seat	5 Executive Counselor Seats Quarterly On-site	10 Advisory Seats	20 Team Seats	1 Workshop	List Price	17% Bundle Discount	Promotional Price	Monthly

## Medium/Large Bundles – Info-Tech Research Group

le /ML / Service		Unlimited Contract Review Service	Unlimited Remote Advisory Assistance		Solve your most pressing IT problem in one week	\$64,600	\$12,920	\$51,680	\$4,307
Basic Bundle /ML 2 Seat Advisory Service		1 Leadership Seat	1 Advisory Seat		1 Workshop	List Price	17% Bundle Discount	Promotional Price	Monthly
<b>undle /ML</b> y Service		Unlimited Contract Review Service	Unlimited Remote Advisory Assistance	Role based access to all research & project methodologies	Solve your most pressing IT problem in one week	\$95,200	\$19,040	\$76,160	\$6,347
Leadership Bundle /ML 3 Seat Advisory Service		1 Leadership Seat	2 Advisory Seats	5 Team Seats	1 Workshop	List Price	17% Bundle Discount	Promotional Price	Monthly
<b>3undie /ML</b> ite Service	On-sie Advisory		Uniimited Remote Advisory Assistance	Role based access to all research & project methodologies	Solve your most pressing IT problem in one week	\$119,200	\$23,840	\$95,360	\$7,947
Counselor Bundle /ML 3 Seat On Site Service	1 Counselor Seat		2 Advisory Seats	10 Team Seats	1 Workshop	List Price	17% Bundle Discount	Promotional Price	Monthly
<b>die /ML</b> Service	Quarterly Advi sory		Unlimited Remote Advisory Assistance	Role based access to all research & project methodologies	Solve your most pressing IT problem in one week	\$156,800	\$31,360	\$125,440	\$10,453
Executive Bundle /ML 4 Seat On-site Service	1 Executive Counselor Seat		3 Advisory Seats	10 Team Seats	1 Workshop	List Price	17% Bundle Discount	Promotional Price	Monthly

Group
Research
- Info-Tech
Bundles -
Enterprise
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<b>CIO Bundle /SE</b> 2 Seat Onsite Service	l <b>e /SE</b> · Service	<b>Workshop Bundle /SE</b> 2 Seat Advisory Service	i <b>dle /SE</b> Service	Advisory Bundle 2 Seat Advisory Service	<b>ndle</b> Service	Basic Bundle /SE 1 Seat Ádvisory Service	<b>ile /SE</b> y Service
1 Counselor Seat	Unlimited Contract Review						
1 SE Advisory Seat	Unlimited Remote Project Assistance	2 SE Advisory Seats	Unlimited Remote Project Assistance	2 SE Advisory Seats	Unlimited Remote Project Assistance	1 SE Advisory Seat	Unlimited Remote Project Assistance
3 Team Seats	Role based access to all research & project melhodologies	3 Team Seats	Role based access to all research & project methodologics			2 Team Seats	Role based access to all research & project methodologies
1 Workshop	Solve your most pressing IT problem in one week	1 Workshop	Solve your most pressing IT problem in one week				
List Price	\$79,200	List Price	\$57,200	List Price	\$28,000	List Price	\$18,800
20% Q1 Bundle Discount	\$15,840	20% Q1 Bundle Discount	\$11,440	20% Q1 Bundle Discount	\$5,600	20% Q1 Bundle Discount	\$3,760
Promotional Price	\$63,360	Promotional Price	\$45,760	Promotional Price	\$22,400	Promotional Price	\$15,040
Monthly	\$5,280	Monthly	\$3,813	Monthly	\$1,867	Monthly	\$1,253

ADDITIONAL INFO-TECH SER VICES

Onsite Workshops: Stand Alone Workshop: \$19,600 Membership Add-On Workshop: \$15,520 USD

Over the course of five days, our expert facilitators help you complete a key initiative. w ork through critical project deliverables, and train your team. We use a learning-based approach to implement hfo-Tech methodologies tailored to your unique situation "Travel and Expenses to be billed separately.

## An innovative approach to consulting. Your most pressing IT problems solved in one week.

## **Project Workshops**

A valuable way to plan your IT project implementations Let our experienced facilitators guide you through an innovative workshop held onsite at your location

## **Process Warkshops**

A dynamic w ay to enhance your core IT processes and build a w orld-class operation Engage your IT team onsite at your location in an innovative workshop

Example: Business Intelligence Vendor Selection

Day 5	Define Selection Tactics and Implementation	Develop vendor selection tactics and approach	Define the select and	Implement project	C reate use-case scenarios for vendor demos	Develop vendor demoscript Define hinte land	implementationstrategy	Define high-level implementationroadmap
Day 4	Formutze Venior Selection   Criteria	Solution architecture	Consolidate workshop's putcome & rationalize	requirements	Develop high-level solution architecture	Discuss requirements in the context of vendors' offerings	Refine requirements	Shortlistvendors
Day 3	Define Business Area Requirements	Discuss business Bi/ analytics challenges and	opportunities	Identify business needs	Map business needs to key features of Blyanalytics tools	Discuss authoritative data environment	Identify challenges. opportunties &	envir orimental constraints
Day 2	Business Case & Errenpinse Requirements	The case for Bl/analytics	Industry outlook for Biranalytics	Enterprise level - business requirements	Identify business goals. Objectives, and stakeholders	identify high-fevel data/ analytics requirements	Map business needs to key	features of Bl/analytics tools
Day 1	Workshop Preparation (Offsite)	Workshop objectives and scope planning	Confirm workshop objectives	and scope	Identify up to three areas that will contribute in the workshop	Set workshop agenda and secure participants	commitment	Information gathering

5-Day Workshops

## Amendment 4

This Amendment 4 amends the Master Price Agreement between the Midwestern Higher Education Compact and Info-Tech Research Group Inc., Contract No.: MHEC-130214, dated February 20, 2013 (the "Agreement").

The parties agree to amend the Agreement as follows:

Section 5. Term shall be deleted in its entirety and replaced with the following:

5. Term: This Master Agreement will be formed upon execution by the Parties, and shall remain in effect, unless otherwise terminated pursuant to the terms of the Master Agreement until December 31, 2019. The Master Agreement may be mutually renewed for one (1) additional one-year terms unless terminated pursuant to the terms of this agreement.

Except as set forth above, the Master Price Agreement shall remain as stated. In the event of a conflict between the terms found elsewhere in the Master Agreement and this Amendment 4, this Amendment 4 shall control.

**Midwestern Higher Education** Commission

Bandle Signature

Susan Heegaard Name

President Title

12/10/18 Date

Info-Tech Research Group Inc.

Signature

Ilya

Corporate Title

Nov. 27, 2018

## Amendment 3

This Amendment 3 amends the Master Price Agreement between the Midwestern Higher Education Compact and Info-Tech Research Group Inc., Contract No.: MHEC-130214, dated February 20, 2013 (the "Agreement").

The parties agree to amend the Agreement as follows:

Section 1. Term shall be deleted in its entirety and replaced with the following:

- 1. **Eligible Organizations**: This Master Agreement shall be made available to all Eligible Organizations. Eligible Organizations shall include:
  - a. Member State: refers to any state that is a member, or an affiliate member, of the Midwestern Higher Education Compact ("MHEC"). For purposes of this Master Agreement the current MHEC Member States are Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota and Wisconsin.
  - b. NEBHE Member State: State refers to any state that is a member, or an affiliate member, of the New England Board of Higher Education ("NEBHE"). For purposes of this Master Agreement the current NEBHE Member States are Connecticut, New Hampshire, Maine, Massachusetts, Rhode Island, and Vermont.
  - c. SREB Member State: refers to any state that is a member, or an affiliate member, of the Southern Regional Education Board ("SREB"). For purposes of this Master Agreement the current SREB Member States are Alabama, Arkansas, Delaware, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, and West Virginia.
  - d. WICHE Member State: refers to any state that is a member, or an affiliate member, of the Western Interstate Commission for Higher Education ("WICHE"). For purposes of this Master Agreement the current WICHE Member States are Alaska, Arizona, California, Colorado, Hawai'i, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming and U.S. Pacific Territories and Freely Associated States.
  - e. All not-for-profit private and public institutions and/or systems of higher education (colleges, universities, community colleges, technical institutions and equivalent institutions) located in a Member State, NEBHE Member State, SREB Member State or WICHE Member State;
  - f. All K-12 schools and school districts located in a Member State, NEBHE Member State, SREB Member State or a WICHE Member State;
  - g. All city, county, and other local governments located in a Member State, NEBHE Member State, SREB Member State or WICHE Member State;
  - h. All state governments and their departments of a Member State, NEBHE Member State, SREB Member State or WICHE Member State;
  - i. Eligible Organizations located in a Member State, NEBHE Member State, SREB Member State or WICHE Member State that terminates its association with MHEC, NEBHE, SREB

or WICHE respectively, will no longer be eligible to acquire Products or Services pursuant to this Master Agreement. Termination by any Member State, NEBHE Member State, SREB Member State or WICHE Member State shall not prohibit or restrict Vendor from negotiating or contracting with such Member State, NEBBHE Member State, SREB Member State or WICHE Member State or entities within such states outside of MHEC. MHEC shall promptly notify Vendor in writing of the termination of any membership in MHEC, NEBHE, SREB or WICHE. If any Member State, NEBHE Member State, SREB Member State or WICHE Member State so terminates its membership, such termination shall not affect the validity or enforceability of or constitute a default under any Order then in effect with any Eligible Organization. Similarly, MHEC shall promptly notify Vendor if other states join MHEC, NEBHE, SREB or WICHE after which such states shall be deemed to be a Member State, NEBHE Member State, SREB Member State or WICHE Member State, SREB Member State, SREB Member State or WICHE Member State for purposes of this Master Agreement.

Except as set forth above, the Master Price Agreement shall remain as stated. In the event of a conflict between the terms found elsewhere in the Master Agreement and this Amendment 3, this Amendment 3 shall control.

**Midwestern Higher Education** Commission Nam

Title Date

Info-Tech Research Group Inc.

Signature

Mar. 2, 2018

Date

## Amendment 2

This Amendment 2 amends the Master Price Agreement between the Midwestern Higher Education Compact and Info-Tech Research Group, Contract No.: MHEC-130214, dated February 20, 2013, as amended January 1, 2017 (the "Agreement").

The parties agree to amend the Agreement as follows:

Section 5. Term shall be deleted in its entirety and replaced with the following:

5. Term: This Master Agreement will be formed upon execution by the Parties, and shall remain in effect, unless otherwise terminated pursuant to the terms of the Master Agreement until December 31, 2018. The Master Agreement may be mutually renewed for two (2) additional one-year terms unless terminated pursuant to the terms of this agreement.

Except as set forth above, the Master Price Agreement shall remain as stated. In the event of a conflict between the terms found elsewhere in the Master Agreement and this Amendment 2, this Amendment 2 shall control.

**Midwestern Higher Education** Commission

66.004

505 Title

Info-Tech Research Group Inc.

Signature

Ryan Hug

Corporate

Dec. 8, 2017 Date

## Amendment 1

This Amendment 1 amends the Master Price Agreement between the Midwestern Higher Education Compact and Info-Tech Research Group Inc., Contract No.: MHEC-130214, dated February 20, 2013 (the "Agreement").

The parties agree to amend the Agreement as Follows:

1. Delete the sentence under the first paragraph, and replace with the following:

This Agreement is made between the Midwestern Higher Education Commission ("MHEC") located at 105 5<sup>th</sup> Ave. S., Suite 450 Minneapolis, MN 55401, on behalf of Eligible Organizations located in the MHEC Member States, and Info-Tech Research Group Inc., ("Info-Tech") located at 3960 Howards Hughes Parkway, Suite 500 Las Vegas, NV 89169. For the purposes of this Master Agreement MHEC and Info-Tech are referred to collectively as the "Parties" or individually as "Party".

- 2. Section 1. Eligible Organizations shall be deleted in its entirety, and replaced with the following:
  - 1. Eligible Organizations: This Master Agreement shall be made available to all Eligible Organizations. Eligible Organizations shall include:
    - a. Member State: refers to any state that is a member, or an affiliate member, of the Midwestern Higher Education Compact ("MHEC"). For purposes of this Master Agreement the current MHEC Member States are Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota and Wisconsin.
    - b. SREB Member State: refers to any state that is a member, or an affiliate member, of the Southern Regional Education Board ("SREB"). For purposes of this Master Agreement the current SREB Member States are Alabama, Arkansas, Delaware, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, and West Virginia.
    - c. WICHE Member State: refers to any state that is a member, or an affiliate member, of the Western Interstate Commission for Higher Education ("WICHE"). For purposes of this Master Agreement the current WICHE Member States are Alaska, Arizona, California, Colorado, Hawai'i, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington, Wyoming and U.S. Pacific Territories and Freely Associated States.
    - d. All not-for-profit private and public institutions and/or systems of higher education (colleges, universities, community colleges, technical institutions and equivalent institutions) located in a Member State, SREB Member State or WICHE Member State;
    - e. All K-12 schools and school districts located in a Member State, SREB Member State or a WICHE Member State;
    - f. All city, county, and other local governments located in a Member State, SREB Member State or WICHE Member State;
    - g. All state governments and their departments of a Member State, SREB Member State or WICHE Member State;

Page 1 of 3 Amendment 1 Info-Tech Research Group MHEC-130214

- h. Eligible Organizations located in a Member State, SREB Member State or WICHE Member State that terminates its association with MHEC, SREB or WICHE respectively, will no longer be eligible to acquire Products or Services pursuant to this Master Agreement. Termination by any Member State, SREB Member State or WICHE Member State shall not prohibit or restrict Vendor from negotiating or contracting with such Member State, SREB Member State or WICHE Member State or entities within such states outside of MHEC. MHEC shall promptly notify Vendor in writing of the termination of any membership in MHEC, SREB or WICHE. If any Member State, SREB Member State or WICHE Member State so terminates its membership, such termination shall not affect the validity or enforceability of or constitute a default under any Order then in effect with any Eligible Organization. Similarly, MHEC shall promptly notify Vendor if other states join MHEC, SREB or WICHE after which such states shall be deemed to be a Member State, SREB Member State or WICHE Member State for purposes of this Master Agreement.
- 3. Section 3. Purchase of Services shall be deleted in its entirety and replaced with the following:

3. **Purchase of Services:** Procuring Eligible Organization shall purchase Services from Info-Tech as is more specifically outlined and designated in Services Price List Exhibit A and SA Exhibit B. The Purchase Order and SA shall set forth the Services being purchased, any additional contract terms agreed to by Procuring Eligible Organization and Info-Tech, and the applicable fees. Procuring Eligible Organization and Info-Tech shall enter into one or more SA's with each Purchase Order referencing this Master Agreement. This Master Agreement shall apply to all current and future Services provided to Procuring Eligible Organization by Info-Tech, unless the Agreement is terminated pursuant to Section 6 of this Master Agreement.

A. Existing MHEC Procuring Eligible Organizations being serviced through the Agreement prior to December 31, 2016, may access transitional pricing and product offerings at the time of said Procuring Eligible Organizations renewal with Info-Tech.

4. Section 5. Term shall be deleted in its entirety and replaced with the following:

5. **Term:** This Master Agreement will be formed upon execution by the Parties, and shall remain in effect, unless otherwise terminated pursuant to the terms of the Master Agreement until December 31, 2017. The Master Agreement may be mutually renewed for three (3) additional one-year terms unless terminated pursuant to the terms of this agreement.

5. Exhibit A Services Pricing Exhibit. Shall be deleted in its entirety and replaced with the following:

See attached Exhibit A – Services Pricing Exhibit

6. Exhibit B Service Agreement – SA Shall be deleted in its entirety and replaced with the following:

See attached Exhibit B - Services Agreement - SA

Page 2 of 3 Amendment 1 Info-Tech Research Group MHEC-130214

Subject to the modifications herein, the Agreement shall remain in full force and effect.

The effective date of this Amendment 1 is January 1, 2017.

Midwestern Higher Education Commission

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Title

Date: 1-3-2017

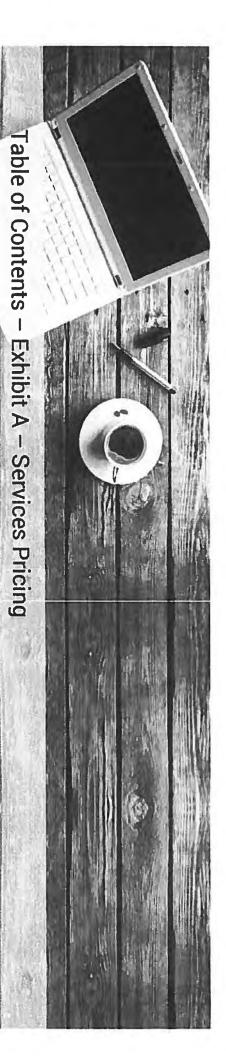
Info-Tech Research Group Inc.

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Dec. 21, 2016

Page 3 of 3 Amendment 1 Info-Tech Research Group MHEC-130214



Step 2 Begin Using Data to Decide What Matters	Step 1 Move to Objective IT Performance Measurement	3.0 Info-Tech's Data-Driven Insight Program	Systematically Improve IT Performance	How We Deliver	About Us	2.0 Executive Summary	On-Site Warkshops	Small Enterprise Basic membership	CIO Counselor Membership	Advisory Membership Features	Reference Membership Features	MHEC Membership Pricing
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1.0 Membership Pricing

Step 6 Use High-Impact, Low-Effort Experiences to Get the Job Done Faster and With More Success

Step 5 Accelerate Key Projects Using Best-Practice Methodologies and Tools

Step 4 Utilize Role-Specific Roadmaps

Step 3 Use Best-Practice Training for Your Team

Step 7 Objectively Measure IT Improvement Year Over Year

	Custom	8 seats	7 seats	6 seats	5 seats	4 seats	3 seats	2 seats	1 seat (available only to companies with 10 or less in IT)	# of Advisory Seats	1.0 MHEC Mei
Content is not Price Escala date, that a Index (CPI-L	Custom	Up to 72	Up to 63	Up to 54	Up to 45	Up to 36	Up to 27	Up to 18	Up to 9	# of Reference Seats & Web Access (Additional Reference Seats \$100/month per seat less 5%)	1.0 MHEC Membership Pricing
<ul> <li>Content is not restricted by seat type &amp; programs can be customized to tea</li> <li>Price Escalation: The parties agree that the annual price increase, as def date, that affects the MHEC Price shall not exceed 5% or the United Stat Index (CPI-U), whichever is greater.</li> </ul>		+ Data & BI	+ Vendor Management	+ Enterprise Architecture	+ Portfolio & Project Mgmt.	CIO, APPS, INFRA, SECURITY	CIO, APPS, INFRA	CIO, APPS	CIO	Programs Available	
programs can be customized to teams needs. at the annual price increase, as defined as the effectiv all not exceed 5% or the United States Consumer Price	Custom	\$8000/Month less 5%	\$7000/Month less 5%	\$6000/Month less 5%	\$5000/Month less 5%	\$4000/Month less 5%	\$3000/Month less 5%	\$2000/Month less 5%	\$1000/Month less 5%	Investment	
ains needs. fined as the effective tes Consumer Price							2%	+\$1000/Month less		Annual Onsite (Strategy Workshop) Membership	

## Reference Membership Features

M		카미							G
Webinars, Videos & Info- Graphic Libraries	Info-Tech Acaderny	IT Management & Governance Framework	IT Best-practices Research & Training	Security	Infrastructure	Applications	CIO	Role Based Research	Core Project and In Technology n Research ii
A full library of webinars, videos & infographics	Access to our Learning Management system & Audio/Video Training Material across all major roles	45 comprehensive, connected methodologies for k improving core IT processes.	search & Training	Vendor Management	Enterprise Architecture	Data & Bl	Project & PPM		Instructional blueprints for implementing proven methodologies for applications, strategy and infrastructure projects.
Ш	Ŵ	S					C	Ø	
Software Directories Unbiased vendor research to help accelerate your product & Vendor selection processes.	Job Descriptions and Policies Library	Tools & Templates	Additional Features		Department	Mclean Leadership Index for the IT		Talent & Leadership Research	
Unbiased vendor res selection processes.	Never write another job description or IT policy from scratch again; use our extensive library of templates instead.					= =.		S I	

INFO~TECH

Evaluations

INFO~TECH

CIO Counselor Membership \$4000/month less 10%

his or her environment to enable more tailored and timely advice across a spectrum of issues manager. This Membership fosters in depth knowledge of the executive and The CIO Counselor Membership supports an individual IT executive or

• An Advisory seat with all its features (No Reference seats included). Also Includes

 $\checkmark$  • One On-Site Workshop with our seasoned IT experts

 $\checkmark$  • A dedicated IT Counselor who is "Always On" with Monthly Advisory Calls. The Counselor will provide:

• One-on-One Executive Coaching for career skills and development

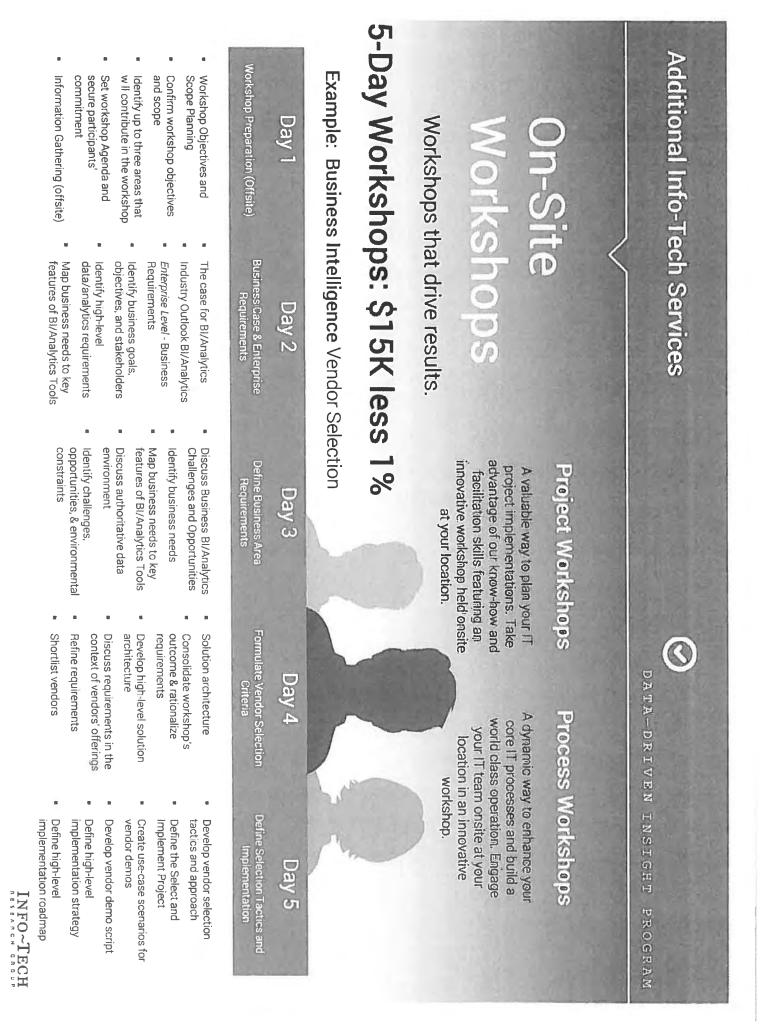
 A minimum of monthly calls to explore your business challenges, facilitate in IT projects and offer insight into innovations from across our member

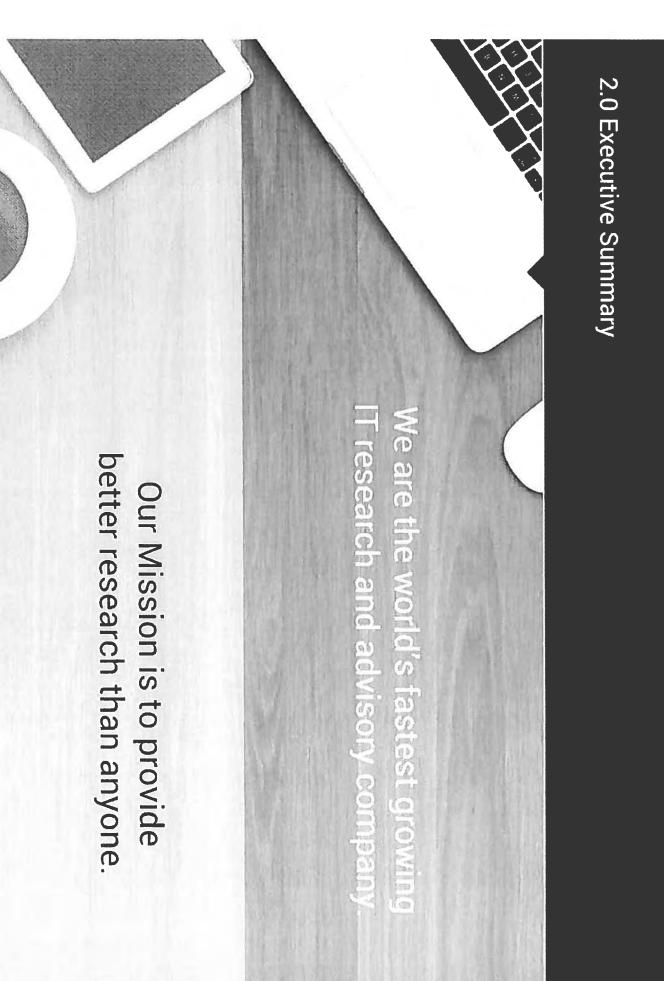
 On-Demand advice and access to additional resources to help you with unique issues base

 $\checkmark$  • On-Site support to develop a structured engagement plan.

## Small Enterprise Basic \$500/month less 5%

- Small Enterprises with 5 or less employees in IT may purchase this membership which provides:
- Up to 5 users with access to Info-Tech website.
- One single advisory call.
- Management & Governance Diagnostic.







## About Us

Info-Tech Research Group is the world's fastest growing information technology research and advisory company, proudly serving over 30,000 IT professionals.

We are, by far, the most innovative firm in the industry and we pride ourselves on providing better research than anyone.

Since 1997, we have been helping CIOs and their teams evolve from fire fighters to innovation champions.

We produce unbiased and highly relevant research & tools to help IT leaders make strategic, timely, and well-informed decisions that drive IT improvement.

We partner closely with IT teams to provide everything they need – from actionable tools to in-person analyst guidance – to deliver measurable results for their organizations.

## The Info-Tech Advantage

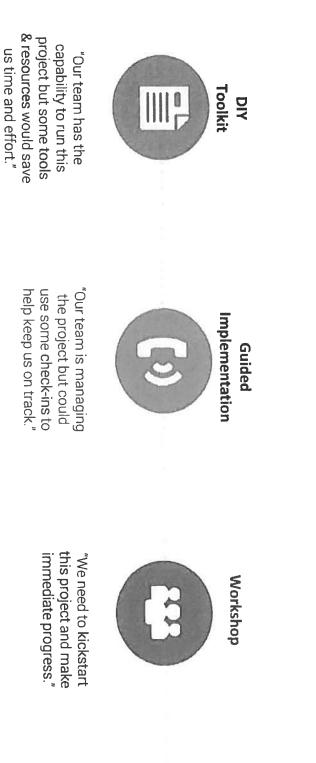
Our Data-Driven Insight Program enables IT organizations to objectively measure their performance, develop key initiative plans with role-based roadmaps, access our innovative research and industry experts, and systematically improve performance year over year.

We move beyond reports, providing in-person experiences and expertise that drive sustainable IT improvement.

As the fastest growing and one of the top 10 largest IT research and advisory companies in the world, Info-Tech is well positioned to address your key IT strategic initiatives and provide state-of-the-art technical analysis on a variety of IT subjects.

# How We Deliver – We deliver the level of support that best suits your needs:

- Do-it-yourself tools, best-practice methodologies, and final deliverables
- Guided implementations to give you on-demand project support when it really matters
- Four to five-day on-site workshops for critical projects
- Longer-term consulting to provide assistance across the entire project





"Our team does not have the time or the knowledge to take this project on. We need assistance through the entirety of this project."

<ul> <li>The Challenges of an IT Leader</li> <li>IT issues are as numerous as they are complicated, and being an IT leader has never been more complex.</li> <li>Business needs change rapidly, and reactive, ad hoc department improvements are not as effective or repeatable as systematic improvements.</li> <li>It's impossible to manage an IT department in a systematic and reliable way without detailed data, so objective measurement of IT performance is an absolute requirement.</li> </ul>	At the heart of Info-Tech's services is our Data-Driven Insight Program, a seven-step action plan that heips IT leaders objectively measure and improve their department's performance and, ultimately, improve their organization's bottom line. We understand the challenges you face as an iT leader, and possess the expertise you need to overcome these obstacles.	3.0 Info-Tech's Data-Driven Insight Program
Our Solution: The Data-Driven Insight Program Info-Tech enables you to tackle all of these challenges through our Data-Driven Insight Program – a continual improvement process that will help you work towards a singly paramount goal: increased business satisfaction.		0

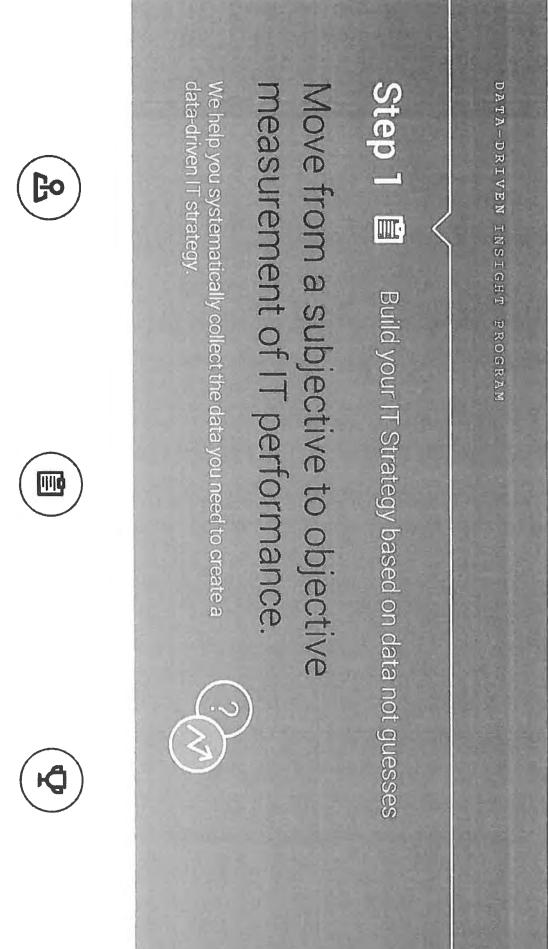
• IT leaders struggle to engage their staff and clearly establish accountability around core department processes. Without this clear ownership and accountability, processes cannot be improved.



Objectively measure IT performance using our Data-Driven Insight Program.



and more successfully



improvements to key stakeholders Confidently report year-over-year You deserve to be recognized

INFO~TECH

details behind their satisfaction

with core services

**Objectively Measure IT Prove Your Merit** Performance &

understand their priorities and the

Stakeholders have complex needs Effectively

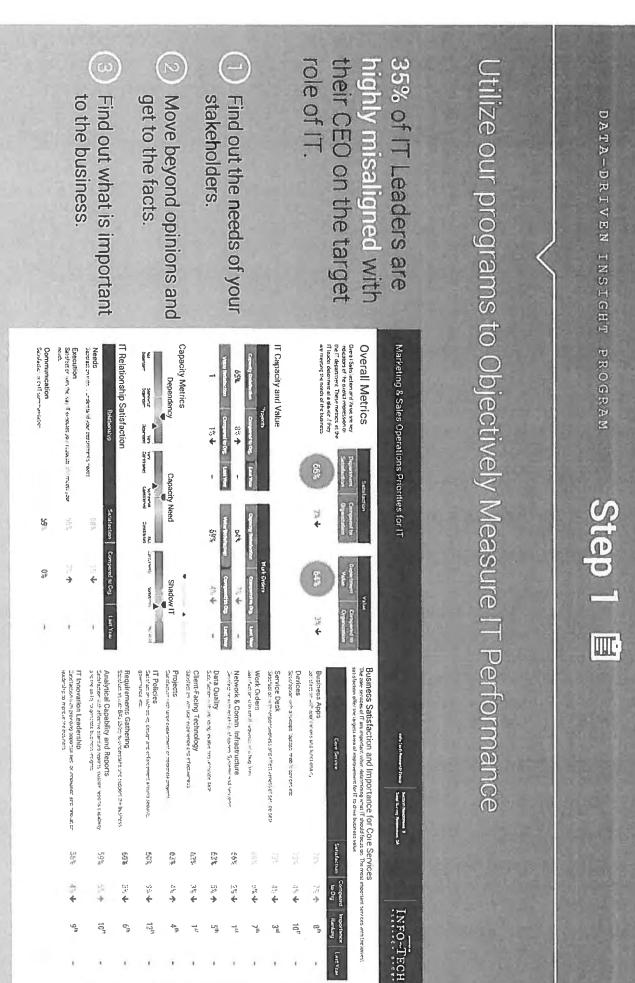
Allocate Resources more **Understand Needs &** 

Set Goals for Your Team &

Align to Business Needs

Rally your team behind a big picture goal that is more than a deadline

increase stakeholder satisfaction



INFO~TECH

<ol> <li>Measure overall business stakeholder satisfaction</li> <li>Highlight the business impact of IT constraints</li> </ol>	We help you:	Understand your key business stakeholders, find out what is important to them, and improve your interactions.	Info-Tech's CIO Business Vision program is a low effort, high impact program that will give you detailed report cards on the organization's satisfaction with IT's core services.	The most important thing IT can do is understand business needs and actively measure business satisfaction	CIO Business Vision	DATA-DRIVEN INSIGHT PROGRAM
		International Control     International Control <td< td=""><td></td><td></td><td>Image: state state</td><td></td></td<>			Image: state	

- U
- 3) Understand & manage individual stakeholders
- 4 Collect feedback by department to clearly understand needs



## Step 2 🔟 Begin using a fact-based, data-driven approach to managing IT.

Objectively identify what needs to improve with robust, member-tested diagnostic programs

We help members tackle key IT issues through datadriven decision making. Justify that IT spending provides the most value to the entire organization by focusing on business satisfaction. Our programs are the key to comprehensive alignment with the business.

Our diagnostics survey your key stakeholders and provide you with an objective measurement of your department's performance. Once performance is accurately measured, it can be improved – dramatically.

We survey your CIO, your executive stakeholders, and your team to gather objective feedback on your department's strengths and weaknesses.

- 1. Choose from our selection of Diagnostic programs.
- Tell us who your stakeholders are and we'll administer the survey to them.
- 3. We tabulate your results and publish your final report.
- 4. Our analysts present you with key insights.

Info-Tech's diagnostic programs are unique to the industry and are key differentiators of our service offering.

areas more clearly than Info-Tech. some time but none of them have been able to give us analytics that spell out the trouble A number of firms, including the Big Four, have been in the 'giving us advice' business for

ClO Fortune 100 Firm Logistics

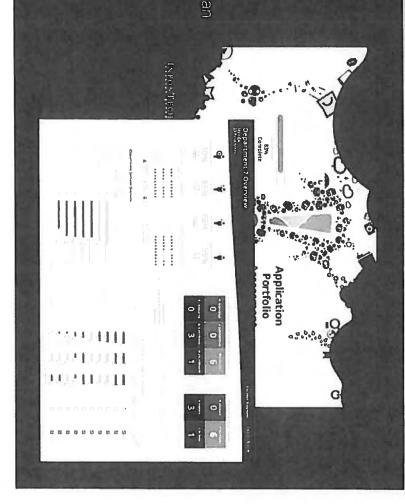


## App Portfolio Assessment

Determine which applications to retire, upgrade, re-train on, or maintain

Application portfolio management is nearly impossible without an honest and thorough understanding of end-user sentiment.

The Application Portfolio Assessment program helps you determine what users really think of IT's applications.



- 1) Take stock of your current application portfolio
- Assess the health of your portfolio by identifying which apps are not providing business value
- Identify cost saving opportunities by showing you which apps are not being used
- Manage end user needs by department and seniority



## PPM Diagnostic Program

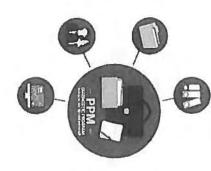
Collect the data you need to understand and optimize your PPM practices

The Project Portfolio Management Diagnostic Program is a low effort, high impact program designed to help project owners assess and improve their PPM practices.

Gather and report on all aspects of your PPM environment in order to understand where you stand and how you can improve

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- 1) Assess your current PPM practices and build a roadmap
- 2) Understand project customer needs through feedback
- Analyze your PPM environment with data and context, then drive success with tailored recommendations and insights.
- Optimize your PM practices through end-to-end analysis and customized tactical recommendations.



DATA-DRIVEN INSIGHT

# IT Security Diagnostic Program

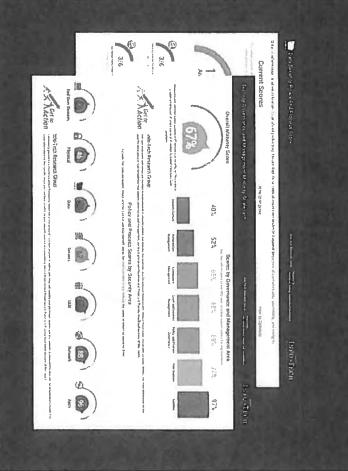
### manage IT Security Collect the data you need to effectively

area including. This program will help you understand each process governance

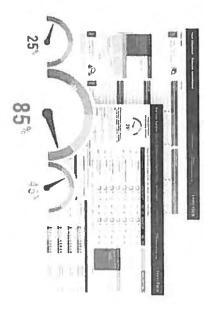
- Auditing
- Compliance management
- Event and incident
- management
  - Security culture

Risk analysis

Vulnerability management



- 1) Assess current operations based on best practices
- 2) Measure business satisfaction and identify security needs
- ω Improve targeted IT Security areas





## CEO-CIO Alignment Program

67% of CIOs & CEOs are not aligned on the target role for IT and 49% aren't even aligned on current IT performance

- Short 20 question survey on IT Direction and Execution
- Complete with your CEO, CFO, COO, and/or whoever your manager is
- Road-tested with dozens of CIOs, CEOs, and Business Executives



- 1) Evaluate IT Fundamentals
- 2) Align IT with Business Priorities
- Establish Performance Indicators
- 4) Invest in Technology & Innovation



DATA-DRIVEN INSIGHT PROGRAM	
Infrastructure - End User Feedback	
Find out what users really think of IT services	
Determine which IT services need to be addressed to meet the demands of the business.	General Orenten Betrum Land Land Land Land Land Land Land Land
<b>Evaluate IT core service capabilities.</b> Evaluate importance and satisfaction with core IT services, with drill-downs by seniority and department.	
Assess business enablement and IT communications. Get end-user feedback on IT innovation & agility, and how technology enables them to do their job. Find opportunities to improve IT's reputation and assess IT's receptivity to feedback.	
Provide targeted department feedback. Focus on the right end-user groups or lines of business to ramp up satisfaction and productivity.	

#### Selection Vendor

- 80+ customizable Vendor Landscapes<sup>™</sup> to help you select the right technology solution
- New Vendor Landscapes published weekly and updated annually or as needed

perspective of objectivity. therefore, all Vendor Landscapes are written from a staunch vendors to gain an in-depth knowledge of that particular solution. member demand, and Info-Tech works with the individual Info-Tech firmly believes in providing unbiased research; Vendor Landscape topics are chosen based on market and

#### What's Included

- -A matrix that enables clients to adjust vendor rankings to them. based on the features and offerings that are most important
- Ņ An in-depth report that
- e Explains how vendor rankings are broken down,
- J Reviews each vendor and solution considered in the Vendor Landscape
- <u></u> Provides insight and best practices related to that technology.
- ω solutions and features you should consider for your Unlimited analyst calls to discuss the various technology organization.

easy yet well-informed decisions. narrowing down their technology solution choices and making Our members find Vendor Landscapes to be extremely helpful in

#### Content and Email Archiving Example Vendor Landscape:

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#### Negotiation Contract

Secure the right deal and save thousands to millions of dollar.

insights. can review the contract, identify business risks, and provide storage, data center co-location) to our analysts so that we Send your purchase or renewal contracts (e.g. Microsoft, SAN

your contract negotiation process. appropriate feature options, and general best-practice tips for tailored insight into potential savings, compliance issues, Through a phone consultation, our analysts provide you with

fee for this valuable service. any savings realized from this service or charge an additional Unlike other vendors, Info-Tech does not take a percentage of

review and provide any additional advice we may have After your call, we send a follow-up report to summarize the

agreements, business plans, and requests for proposal the review. Document reviews include procurement be extended into a series of calls depending on the scope of Document review calls are scheduled, one-hour calls but can

#### Savings Found

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#### Job Description, Policy & Template Library

Never start from scratch again. Use our library of practical tools and customizable templates.

## 140+ Job Descriptions including:

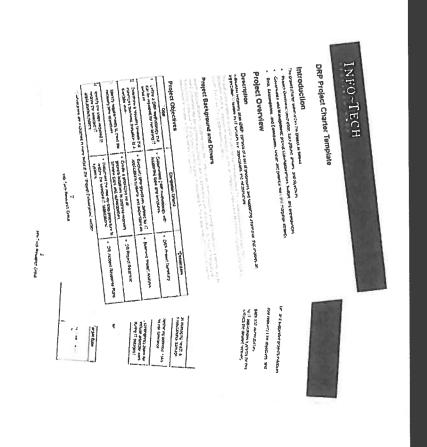
- Application Development Manager
- IT Asset Manager
- Scrum Master
- Chief Data Officer
- Network Engineer

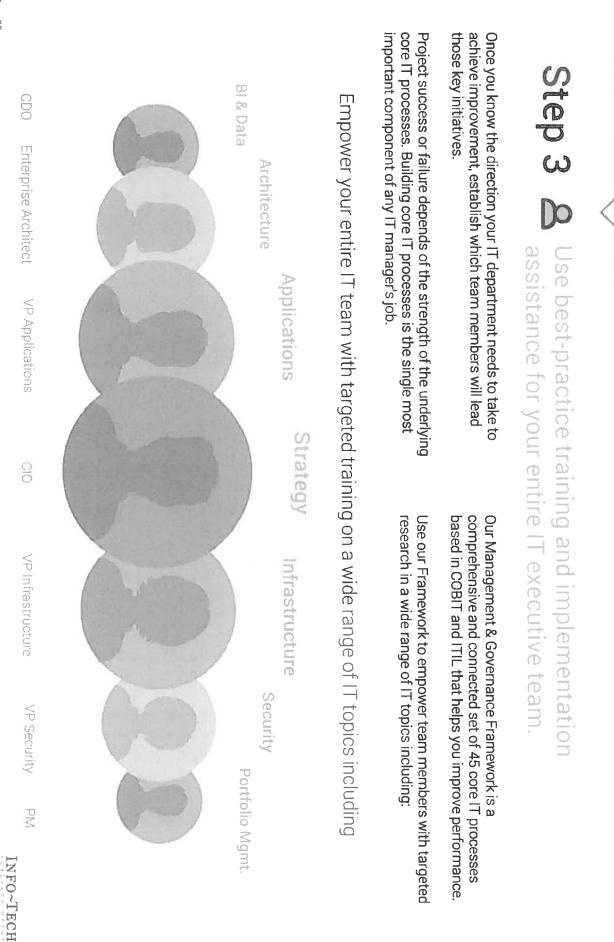
### 1300+ Templates including:

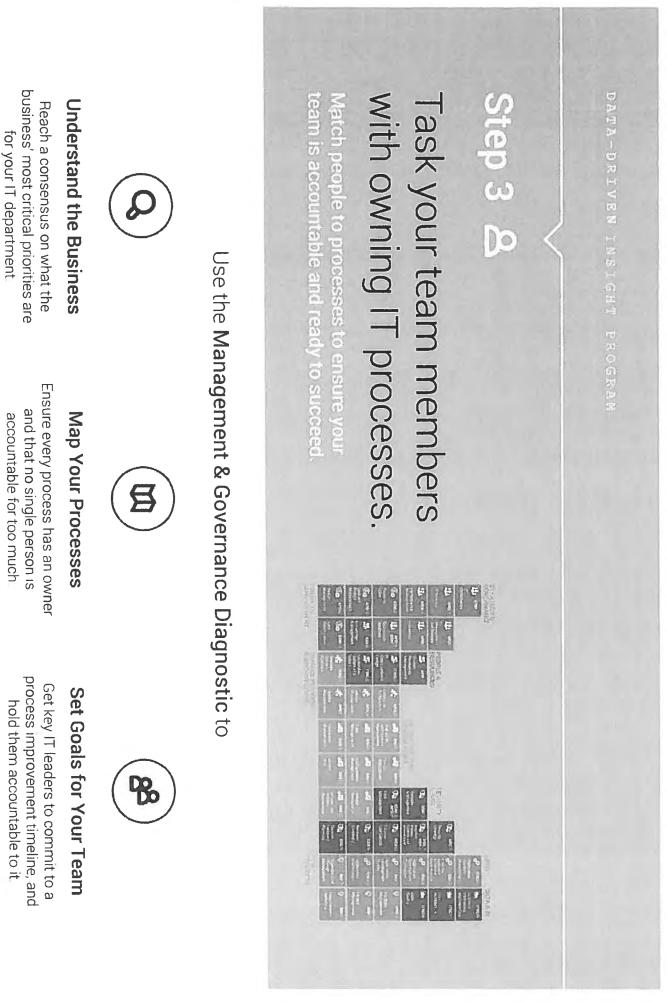
- SOP Template
- Strategic Plan Template
- IT Steering Committee Charter
- Data Center Relocation Project Charter
- Project Plan Template

#### 90+ IT Policies including:

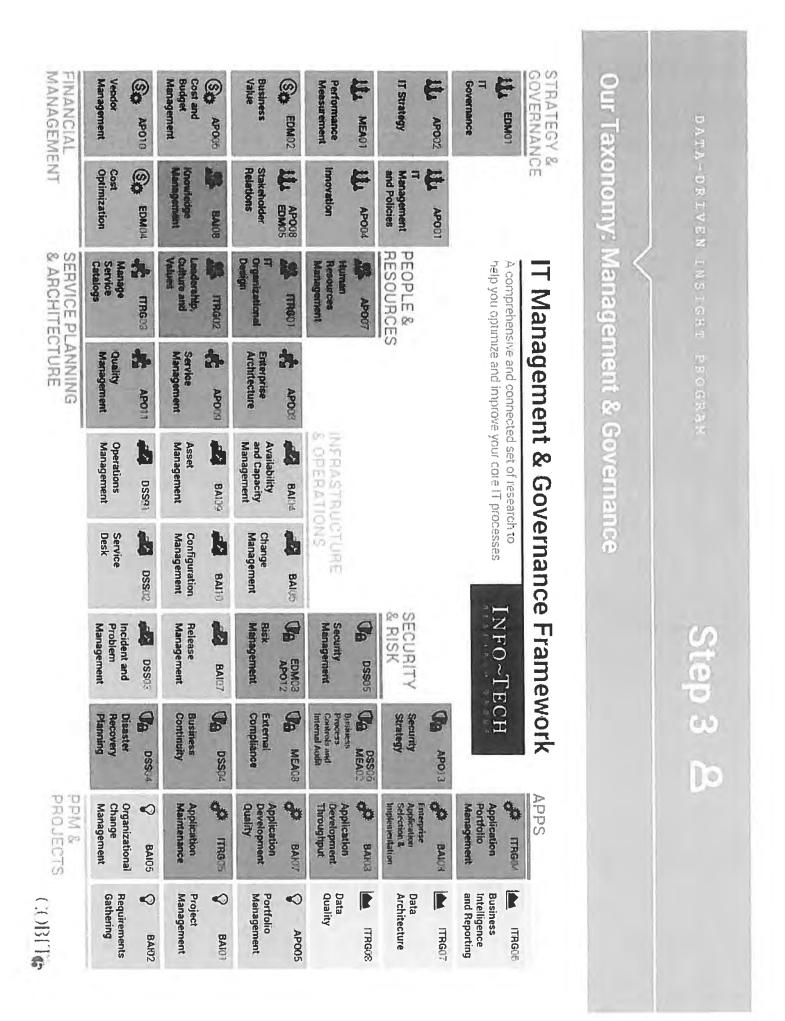
- Internet Acceptable Use Policy
- Patch Management Policy
- IT Triage and Support Policy
- Change Management Policy
- Email Acceptable Use Policy

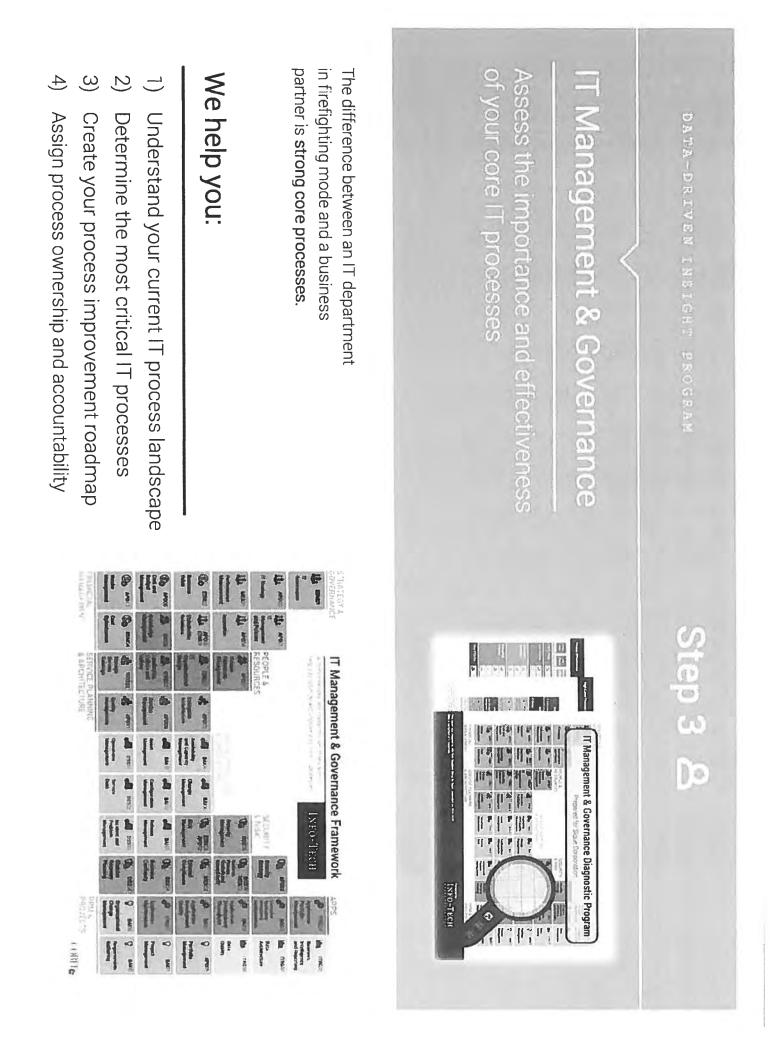




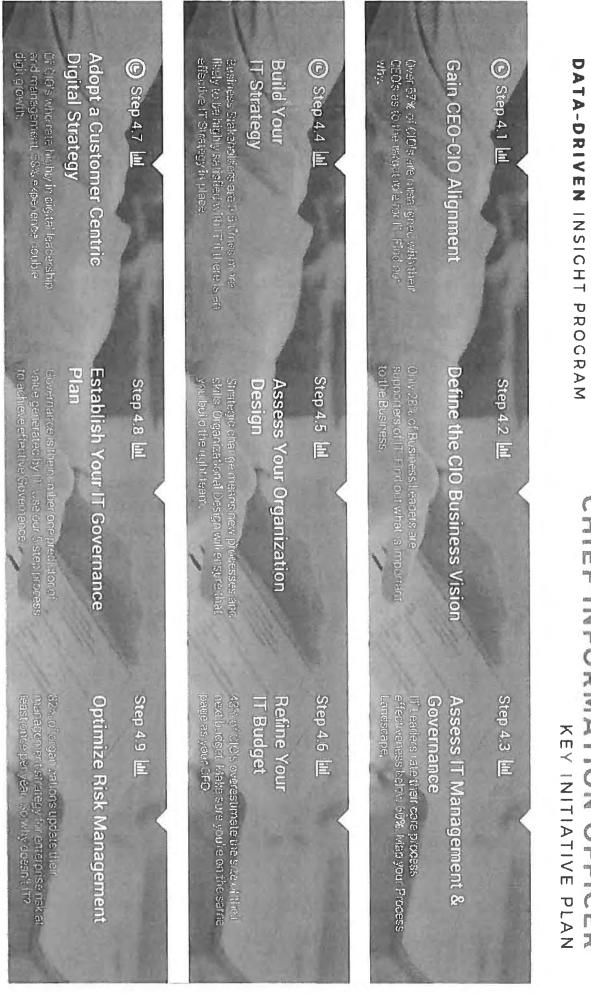


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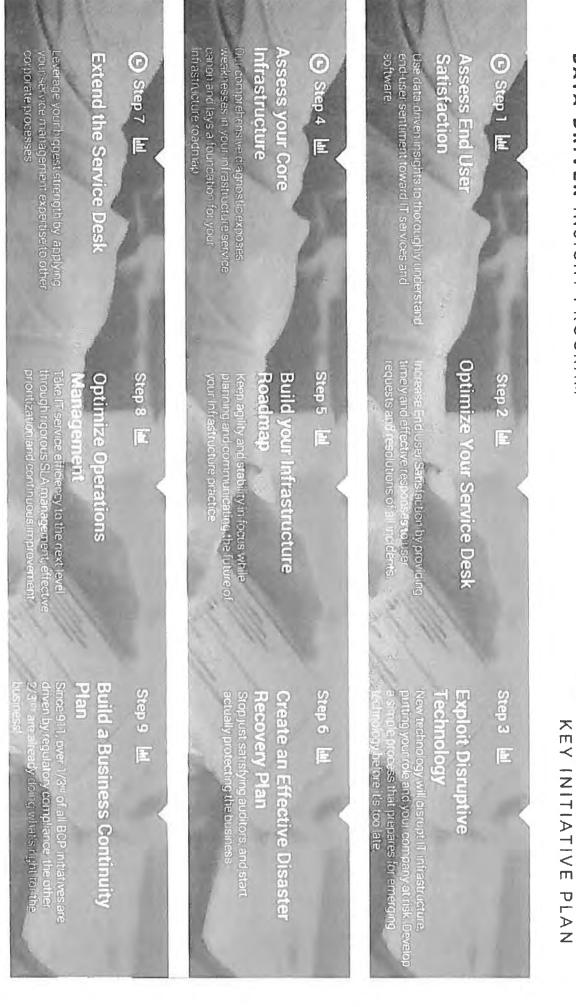




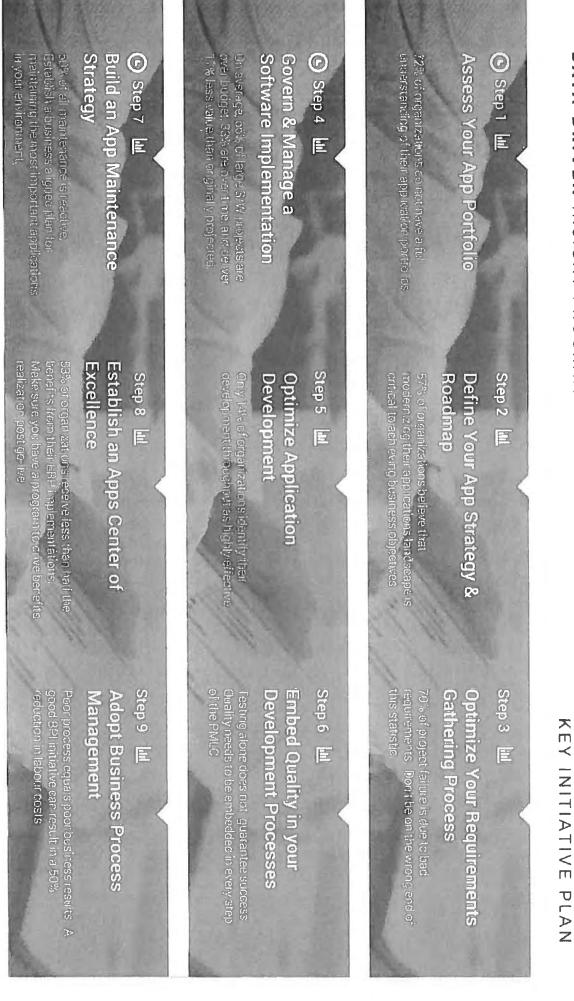
		Pick the Roadmaps that are right for you so you can tackle your most pressing $\ensuremath{IT}$ issues.	Step-by-step initiatives ensure that your IT leadership team has a plan in place for creating real improvement over the course of your membership.	projects that are proven to enhance your department's capability and drive increased business satisfaction.	We provide you with tools and training to help you succeed at key	Each Roadmap includes a series of diagnostics to help you assess strengths and weaknesses of your current state as well as help you envision your target	Get support for your IT leadership team. Our Roadmaps help you build and manage core IT functions to systematically improve performance.	Utilize our Role-Specific Roadmaps to drive process maturity & sustainable IT improvement	Step 4 🖾 Create Roadmaps for Key IT I	DATA-DRIVEN INSIGHT PROGRAM
INFO-TECH	Portfolio Management Key Initiative Plan	Business Intelligence Key Initiative Plan	Enterprise Architecture Key Initiative Plan	B Security Key Initiative Plan	Vendor Management Key Initiative Plan	Key Initiative Plan	Applications Key Initiative Plan	Cio Key Initiative Plan	IT Executives	



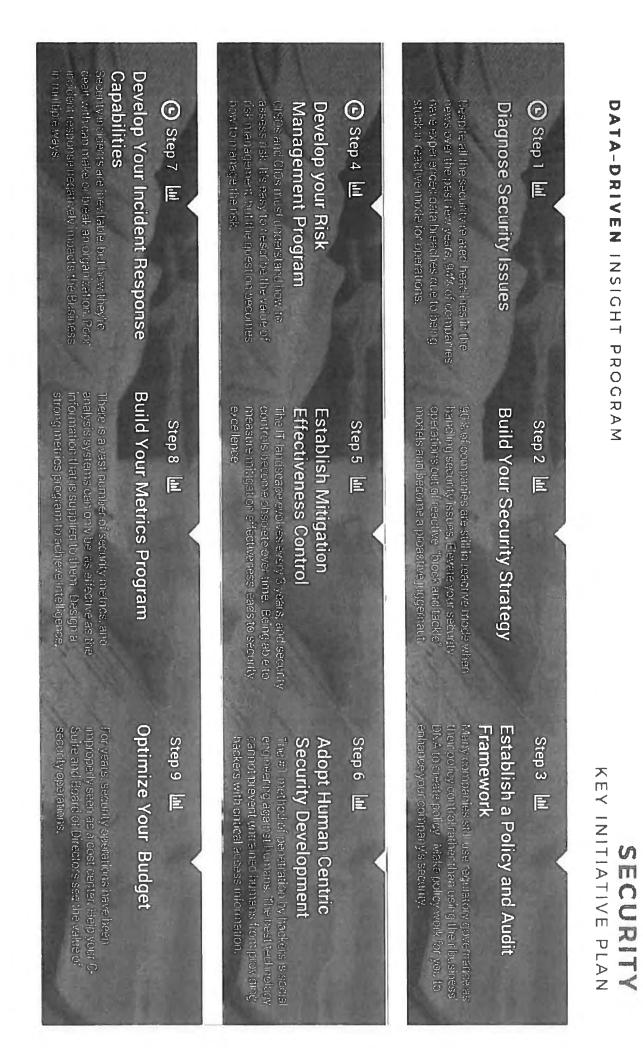
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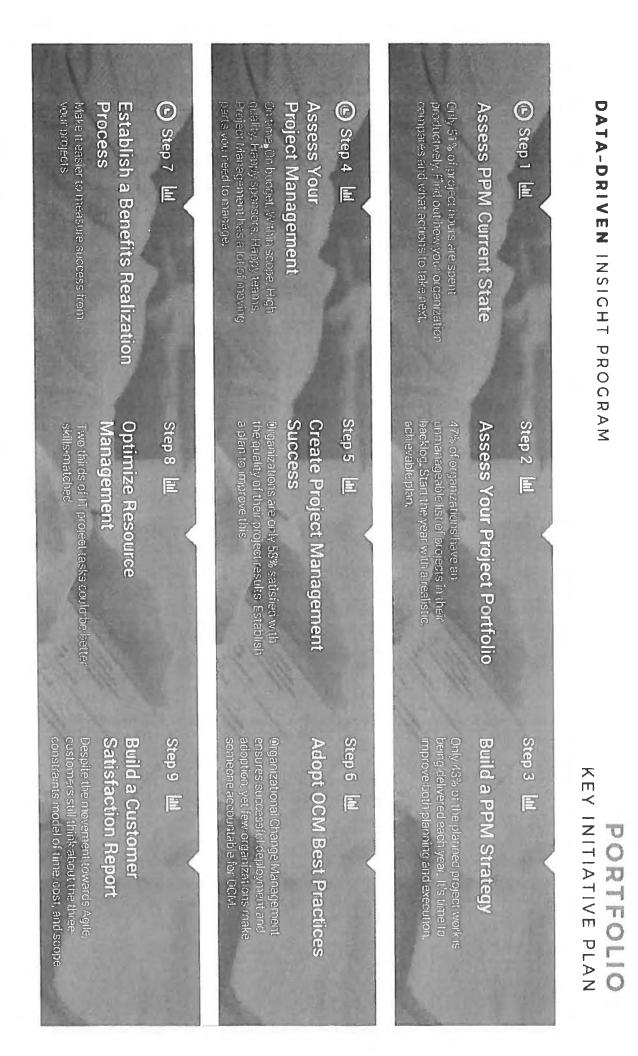


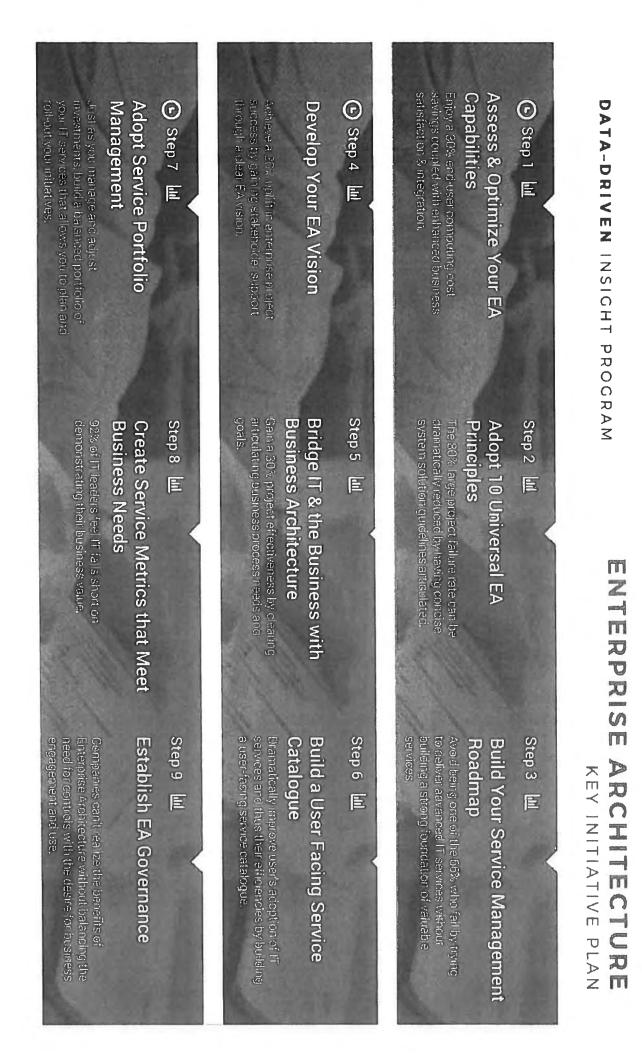
KEY INITIATIVE PLAN

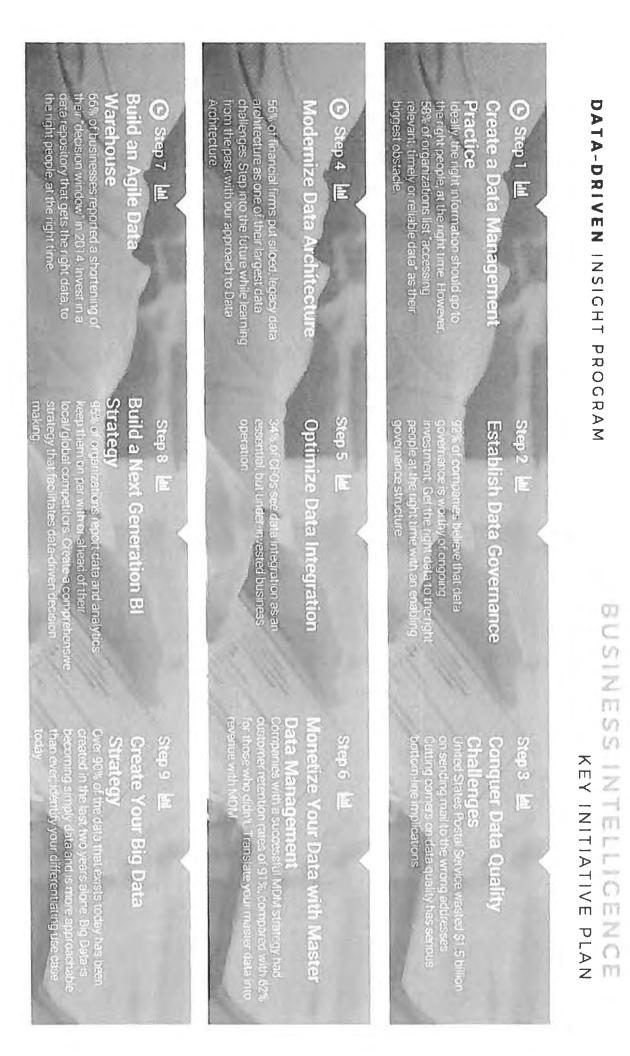


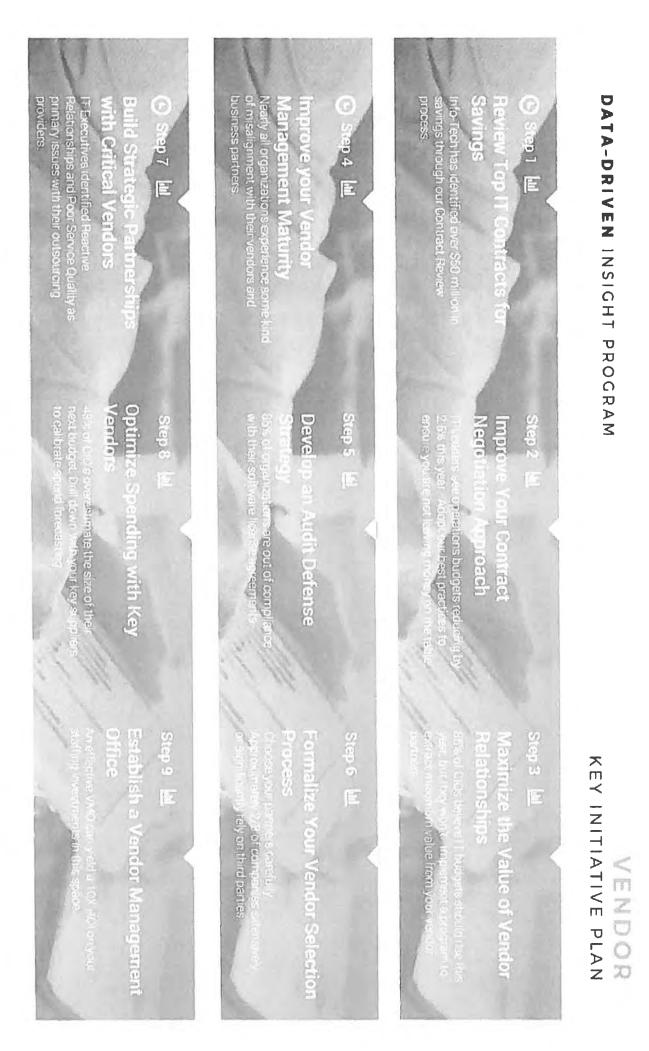
APPLICATIONS KEY INITIATIVE PLAN











We spend millions of dollars annually developing consulting-quality tools and templates for every project so that <b>you can get to action as quickly as possible</b> .	tools and templates that give our members the edge they need to complete their IT projects successfully.	their most important 11 initiatives. Included in these Blueprints are over 1,000 supporting	We offer more than 450 do-it-yourself project and process Blueprints, developed by our industry experts to help our members save time and money when it comes to tackling	Innovative Blueprints	Practical Tools that deliver measurable value.	Accelerate your key projects with Methodologies and	Step 5 🌣 Utilize Tools & Best	DATA-DRIVEN INSIGHT PROGRAM
INFO-TECH	<ul> <li>boardroom-ready deliverables</li> <li>Insights from over 34,000 other members</li> </ul>	<ul> <li>Practical and easy-to-use tools, templates, and</li> </ul>	<ul> <li>Info-Tech's innovative Blueprints provide:</li> <li>Step-by-step methodologies and DIY project plans,</li> </ul>		urable value.	Methodologies and	st Practices for Key Projects	

Architecture Roadmap Presentation Template	Phase 3: Translate your planned initiatives into a sequenced roadmap.	<ul> <li>Data Architecture Assessment and Roadmap Tool</li> <li>Initiative Definition Tool</li> </ul>	Phase 2: Evaluate the current and target capabilities of your data architecture, identifying performance gaps to build a fit-for-purpose practice. Assess Data Architecture Capabilities	<ul> <li>Develop a Data Architecture Vision</li> <li>Modernize Data Architecture Project Charter</li> <li>Data Architecture Strategic Planning Workbook</li> </ul>	Phase 1: Plan your data architecture project and align it with the business and its strategic vision.	Example Project: Modernize Data Architecture for Measurable Business Results	DATA-DRIVEN INSIGHT PRO
Info-Tech's research catalog boasts over 500 powerful Excel tools, tailor-made to fit every imaginable purpose.						Powerful tools in an in- identify what's wrong and when	PROGRAM Step 5 🌣

Phase 5: Roll-out the DRP to Remaining Apps DRP Pilot Results Presentation Templates	Phase 4: Document your Incident Response Plans  DPP Incident Response Management Tool  Severity Definitions and Escalation Rules Template	Phase 3: Identify projects to close gaps and mitigate risks  T DRP Project Roadmap Tool	Phase 2: Identify key applications and dependencies          XI       DRP Business Impact Analysis Tool	Phase 1: Create a DRP pilot project charter	Example Project: Create a Right-Sized Disaster Recovery Plan Create a Right-Sized Disaster Recovery Plan	DATA-DRIVEN INSIGHT PROGRAM
With over 800 plan and policy templates at your fingertips, your team will never need to start from scratch again.	No Ten Neuenn Grag	VCC- PLANCE CURPT	-ber 2	HUBIARD	Ready-to-use Templates that make life easier	Step 5 🌣

Deliver presentations prepared by our analysts to easily impress your stakeholders with minimal effort.	Deliver pr ana stake	New York	Agreement, Adopting Best Practices for Future License Management
			Phase 4: Manage Purchases and Licenses
rogalie en agile and sectorsie date anchearture	neprodukte normalised Data activity and the underlying data standards	now manage require a na- avaluance of the underprog data auchitectures	Phase 3: Evaluate Agreement Options Choose the Agreement Most Suited to your Organization
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			Phase 2: Evaluate Licensing Options
Regulatory Changes Rabby enarging weg atom asserter that the source the over for buy respiratory	Unatructured Data Hagenar Helbads for Interactures organized and and accessing data velo (expressing data velo (expression antiduce) ante	Big Deta The capacity of traditional data storage and processing systems is limiting companies ability to leverage data effectively	(ELP) remplate Microsoft Licensing Purchase Reference Guide
Changes in data scope, usage, and complexity require a shift in how data architecture is approached and performed	isage, and complexity red and performed	Changes in data scope, usage, and comple architecture is approached and performed	Microsoft Licensing Effective License Position
			Phase 1: Establish Licensing Requirements
that give you credibility.	that		Review Microsoft Licensing
m-ready deliverables	Roardroor		Example Project:
**	Step 5 🛠		DATA-BRIVEN INSIGHT PROGRAM

<ul> <li>90+ IT Policies including:</li> <li>Internet Acceptable Use Policy</li> <li>Patch Management Policy</li> <li>IT Triage and Support Policy</li> <li>Change Management Policy</li> <li>Email Acceptable Use Policy</li> </ul>	<ul> <li>1300+ Templates including:</li> <li>SOP Template</li> <li>Strategic Plan Template</li> <li>IT Steering Committee Charter</li> <li>Data Center Relocation Project Charter</li> <li>Project Plan Template</li> </ul>	<ul> <li>140+ Job Descriptions including:</li> <li>Application Development Manager</li> <li>IT Asset Manager</li> <li>Scrum Master</li> <li>Chief Data Officer</li> <li>Network Engineer</li> </ul>	Never start from scratch again. Use our library of practical tools and customizable templates.	Job Description, Policy & Template Library	
	3	Image: State			

Page 42

<ul> <li>IT Strategy</li> <li>Tailor an IT Governance Plan to Fit Organizational Needs</li> <li>Become a Strategic CIO</li> <li>Establish an Effective IT Steering Committee</li> <li>Inspire an IT-Led Revolution</li> <li>Create Project Management Success</li> <li>Optimize the Change Management Process</li> <li>Fast Track a Service Management Process</li> <li>Design &amp; Build a User-Facing Service Catalog</li> <li>Develop an Enterprise Architecture Vision Establish a Service Metrics Program that Meets Business Needs</li> <li>Vendor Management</li> <li>Kick-Start IT-Led Business Innovation</li> <li>Adopt Organizational Change Management Best Practices to Maximize Project Benefits</li> <li>Drive Efficiency and Agility with a Fit-for- Purpose Quality Management Program</li> <li>Risk Management</li> <li>T Organizational Design</li> <li>Transform IT through Strategic</li> </ul>	Strategy & Leadership – Se	DATA-DRIVEN INSIGHT F
<ul> <li>Organizational Design</li> <li>Requirements Gathering</li> <li>Bridge IT and the Business with Business Architecture</li> <li>Five Secrets to Optimize Your People, Technology, and Budget</li> <li>Wow the CFO with an IT Budget That Demonstrates Value Delivery</li> <li>Create a Culture of Recognition to Propel IT Performance</li> <li>Establish the Benefits Realization Process</li> <li>Establish an Effective System of Internal IT Controls to Mitigate Risks</li> <li>Optimize IT Procurement</li> <li>Manage Stakeholder Relations</li> <li>Adopt 10 Universal Enterprise Architecture Principles</li> <li>Make IT a Successful Partner in M&amp;A Integration</li> <li>Create a Dynamic Plan to Tackle HR Issues</li> </ul>	Selected Content	PROGRAM Ste
<ul> <li>Establish a Rigorous Problem Management Process</li> <li>Establish a Service-Based Costing Model</li> <li>Establish an Effective PMO for IT</li> <li>Make the Case for the Hybrid IT Operating Model</li> <li>Align IT with the Real End Customer Fast Track Your Team's Leadership Skills</li> <li>Transfer IT Knowledge Before It's Gone</li> <li>Make IT a Partner in Successful M&amp;A Due Diligence</li> <li>Covertly Establish a Business-Centric Value-Driven EA Capability</li> <li>Improve Your Time Management as a Working Manager</li> <li>Get Ready for the Evolution of Vendor Management</li> <li>Lead a Digital Transformation to Advance Revenue Generation</li> <li>Take Control of Compliance Improvement to Conquer Every Audit</li> <li>Focus on Project Management Essentials</li> <li>Improve Accountability for Vendor Management Excellence</li> <li>Decode the Corporate Strategy</li> <li>Lead Staff through Change</li> </ul>		tep 5 🌣

Page 44

<ul> <li>Develop a Master Data Management Strategy and Roadmap</li> <li>Build an Applications Roadmap</li> <li>Optimize Project Intake Approval and Prioritization</li> <li>Grow Your Own PPM Solution</li> <li>Develop a Winning BI Strategy</li> <li>Establish a Concrete ERP Foundation</li> <li>Modernize Data Architecture for Measurable Business Results</li> <li>Manage and Maintain Data Quality</li> <li>Use Agile Application Rationalization Instead of Going Big Bang</li> <li>Develop a Project Portfolio Management Strategy</li> <li>Define and Deploy an Enterprise PMO</li> <li>Select and Implement a Business Intelligence and Analytics Solution</li> <li>Select and Implement an ESB Solution</li> <li>Establish Effective Data Governance</li> <li>Portfolio Management</li> <li>Develop and Implement an Effective</li> </ul>	Applications – Selected Content	DATA-DRIVEN INSIGHT PR
Data Management Strategy and Roadmap Data ArchitectureModernize Your Corporate Website to DriveBusiness ValueSelect and Implement a CRM Platform Vendor Landscape: Higher Education ERPVendor Landscape: Mid-Market ERP Develop a Business Intelligence Tool StrategyApplication Development Vendor Landscape: Enterprise Project Portfolio ManagementOptimize Requirements Gathering to Effectively Serve the Business Plan for Application Consolidation Implement Agile Practices That Work Optimize the Application Maintenance StrategyVendor Landscape: Human Resources information SystemsSelect and Implement a Customer		PROGRAM
Service Management Solution Build a Customer Relationship Management Strategy Build an Agile Data Warehouse Build an ERP Selection and Implementation Strategy Right-Size the Information Governance Program Develop a Mature Testing Practice to Produce Better Quality Applications Control the Policy Management Lifecycle Create a Comprehensive BPM Strategy for Successful Process Automation Vendor Landscape: Enterprise ERP Develop a Resource Management Strategy for the New Reality Implement Business Process Management BPM Implement Information Lifecycle Management Optimize the Organization's Data Integration Practices Develop APIs That Work Properly for the Organization	Our research catalog currently offers more than <b>450 project and process</b> <b>Blueprints</b> , and we are producing more every week. Below, and on the following pages, are a sample of our most popular Blueprints.	Step 5 🌣

Fit DR Solution

Step 5

- and Relevant Performance prise Mobile Applications
- roblem Management
- isiness Alignment with an Roadmap
- Program mplement a Security Incident
- cape: Enterprise Mobility
- ata Centers

Document the DR Plan

Roadmap

Vendor Landscape: Next Generation

Create a Configuration Management

Implement Enterprise Mobility

**Deployment Management Process** Establish a Right-Sized Release and

Management

and Compliance GRC Solution

Select and Implement a Governance Risk

Vendor Landscape: Cloud Management

Extend the Service Desk to the Enterprise

- legy and Roadmap for Office
- Strategy nprehensive Hardware Asset
- cape: Endpoint Protection
- cape: Managed File Transfer

Build an Enterprise Security Plan

Recovery

Implement a Shared Services Model

Outsource IT Infrastructure to Improve

Firewall

System Availability Reliability and

- ng with a Strategy and er-Expanding Puzzle of End-
- cape: Data Loss Prevention
- sset Management and Audit Hassles through
- isiness Alignment through an
- ų

to a Capacity-as-a-Service Strategy

Stop Just Managing Capacity by Moving

Desk Software

Exploit Disruptive Security Trends for 2015

Vendor Landscape: Mid-Market Service

Prepare for a DRP Audit Manage Help Desk Staffing

Make Sure the DRP is Ready for a Disaster

Some examples include: cloud computing, cloud storage, the latest offerings from Microsoft, data management, mobile device management, IT governance, and project management.	Our research planning methodology incorporates new and emerging technologies while soliciting member feedback to ensure our research agenda covers the topics that matter most.	All of our project Blueprints, tool, templates, and other deliverables are easily found via the Info-Tech website.	All topics covered in our Blueprints are organized into four research silos – Applications, Infrastructure, Management & Governance, and Talent & Leadership – and then are further categorized based on more specific areas of IT such as Information Management, Network & Communications, or Innovation.	Research is designed to be action-oriented and outcome- driven, for example building an effective process for mobile device management.	Info-Tech's research is written based on observed best practices, key implementation steps, world-class research, years of expertise, and encompasses a broad range of technology topics that provide a base knowledge for all technology leaders.	Research Methodology	DATA-DRIVEN INSIGHT PROGRAM
			Insight and product knowledge of our analysts	being New technologies or processes that are adopted in the market	At Info-Tech Research Group, our research agenda is driven by three factors: Projects our clients are working on		Step 5 🌣



#### Step 5 🗘

### **Research Process**

The quality and credibility of the advice and recommendations contained in our bestpractice research is of the utmost importance to Info. Tech. Each research project follows the same approach to ensure that sound research and analysis practices have been

#### Stage 1 - Project Approval

Each best-practice project Blueprint starts as a proposal for the Research Agenda. The project proposal outlines scope, client challenge, and client value. Each proposal is reviewed by a panel comprised of lead analysts, research management, and Info-Tech executives.

### Stage 2 - Scope Refinement

The project team – comprised of lead, senior, and junior analysts – contacts clients and noted experts in the field. Clients are interviewed to clarify specific challenges and identify expectations for how the research would be of greatest value. Experts, including consultants, practitioners, academics, and authors, are contacted to understand leading opinions and practices. Secondary research is conducted by the team to determine the current schools of thought about best practices. With this information, the project team develops a draft point of view and set of hypotheses around best practices and insights that will be further developed during the course of the project.

#### Stage 3 – Analysis

Through additional analysis, hypotheses developed in Stage 2 are validated or refuted. The best-practice Blueprint, including the supporting tools and templates, and the workshop are developed. Research teams test conclusions and recommendations, and associated tools, with clients and experts who have agreed to provide feedback on project results.

Content Review: Weekly, research results and documents are reviewed with the research management team. The purpose of this review is to challenge and strengthen conclusions, explanations, and recommendations.

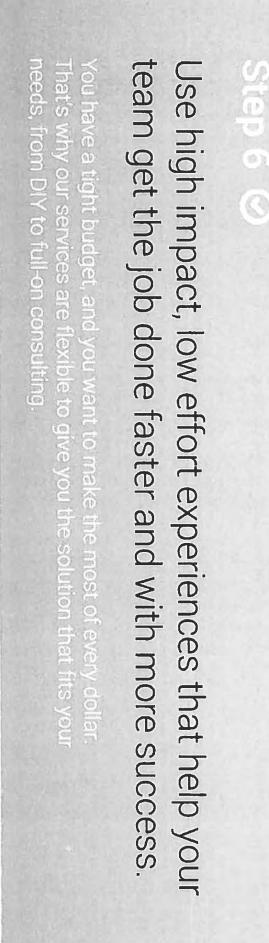
#### Stage 4 - Road-Testing

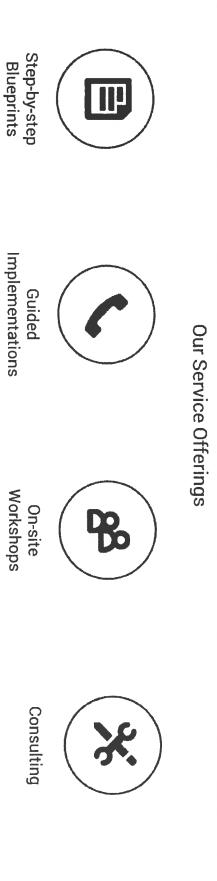
During project development, we test our research by engaging clients in on-site workshops. The feedback gathered in this workshop is incorporated into the final product.

#### Stage 5 - Executive Review

Once the best-practice Blueprint is complete, it is submitted for executive review. A panel of lead analysts, research management, and Info-Tech executives score the Blueprint to ensure the following:

- The recommended project steps are adequately supported by primary and secondary research
- The research insight is applicable to the target client group
- The recommendations are actionable and will yield measurable results
- The best-practice Blueprint offers tangible value for clients





### Step 6 🛇

Average Measured Value

\$20

## Become a Strategic CIO

Guided

Example Timeline

			octored a	N		Launch		
Call 1	Call 2	Call 1	Call 2	Call 1	Call 3	Call 2	Call 1	Gall
Track your Development	Manage your Stakeholders	Take Control of your Development	Evaluate Business Stakeholder Relationships	Evaluate Strategic CIO Competencies	Gather Information	Assess Business Stakeholder Satisfaction	Analyze Competencies	Activities

to help you execute best-practices and stay on schedule.

For every project you start, we have an expert analyst waiting

Expert Analyst Access

On-call industry experts to help you and your team finish your projects on time with more success.

Implementations

Randy Hearn Director of Research



Suanne McGrath-Kelly Senior Director

Call 2

Revise & Re-evaluate your Personal Development Plan

INFO~TECH

andor Landscape topics are chosen based on market and ember demand, and Info-Tech works with the individual indors to gain an in-depth knowledge of that particular solution. Content and Email Archiving   for Tech firmly believes in providing unbiased research: erefore, all Vendor Landscapes are written from a staunch inspective of objectivity. Vendor Email Archiving   hat's Included: A matrix that enables clients to adjust vendor rankings based on the features and offerings that are most important to them. Image: Market and Market and Explains how vendor rankings are broken down, Beviews each vendor and solution considered in the Vendor Landscape. Image: Market and Market and Mark	Currently you select the right technology solution updated annually or as medded         Curadsope topics are chosen based on market and er demand, and info-Tech works with the individual stogan an indepth knowledge of that particular solution. citize of objectivity.       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DATA-DRIVEN INSIGHT PROGRAM

# Contract Negotiation Secure the right deal an

Send your purchase or renewal contracts (e.g. Microsoft, SAN storage, data center co-location) to our analysts so that we can review the contract, identify business risks, and provide insights.

Through a phone consultation, our analysts provide you with tailored insight into potential savings, compliance issues, appropriate feature options, and general best-practice tips for your contract negotiation process.

Unlike other vendors, Info-Tech does not take a percentage of any savings realized from this service or charge an additional fee for this valuable service.

After your call, we send a follow-up report to summarize the review and provide any additional advice we may have.

Document review calls are scheduled, one-hour calls but can be extended into a series of calls depending on the scope of the review. Document reviews include procurement agreements, business plans, and requests for proposal.

# Savings Found

\$48,625,550

Specs and Feature Guidance You Need Discount Levels Terms of Service Cost per Unit Licensing traphaght discount negotiation opportunities in terms of institutional program of channes (iscount)s Henrow proposed hardwork specshCOTS software capabilities to validate solution design meets needs without overcluikding. Determine the licensing acquicater in terms of number hipse and program to teduce costs of maggine noise identify gaps and opportunities regarding proposed integrations installiotion service-plans/revels customication details and risks Specify Rem or Unit-level cost negatimiton ວ່ານວ່າການານແຂະ 날 - Microsoft 크 - Data Center Co-Loczbon 23 - Disch and Entertvise Networks 그나 Silv Stocage **Top Purchases Optimized** How Info-Tech Helps Our analysts relievieedh purchase against these criter a Each technology purchase requires a blend of insight across these elements First "stay **Get Started** 

Step 7 & Measure Year-Over-Year Improvement Utilize a Measurable & Systematic approach to Improving your IT department.	Stop justifying your spending & start getting credit for the value your team delivers.	DATA-DRIVEN INSIGHT PROGRAM
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### Table of Contents - Exhibit B - McLean & Company Services Pricing

## 1.0 Membership Pricing

MHEC Membership Pricing

Membership Overview

### 2.0 Executive Summary

About Us

How We Deliver

Systematically Improve IT Performance

### 3.0 Systematically Improve HR Performance

Key Initiative Plan

Membership Overview

## 1.0 MHEC McLean Membership Pricing

# of Advisory Seats	# of Reference Seats & Web Access (Additional Reference Seats \$100/month per seat less 5%)	Investment	Annual Onsite (Strategy Workshop Membership
1 seat (available only to companies with less than 1000 employees)	Up to 9	\$1000/Month less 5%	
2 seats	Up to 18	\$2000/Month less 5%	+\$1000/Month less 2%
3 seats	Up to 27	\$3000/Month less 5%	1085 2 /0
4 seats	Up to 36	\$4000/Month less 5%	
5 seats	Up to 45	\$5000/Month less 5%	
6 seats	Up to 54	\$6000/Month less 5%	
7 seats	Up to 63	\$7000/Month less 5%	
8 seats	Up to 72	\$8000/Month less 5%	
Custom	Custom	Custom	

- Content is not restricted by seat type & programs can be customized to teams needs
- Core Diagnostics are included with all Advisory Seat levels: HR Stakeholder Management, HR Management & Governance, 360 Degree Feedback, Mickean Leadership Index
- New Hire, Full Engagement Survey and Exit Survey are included for up to 5080 employees for each Advisory seat
- Prices include standard surveys; customization can be done at an extra fee
- LEAP Seats can be used in lieu of an Advisory seat holder or purchased for \$600
- Price Escalation: The parties agree that the annual price increase, as defined as effective date, that affects the MHEC Price shall not exceed 5% or the United Sta

## **1.0 MEMBERSHIP OVERVIEW**

## Reference Seat Features



ſ

**Core Project Research &** 

Instructional blueprints for Thought Leadership implementing proven methodologies.

**Role-Based Research** CHRO

**Talent Acquisition** 

Learning & Development

**Talent Management** 

**Total Compensation** 



**HR Best-practices Research & Training** 

ሐ	HR Framework	A comprehensive, connected methodology for improving core HR processes.
俞	Management Training	Access to our management training modules and materials to develop high-impact leaders.
ē	On-Demand Webinars	A full library of webinars available any time across core HR functions.
	Additional Feature	25
P	Tools & Templates	Powerful tools and ready-made templates to help your team identify what's wrong and take action.
1	Job Descriptions and Policies Library	Discover our extensive library of job descriptions and policy templates

A semiconclusion composited

## Advisory Seat Features

Includes all Reference Membership features, in addition to:

#### Systematic HR Improvement Program

ଦ୍ର	Key Initiative Plans	Continually increase business satisfaction with step-by-step roadmaps catering to every area of HR.
<b>V</b>	Quarterly Research Calls	Create real improvements over your membership through scheduled progress calls with your dedicated research analysts.
8	Dedicated Account Manager	Your dedicated Account manager will ensure you get the most value from your membership.
	Guided Implementations	Our on-call industry experts help you and your team finish projects on time and with better results.



360 Degree Feedback

McLean

Employee

New Hire

Exit

Engagement

**Policies Library** 

The simplest way to collect data and develop actionable insights.

descriptions and policy templates.

HR Stakeholder Management	Designed to help you understand the business needs and measure satisfaction.
HR Management & Governance	Achieve HR-business alignment using stakeholder perspectives and priorities.
360 Degree	Improve employee development and

performance.

A single question that delivers powerful leadership feedback correlated to Leadership Index™ employee engagement.

> Systematically measure and improve employee engagement.

Understand first impressions to improve future recruiting, onboarding, and training initiatives.

Identify trends and address issues leading to employee departure.



## 2.0 ABOUT US

McLean & Company is a rapidly growing HR Research and Advisory organization, proudly serving over 30,000 professionals worldwide. Our focus and mission is driven by the insights and challenges of our member base. We help HR leaders make strategic, timely, and well informed decisions and then implement high-impact solutions.

McLean & Company is a division of Info-Tech Research Group Inc., an organization that provides research, advisory and professional services to HR and IT organizations.

Our team of Analysts provides support throughout every stage, from situation analysis, strategic and program planning, implementation and measurement of outcomes.

We pride ourselves on offering insight that pushes beyond HR and can help guide strategy and operations in your company – helping you to build company-wide solutions, implement programs, plan for change, and achieve long-term business goals.

HR leaders and their teams select McLean & Company to:

- Drive business-critical talent innovations
- Systematically improve their core processes and governance
- Successfully implement critical Human Capital projects

#### The McLean Advantage

Our Evidence-Based Insight Program enables HR organizations to objectively measure their performance, develop key initiative plans with role-based roadmaps, access our innovative research and industry experts, and systematically improve performance year over year.

We move beyond reports, providing in-person experiences and expertise that drive sustainable HR improvement.

We partner closely with HR teams to provide everything they need – from actionable tools to in-person analyst guidance – to deliver measurable results for their organizations.

"We all want to improve our ability to make a positive contribution to our respective businesses. McLean & Company supplies the tools HR needs from start to finish on every project or endeavor a Human Resources Department is looking to embark upon. Whether you are beginning your journey or retooling the way you do things, McLean provides way more than a cursory overview or opinion, it provides the all-important 'How To'!"

Arvelia Bowie Vice President of HR Torchmark Gorporation



## 3.0 A STEP BY STEP **PROGRAM TO SYSTEMATICALLY** IMPROVE HR PERFORMANCE

Objectively Measure and Drive HR Performance across the Organization with our Evidence-Based Insights Program



#### Establish HR Performance Measurement

Manage Core HR Processes

Sites? ?

Build an Evidence-Based Strategy P. P. Barris A.

Create Roadmaps for Key HR Executives

#### 50.5

#### Measure Year-Over-Year Improvement

Objective by the state of the socontrol control of tearment it endership at your fam

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#### Leverage Executive Coaching Throughout the Year

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#### Use Tools and Best Practices for Key Projects

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#### **DIY Toolkit**



"Our team has already made this critical project a priority, and we have the time and capability, but some guidance along the way would be helpful."

#### Guided Implementation



"Our team knows that we need to fix a process, but we need assistance to determine where to focus. Some check-ins along the way would help keep us on track."

#### Workshop



"We need to get this project kicked off immediately. Our team has the ability to take this over once we get a framework and strategy in place."

#### Consulting



"Our team does not have the time or the knowledge to take this project on. We need assistance through the entirety of this project."



## McLean & Company's Key Initiative Plan

Our tailored roadmaps set you on a path to improve the capabilities that actually matter to your business

#### EVIDENCE-BASED INSIGHT PROGRAM

#### MEASURE KEY INITIATIVE PLAN



#### EVIDENCE-BASED INSIGHT PROGRAM

#### CHRO KEY INITIATIVE PLAN

#### 🕞 Step 1 🔟

Strategy

#### Step 2

#### **Effectively Manage Stakeholders**

Stop guessing about stakeholders' needs and priorities, invite regular feedback to increase trust and strategie cellaboration screes the organization. Step 3 Lul

#### **Optimize the HR Department**

Enhance your 149 departmental arcestant, process to cheology, and capability to successfully execute high value strategic initiatives.

#### 🕒 Step 4 🔟

#### **Build HR Capabilities**

**Build an Integrated People** 

An integrated people strategy notionly supports but threes organizational goals, reasonizing the human capital contribution to the bottom line

Ensure competencies and napacity memory in time to meet strategin goals and understand what matters when reflesigning HP.

#### Step 5 🛄

#### Promote a Consistent Culture

Don't let a confusing outched nave you, employees in diserray

#### Step 6 Lul

#### Design an Employee Value Proposition

Develop an accurate aligned, and aspirational DV to reinferce your talent management strategy and differentialic yourself from key competitors

#### Step 7

Manage Conflict in the C-Suite

Ensuring that your C-suite has a healthy team dynamic will translate into success for all levels of the orthonization.

#### McLEAN & \_\_COMPANY

#### Step 8 Id

#### Develop as an effective CHRO

Ci-ROs are often the "shaemekar's children" when it comes to clevelopment, they must make the time its invisit in developing theoretives

#### Step 9 🔟

#### **Leverage Analytics**

Concrete months from HB data through a companying of HD analytics and persuasive storyte ling.

#### EVIDENCE-BASED INSIGHT PROGRAM



**Retain Key Talent** 

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#### Step 8 III

**Develop an Inclusive** Organization, An inclusive culture on the key to unlesson the

#### EVIDENCE-BASED INSIGHT PROGRAM

#### Step 1 🔟

**Develop a Strategic** Workforce Plan

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#### Step 2 🔟

**Create a Talent Acquisition** Strategy

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TALENT ACQUISITION KEY INITIATIVE PLAN

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Design an Employee Value Proposition

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#### 🕲 Step 4 🔟

#### Improve Internal Talent Mobility

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#### Step 5 Ill

#### Source Qualified Candidates

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Step 6 III

#### **Assess Candidates**

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#### 🕒 Step 7 🔟

Improve the Candidate Experience

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#### Step 8 ull

#### **Develop a Social Media** Ambassador Program

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#### Step 9 Jal

Assess Recruitment Process Outsourcing

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## MELEANS

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Leverage analytics

#### EVIDENCE-BASED INSIGHT PROGRAM

## TOTAL REWARDS



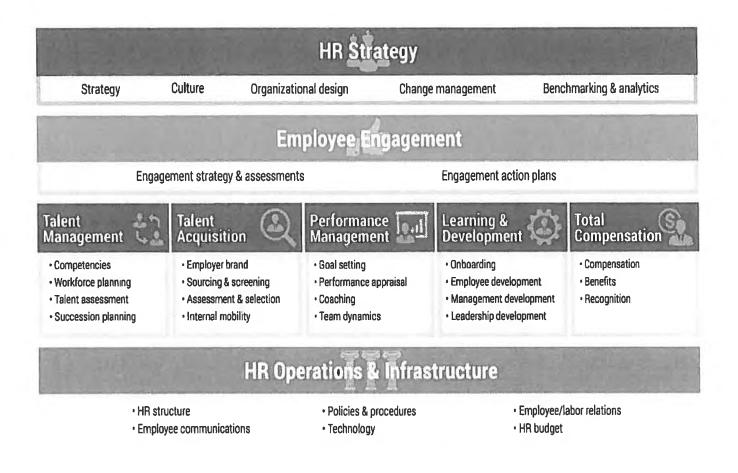
## **ADVISORY MEMBERSHIP**

## **Best Practice Research**

Improve knowledge sharing and training with consistent tools and resources from the McLean & Company library for your entire team available at their fingertips.

Provide McLean & Company's best-practice research to your team so they can spend less time hunting for resources by using comprehensive solutions specific to the project at hand. Your team will stay consistent with proven methodologies that keep everyone on the same page from project start to end, making knowledge sharing and training easier than ever.

Our research and advisory covers the wide range of HR's core services, as seen below, to accommodate the rapidly changing HR landscape.





#### **Blueprints**

Our research is built around a tool-based model, called Blueprints, which incorporate analysis, advice and the tools you need to get things done. Blueprints connect the tasks within the context of the project, so you can jump in at any point and easily find the right tools.

We publish new research weekly to provide you with coverage of the HR issues you're facing on a daily basis. With each Blueprint published, 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 in one convenient location.



Example Blueprint Modernize the Performance Appraisal

#### **Management Training Modules**

Ongoing training is crucial in advancing the professional development goals of your managers. McLean & Company's management training modules are storyboards that are designed to facilitate management training workshops. From Effectively Resolving Conflicts to Leading Staff through Change, these modules can turn your management team into world class leaders. They come fully equipped with a presentation deck, agenda, facilitator notes, interactive exercises and handouts.

#### **Training Decks**

Performance Management

Train Managers to Instill a Mindset of Personal Accountability

Performance Management Train and encourage personal accountability to increase engagement and, ultimately, productivity and profitability.



Your McLean & Company Membership can also help you design, build, and deploy a management development program effectively to your managers.



## **Guided Implementations**

We're your HR partner, providing insights and advice on any business situation.



Your McLean & Company Advisory membership gives you access to the expertise of our entire team of consulting analysts via phone or email. Our consulting analysts are available to you for any business, HR, or management situation.

Rely on our experienced consulting analysts when you:

- Need to validate your decisions or discuss the best direction for an HR project or process.
- Want assistance getting the buy-in from other members of your organization.
- Require an objective third-party to answer your HR, business and/or strategy concerns.

Your account manager works with you to understand your situation and pairs you with a consulting analyst that is knowledgeable and experienced in your area of need. Your consulting analyst will continue to monitor your progress and touch base throughout your project to ensure you are getting the results you expect.

On-call industry experts to help you and your team finish your projects on time with more success.

## Expert Analyst Access

For every project you start, we have an expert analyst waiting to help you execute bestpractices and stay on schedule.

# Example proposed call schedule from: Develop a Strong EVP to Attract Top Talent Guided Implementation This guided implementation is a five call advisory process. Guided Implementation #1 - Uncover the EVP

Call #1: Review HR's role in creating the EVP and employer brand.
 Call #2: Gain advice on collecting data from multiple sources.
 Guided Implementation #2 - Road-test the EVP
 Call #1: Discuss how to test the EVP with internal and external groups.
 Guided Implementation #3 - Adopt the EVP
 Call #1: Gain advice on how to align HR policies and programs with the EVP.
 Guided Implementation #4 - Launch the EVP and employer brand
 Call #1: Review the internal and external marketing strategies for promoting the EVP and employer brand.

Schedule Your First Call



## Full Diagnostic Suite

Turn employee feedback into actions that transform and drive performance.

McLean & Company analysts take care of the survey design, data collection, analysis, and reporting for you. McLean & Company will identify the top 3–5 areas of improvement on which you should focus and work with you to develop initiatives that generate the most impact based on your results.

Our surveys are easy to use and understand for participants and the end-users. We provide a synthesis of findings in a custom report prepared by one of our consulting analysts. Attractive and streamlined graphics highlight key insights and Excel reports with segmented results break down the data even further, by each demographic group.

#### McLean & Company's Full Diagnostic Suite

#### HR Stakeholder Alignment

Stakeholder management is a critical aspect of running a successful HR department. Make sure you are aligned with the business needs by using our stakeholder survey.

#### **HR Management and Governance**

Gather information on HR processes so that you can start the process improvement journey. Use our management and governance diagnostic to uncover opportunities within the HR department.

#### New Hires

Leverage first impressions for future recruiting, on-boarding, and training initiatives. Use a newhire survey to ensure that talent is properly on-boarded, and identify issues that disrupt the engagement of new hires.

#### Voluntary Exits

When off-boarding employees, provide your departing employee with a confidential Exit Survey, which will better allow you to identify trends and address issues leading to employee departure.

#### 360 Degree Feedback

In today's workforce, employees are requesting more development than ever before. A well designed 360 Degree Feedback Program is a critical building block of an organization's talent development strategy.

#### Employee Engagement & MLI

Go beyond job satisfaction and find out what drives employee productivity. We take a multi-leveled approach to tackle engagement from surveying, to reporting, to implementing best practices.







Strategy

#### Employee Engagement Survey

Engaged employees do what's best for the organization: they come up with product/service improvements, provide exceptional service to customers, consistently exceed performance expectations, and make efficient use of their time and resources. The result is happy customers, better products/services, and saved costs.

McLean & Company's Employee Engagement Survey Program provides you with all the tools required to effectively collect employee feedback, identify sources of disengagement, and take action to improve engagement.

#### McLean & Company's Engagement Survey Methodology

McLean & Company has developed a survey methodology backed by years of research to capture accurate and relevant data. Our program methodology considers multiple factors and drivers of engagement:

**Job Engagement**: Distinct levers that increase an employee's engagement with their job. These drivers are employee empowerment, manager relationships, rewards and recognition, learning and development and co-worker relationships.

**Organizational Engagement**: Distinct levers that increase an employee's engagement with the overall organization. These drivers are organizational culture, senior management relationships, customer focus, department relationships and company potential.

**Retention**: Minimum requirements for engagement which, while necessary, cannot drive employee engagement in the absence of other drivers. These drivers are compensation, benefits, work-life balance, and working environment.

The engagement survey is a series of questions designed to measure each individual driver. Results are presented by question and by driver, yielding a high-level analysis.

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		1		Organizationa Engagement
		Employee Empor	worment	Culture
	Learn	Ing and Developme	ont C	ustomer Focus
1.5	Rewards an	d Recognition	Com	pany Potential
1.6	Co-worker Relati	onships	Departmen	nt Relationships
Mone	iger Relationship	s Se	enlor Managem	ent Relationships
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#### **End-user Experience**

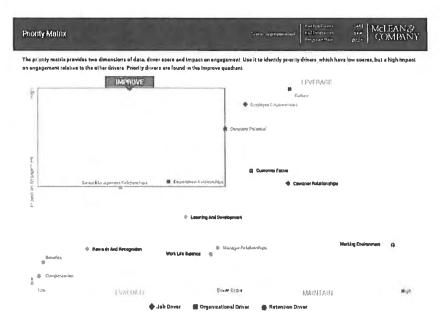
The survey is easy to use and understand for the end-user. We provide you with a test survey well in advance of the launch so that all stakeholders can review and provide revisions. End users are encouraged to reply with any questions when filling out the survey to a point of contact at McLean & Company.

Each employee is assigned a personalized survey link, which is sent via email. This enables us to keep track of employees who start but do not finish the survey, those who do not start the survey at all, and those who complete the survey. It also enables us to match the results to each employee's demographics without having to ask the employees those questions. For employees who do not have access to a computer, or if you require surveys in another language, please speak to your McLean & Company representative for details on fees.

#### **Reporting Capabilities**

McLean & Company provides a synthesis of findings in a custom report prepared by one of our consulting analysts. The report contains graphs highlighting key insights gained from the survey and you will receive Excel reports with results segmented by each demographic group. You can view a sample report <u>here</u>.

Additionally, an engagement driver prioritization grid is included in each report. The grid compares each driver's score (i.e. Manager Relationships) to that driver's impact on engagement. Using this grid, McLean & Company will work with you to identify priority areas to target.



McLean & Company's Employee Engagement Program also includes reporting by manager. The engagement survey will provide your organization with insight into whether your managers:

- Help employees understand what is expected of them.
- Develop employee career paths.
- Inspire employees to improve.
- Help employees to achieve better results.

This element of the engagement program will provide additional insight into development and coaching opportunities for current managers.



#### **Excel Reports**

Excel reports include overall engagement, job engagement and organizational engagement scores, as well as overall scores for each driver and question. This information is listed down the side of the report. Each demographic group is listed along the top of the report. Scores are highlighted by color to demonstrate strong, mediocre and concerning areas.

#### **Detail of Employee Engagement Services Included**

#### **Project Planning**

- A work plan and project team with a designated project manager.
- Work with your IT staff to enable effective and secure access to the survey via the Internet.
- Security and protection of the data throughout all phases of administration, analyses, reporting and post-survey follow-up.
- Development of an employee communication plan for pre-survey notification, reminders and postsurvey follow-up.

#### Survey Development and Delivery

- The guarantee of complete anonymity and use of secure survey platform to the respondents.
- Availability of personnel to handle any troubleshooting or issues that arise during the survey.
- Tracking of response rates by department with updates per your preference and reminder emails sent to employees as necessary.

#### **Survey Analysis and Reporting**

- Analysis, segmentation, and benchmarking of data in detailed reports.
- Results by manager for those with sufficient number of staff.
- Summarization of employee comments to open-ended questions.
- Department level access to employee comments for those departments with 10+ employees.

#### **Change Initiatives and Action Planning**

- Recommend follow-up initiatives and subsequent survey actions based on the findings.
- Action planning support based on analysis with clear short, medium, and long-term change targets.
- Phone facilitation of discussion and follow-up decision making meetings.

#### **Onsite Engagement Workshop (Optional)**

Many organizations launch employee engagement surveys, but only a fraction move beyond measuring to actually improving engagement. McLean & Company's Employee Engagement Workshop acts as the kick off point to an engagement program that lasts all year.

#### Sample engagement workshop:

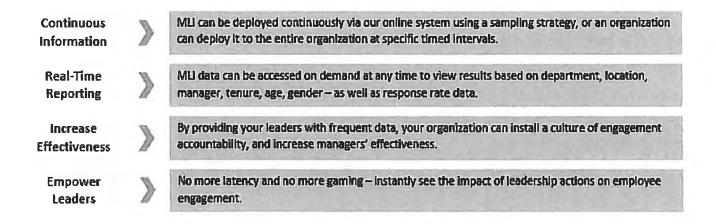
Day 1 - Preparation	Day 2 - Workshop	Day 3- Workshop	Day 4 - Workshop	Day 5 - Debrief
<b>'orkshop Preparation</b> Engagement survey completion Results presentation to HR Determine make up for employee focus groups	<ul> <li>Morning Itinerary</li> <li>Results presentation to senior executives</li> <li>Review agenda for action planning</li> <li>Prioritize drivers for action planning</li> <li>Afternoon Itinerary</li> <li>Results presentation and training to managers on their role and leading feedback sessions</li> </ul>	Morning Itinerary • Employee focus group Afternoon Itinerary • Employee focus group	<ul> <li>Morning Itlnerary</li> <li>Review and prioritize employee initiatives</li> <li>Build action plans</li> <li>Afternoon Itlnerary</li> <li>Identify key communication messages</li> <li>Build communication plan</li> </ul>	<ul> <li>Workshop Debrief</li> <li>Provide summary report and additional resources for action plans</li> <li>Next Steps for client</li> <li>Communicate to employees regarding action plans</li> <li>Managers to host department feedbacl sessions</li> </ul>



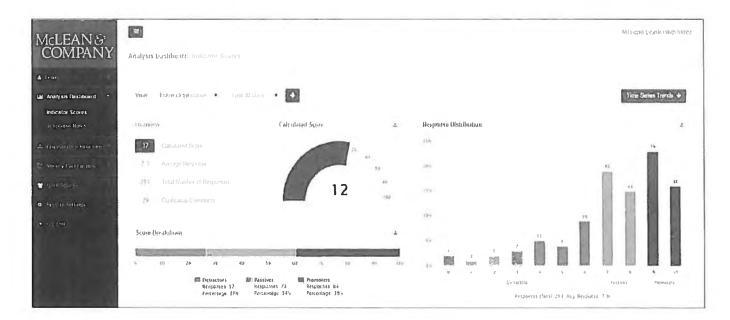
#### McLean Leadership Index™

The McLean Leadership Index<sup>™</sup> (MLI) is a single question that is highly correlated to engagement and overall financial results. Using a high frequency, low effort, high impact pulse survey, we help organizations recalibrate the purpose, cadence, and focus of engagement.

Furthermore, we look at factors that will help impact employee engagement beyond marginal increments year-to-year, and help benchmark the effectiveness of leaders across the organization, based on the engagement of their business units and team.



The MLI tool provides a unique dashboard, accessible by HR and management, to see changes in engagement as they happen in real time. This dashboard, accessible online and via mobile devices, also allows managers to benchmark the effectiveness of their leadership, based on their team's engagement, in comparison to other managers and business units.





### New Hire Survey

Recruiting, training, and retaining top talent is an ongoing challenge for HR Professionals. Investing the time and analysis in onboarding a new hire is critical to long term talent management success. A New Hire Survey is a short questionnaire administered to employees hired within the past three to six months.

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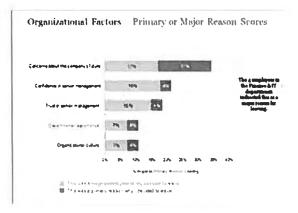
- The survey gains insight into employees' perceptions of the organization's recruiting efforts, the interviewing process, onboarding program, their manager and the organizational culture.
- Every three to six months, the data is collected, cleansed, analyzed and reported.
- An analyst will schedule a phone consultation to discuss initiatives that can help you improve your recruiting and new hire experience in the short and long term.

#### **Employee Exit Survey**

Understanding why people want to leave your organization in the first place is crucial to making others want to stay for the long run. People leave for a wide range of reasons, and some of these reasons are entirely fixable on your organization's part.

Administer McLean & Company's Employee Exit Survey at the time of employee departure to determine how you can prevent regrettable turnover in the future. Your membership includes access to the survey plus one-on-one analyst access to discuss your Employee Exit Survey results.

- The survey gains insight into employees' real reasons behind leaving the organization.
- Depending on your preference, the data is collected, cleansed, analyzed and reported every three months, six months or annually.

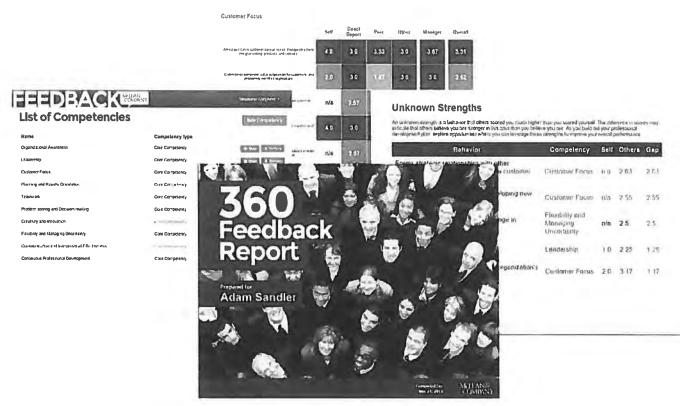




### 360 Degree Feedback Tool

In order to be successful in today's workforce, employees are requesting more development than ever before. A well-designed 360 Degree Feedback Program is a critical building block of an organization's talent development strategy. 360 degree feedback benefits the employee by providing a multi-faceted view on key competencies so that they can develop for the future. With the right elements in place, 360 Degree Feedback Programs can significantly improve employee development, performance, and as a result, the organization as a whole.

Our online 360 Degree Feedback Tool reduces the administrative burden of 360 Degree Feedback Programs and ensures confidentiality of the data.



McLean & Company's 360 Degree Feedback Tool is easy to use and largely employee-driven once the initial set up is complete.

- HR can select from McLean & Company's pre-defined competencies or you can add in your own competencies.
- HR assigns a required proficiency level in each competency to specific job roles in your organization.
- The tool allows for quantitative feedback through numerical ratings of the competencies and qualitative feedback recommendations on how to use or develop each competency to achieve greater levels of proficiency.
- Confidentiality is guaranteed as McLean & Company compiles the feedback report once a threshold of three respondents per rater group is met.



### HR Stakeholder Management Survey

Understanding the needs of your stakeholders is critical to effective stakeholder management, and running a successful HR department.

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McLean & Company's HR Stakeholder Management Survey is an insightful business satisfaction and value measurement program. It helps you kick-start the Stakeholder Management Process by surveying business leaders quickly and painlessly using our expert framework, identifying key areas of demand, and establishing greater credibility & business alignment by leveraging our advisors every step of the way to improve stakeholder satisfaction.

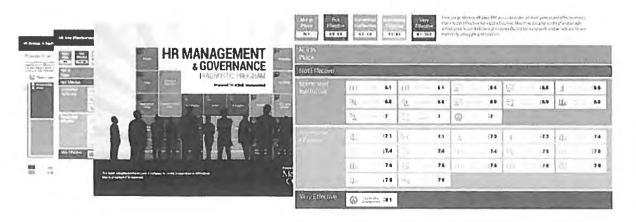
Use insights from this program to:

- Find out what is most important to the business and to key stakeholders.
- Build credibility within your organization.
- Improve interactions with key stakeholders.
- Focus on what's most important to your organization.
- Get the most value out of HR resources.

Aligning HR's goals with those of the business is essential for HR departmental optimization and overall success.



### HR Management & Governance Diagnostic



The development and maintenance of core HR functions are important components of any HR leader's role. Project successes and failures are impacted by the strength of the underlying core HR functions. This tool helps you:

#### **Understand Results**

- Get a clear understanding of the areas that affect your HR department's ability to fulfill HR and business goals.
- Understand your team's perception of each area's importance and effectiveness.
- Identify where the gaps exist between your team members' area scores to see where there are differences in opinion.

#### Establish Clear Accountabilities & Responsibilities for Key Areas

- Build a plan to ensure clear accountability.
- Ensure key HR leaders are not overwhelmed with accountability.
- Create a plan to engage a broader team with area accountability.

#### **Book & Conduct a Team Alignment Exercise**

- Gather your team and discuss the discrepancies for the areas with the greatest gaps in scores.
- Bring the entire team to consensus regarding which areas are the most important and which areas are the least effective.
- Establish area owners for each HR area. Each relevant area must have at least one person accountable for it.
- Monitoring and improvement initiatives.

#### Create a Roadmap of Key Areas to Improve

- Once your team has reached a consensus on which areas to focus on, create an area improvement roadmap outlining which areas your team will focus on over the next 12 months.
- Determine concrete responsibilities and timelines, as well as regular checkpoints with your team to monitor progress.



#### Master Consulting Agreement between MHEC and Info-Tech Research Group

This Agreement is made between the Midwestern Higher Education Commission ("MHEC") located at 105 5<sup>th</sup> Ave. S., Suite 450 Minneapolis, MN 55401, on behalf of the Eligible Organizations located in the MHEC Member States, and Info-Tech Research Group ('Info-Tech") located at 602 Queens Ave., London, ON, Canada N6B 1Y8. For purposes of this Master Agreement MHEC and Info-Tech are referred to collectively as the "Parties" or individually as "Party".

Whereas, the Midwestern Higher Education Compact ("Compact") is an interstate compact of twelve Midwestern states, such states being Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, South Dakota and Wisconsin ("Member States"); and MHEC, a nonprofit 501(c) (3), is a statutorily created governing body of the Compact established for the purposes, in part, of determining, negotiating and providing quality and affordable services for the Member States; the entities in those Member States, and the citizens residing in those Member States; and

Whereas, MHEC has established a Technology Initiative the purpose of which is to determine, negotiate and make available quality and affordable technology products and services to the not-for-profit and public education related entities in the MHEC Member States; and

Whereas, Info-Tech offers certain quality technology related research products and services; and

Whereas, MHEC conducted a competitive process for technology related research products and services, and upon completion of the competitive process awarded a bid to Info-Tec; and

**Therefore**, in consideration of mutual covenants, conditions, and promises contained herein, MHEC and Info-Tech agree as follows:

- 1. **Eligible Organizations**: This Master Agreement shall be made available to all Eligible Organizations. Eligible Organizations shall include:
  - all not-for-profit private and public institutions and/or systems of higher education (colleges, universities, community colleges, technical institutions and equivalent institutions) located in a Member State;
  - all K-12 schools and school districts located in a Member State;
  - any state, city, county or local governmental entity in a Member State.
  - any not-for-profit private and public institutions and/or systems of higher education (colleges, universities, community colleges, technical institutions and equivalent institutions), K-12 school or school district, or state, city, county or local governmental entity located in the Western

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Interstate Commission for Higher Education (WICHE) Member States including: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Neveada, New Mexico, North Dakota\*, Oregan, South Dakota\*, Utah, Washington and Wyoming. \* The Dakotas are members of both compacts – MHEC and WICHE.

- Eligible Organizations located in a Member State that terminates its association with the Compact will no longer be eligible under this Master Agreement to purchase pursuant to this Master Agreement. Termination by any Member State shall not prohibit or restrict Info-Tech from negotiating or contracting with such Member State or entity within such Member State outside the Compact. MHEC shall promptly notify Info-Tech in writing of the termination of any Member States' membership in the Compact. If any Member State so terminates its membership in the Compact, such termination shall not effect the validity or enforceability of or constitute a default under any purchase order then in effect with any Participant. Similarly, MHEC shall promptly notify Info-Tech if other states join the Compact after which such states shall be deemed to be Member States for purposes of this Master Agreement.
- 2. Scope of Work: Procuring Eligible Organizations shall purchase from Info-Tech, and Info-Tech shall provide to Procuring Eligible Organizations Research and Advisory Services ("Services") in accordance with the terms of this Master Agreement.. All Eligible Organizations are qualified to purchase under this Master Agreement, including those Eligible Organizations currently under a separate agreement with Info-Tech. This Master Agreement is a price agreement. Accordingly, Info-Tech shall provide Services only upon Eligible Organization's issuance of a valid Purchase Order with reference to this Master Agreement and completion of a valid Service Agreement (SA) Exhibit B. Prices for the Services shall conform to the Price List attached as Exhibit A. Info-Tech is solely responsible for fulfillment of the responsibilities under the terms and conditions of this Master Agreement and SA. MHEC shall not be liable for any Eligible Organization that enters into a SA with Info-Tech under this Master Agreement. An Eligible Organization shall not be responsible for any other Eligible Organization that enters its own SA under this Master Agreement.
- 3. **Purchase of Services**: Procuring Eligible Organization shall purchase Services from Info-Tech as is more specifically outlined and designated in Price List Exhibit A and SA Exhibit B. The Purchase Order and SA shall set forth the Services being purchased, any additional contract terms agreed to by Procuring Eligible Organization and Info-Tech, and the applicable fees. Procuring Eligible Organization and Info-Tech shall enter into one or more SA's with each Purchase Order referencing this Master Agreement. This Master Agreement shall apply to all current and future Services provided to Procuring Eligible Organization by Info-Tech, unless the Agreement is terminated pursuant to Section 6 of this Master Agreement.

4. Order of Precedence: Where the terms and conditions of this Master Agreement are in conflict with an Eligible Organization's state and/or institutional laws or regulations, the Eligible Organization and Info-Tech may enter into an addendum to amend the terms and conditions of the Master Agreement in the SA Exhibit B to conform to the Eligible Organization's state and/or institutional laws or regulations. The terms and conditions of the addendum to supplement or modify this SA shall only be applicable between the Eligible Organization that entered into the SA and Info-Tech. In the event of any conflict among these documents, the following order of precedence shall apply:

A. Exhibit A to this Master Agreement, the Price List

B. Procuring Eligible Organization valid Purchase Order

C. Executed SA Exhibit B between Eligible Organization and Info-Tech

D. the terms and conditions of this Master Agreement

E. the list of Products and Services contained in the Order

F. Info-Tech's response to MHEC's IT Research and Advisory Services RFP dated October 24, 2012

5. **Term**: This Master Agreement will be formed upon execution by the Parties, and shall remain in effect, unless otherwise terminated pursuant to the terms of the Master Agreement until December 31, 2016. The Master Agreement may be mutually renewed for four (4) additional one-year terms unless terminated pursuant to the terms of this agreement.

#### 6. Termination:

A. At any time MHEC may terminate this Master Agreement, in whole or in part, by giving Info-Tech ninety (90) days written notice; provided however, neither MHEC nor Eligible Organization has the right to terminate a specific Service for convenience after it has been accessed. At any time, Info-Tech may terminate this Master Agreement, in whole or in part, by giving MHEC ninety (90) days written notice. Such termination shall not relieve Info-Tech of any Services, warranty or other obligations incurred under the terms of this Master Agreement.

B. MHEC or Info-Tech may terminate this Master Agreement for cause based upon material breach of the Master Agreement by the other party, provided that the non-breaching party shall give the breaching party written notice specifying the breach and shall afford the breaching party a reasonable opportunity to correct the breach. If within thirty (30) days after receipt of a written notice the breaching party has not corrected the breach or, in the case of a breach that cannot be corrected in thirty (30) days, begun and proceeded in good faith to correct the breach, the non-breaching party may declare the breaching party in default and terminate the agreement effective immediately. The non-breaching party shall retain any and all remedies available to it under the law.

C. In the event that either Party be adjudged insolvent or bankrupt by a court of competent jurisdiction, or upon the institution of any proceedings by or against it seeking relief, reorganization or arrangement under any laws relating to

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insolvency, or upon any assignment for the benefit of creditors, or upon the appointment of a receiver or trustee of any of its property or assets, or upon the liquidation, dissolution or winding up of its business, then and in any such event this Master Agreement may immediately be terminated or cancelled by the other Party hereto

D. Procuring Eligible Organization or Info-Tech may terminate a SA Exhibit B for cause based upon material breach of the Master Agreement and/or SA Exhibit B by the other party, provided that the non-breaching party shall give the breaching party written notice specifying the breach and shall afford the breaching party a reasonable opportunity to correct the breach. If within thirty (30) days after receipt of a written notice the breaching party has not corrected the breach or, in the case of a breach that cannot be corrected in thirty (30) days, begun and proceeded in good faith to correct the breach, the non-breaching party may declare the breaching party in default and terminate the agreement effective immediately. The non-breaching party shall retain any and all remedies available to it under the law

E. Most Info-Tech Services are available upon first access, therefore, these Services may not be cancelled at any time during the active term and may be terminated only upon material breach and thirty (30) days written notice to the other party. In the event Procuring Eligible Organization breaches this Agreement by failing to pay for Services, or by exceeding its authorized usage rights to Services, Info-Tech may deactivate Procuring Eligible Organization's access to the Services. Procuring Eligible Organization may regain access to Services by paying the full fee due for said Services in the case of failure to pay, or paying for any additional fees applicable for use of Services in excess of authorized rights.

F. In the event this Master Agreement expires or is terminated for any reason, a Procuring Eligible Organization shall retain its rights in all ongoing Services obtained through a SA Exhibit B entered into under this Master Agreement prior to the effective termination date.

- 7. Fees: The fees for the Services provided by Info-Tech shall conform to fees set forth in Exhibit A, the Price List. Prices in Exhibit A are inclusive of all duties and taxes. Invoices shall be submitted to Procuring Eligible Organization. Payments shall be remitted to the United States address shown on the invoice. All applicable Fees are payable 30 days after receipt of an invoice. Procuring Eligible Organization shall pay Info-Tech one and one half (1.5%) interest per month on all overdue accounts. All amounts are subject to payment of all applicable taxes, unless Procuring Eligible Organization supplies appropriate exemption certificates. Procuring Eligible Organization agrees to pay any taxes imposed or assessed by any governmental organization or agency upon sale or receipt of Services, with the exception of any income taxes imposed on Info-Tech.
- 8. Non Appropriation: This provision applies only to government and government educational Procuring Eligible Organizations. The terms of this

Master Agreement and any SA Exhibit B placed under this Master Agreement for multiple years is contingent upon sufficient appropriations being made by the legislature or other appropriating governing entity. Notwithstanding any language to the contrary in this Master Agreement or other document related to an order made under this Agreement, Procuring Eligible Organization may terminate its obligations under this Agreement if sufficient appropriations are not made by the governing entity to pay amounts due for multiple year agreements. The Procuring Eligible Organization's decision as to whether sufficient appropriations are available shall be accepted by Info-Tech and shall be final and are binding.

A Procuring Eligible Organization shall provide sixty (60) days' notice, if possible, of its intent to terminate this Agreement for non-appropriation. Procuring Eligible Organization shall send to Info-Tech a notice of its Governing Body's decision not to appropriate funds for the installment sale payments for the subsequent fiscal year. The notice shall also include a statement that the Procuring Eligible Organization was unsuccessful finding another assignee within its own organization to continue the installment sale payments and that the Services will not be replaced by a similar service during the ensuing fiscal year. Such termination shall relieve Procuring Eligible Organization, its officers and employees from any responsibility or liability for the payment of any future orders under the Agreement. However, all outstanding invoices from Info-Tech will be paid by the Procuring Eligible Organization.

- 9. Copyright: Info-Tech owns all copyrights and all other intellectual property or proprietary rights in any material provided by Info-Tech as part of the Services, whether written or electronic. Except as outlined in Sections 11 and 12, Procuring Eligible Organization shall not directly or indirectly copy, reproduce, or create derivative works of Services and may not resell or allow its use by any third parties in whole or in part without the express written consent of Info-Tech.
- 10. Changes to Services: Info-Tech may change or discontinue any aspect of its Services at any time, including content or features. Info-Tech also reserves the right to change the terms and conditions applicable to use of the Services. Such changes shall be effective immediately upon notice. After receipt of notice, use of the Services by Procuring Eligible Organization shall be deemed to be acceptance of such changes. Procuring Eligible Organization shall have the right to terminate the Services and/or the applicable SA Exhibit B without incurring any damages or penalties should a change or discontinuance of any aspect of Services occur or should changes to the terms and conditions of applicable Services or use of the Services. Procuring Eligible Organization will remain liable for all Services used prior to such changes.

- 11. Access to Services: The Service Agreement (SA) Exhibit B shall set forth how many named individuals will have access ("Membership") to the Services. The use of the Services is restricted to the Customer's employees (full time or part time), consultants, and contractors who are authorized to use the Services by the Customer (each a "User"). Procuring Eligible Organization is responsible for each User's compliance with this Master Agreement and applicable SA Exhibit B. Procuring Eligible Organization shall establish and enforce appropriate security measures to limit access to the Services to authorized Users. Users shall advise Info-Tech immediately if they discover that their password has been compromised. Procuring Eligible Organization may not use the Services in any manner that violates this Master Agreement or any applicable laws or, subject to Section 16 ("Assignment"), sublicense, sell or assign this Master Agreement and/or SA Exhibit B. In an internal network environment a Membership is required for each Procuring Eligible Organization employee that has access through the network to Services. Procuring Eligible Organization is prohibited from providing access to third parties and to any non-licensed employee.
- 12. Internal Use of Services: Procuring Eligible Organization may make copies or slides of each spreadsheet, graphic, table, or portion of text contained in the Services for internal presentation purposes only provided the Info-Tech copyright notice and date of publication is affixed thereto. The User may however forward individual research documents within employee workgroups for decision support. Acting as a librarian is strictly prohibited. The User may download any policies, templates or tools for wider internal use. The User may alter the policy, template or tool and remove any copyright, trademark or other notices. Inquiries regarding permission to copy or use the Services in any other manner should be directed to Info-Tech's Public Relations department.
- 13. External Use of the Services: Users may not reproduce or distribute Services externally without Info-Tech's prior written permission, except if (a) the research document to be distributed is a Request for Proposal (RFP) template being sent to potential vendors or (b) Procuring Eligible Organization purchases a reprint for an individual research document and if the document is used in its entirety. Procuring Eligible Organization may excerpt from the Services only if Procuring Eligible Organization obtains the prior written approval of Info-Tech Public Relations. Procuring Eligible Organization must comply with Info-Tech's citation policy when using any research externally. The citation policy can be found on Info-Tech's Web site.
- 14. **Confidential Information**: Info-Tech recognizes that, in the process of providing professional services to Procuring Eligible Organization, Procuring Eligible Organization may provide confidential information, the disclosure of which would be to Procuring Eligible Organization's detriment. Info-Tech

agrees not to disclose such confidential information except to its employees who have a need to know with respect to the purposes of this Master Agreement. Info-Tech shall use at least the same degree of care in safeguarding such confidential information as it uses for its own information of like importance, but in no event less than a standard of reasonable care. Additionally, Info-Tech may disclose such information to the extent required by legal process, in which case, Info-Tech agrees to give Procuring Eligible Organization notice prior to disclosing such information to allow Procuring Eligible Organization to seek injunctive relief or other such relief as may be appropriate. Confidential Information is all information of either party that is not generally known to the public, whether of a technical, business or other nature and that has been identified as being proprietary and/or confidential. Confidential information shall not include any information that: (1) is in the public domain at the time of its communication; (2) is independently developed by Info-Tech; (3) entered the public domain through no fault of Info-Tech subsequent to Procuring Eligible Organization's communication to Info-Tech; (4) is in Info-Tech's possession free of any obligation of confidence at the time of Procuring Eligible Organization's communication to Info-Tech; or (5) is communicated by the Procuring Eligible Organization to a third party free of any obligation of confidence. Notwithstanding anything to the contrary in this Master Agreement or SA to this Master Agreement, both Info-Tech and Procuring Eligible Organization agree to comply with the public records laws or similar type laws of the State in which Procuring Eligible Organization is located or founded.

15. User Submissions: Info-Tech's research services include the ability for Procuring Eligible Organizations to contribute content for publication on Info-Tech's Web sites. If your account is used to submit, post, or add content to the Info-Tech's Web sites, (collectively, "User Submissions"), you agree to accept sole responsibility for those User Submissions, including the information, statements, facts, and material contained in any form or medium (e.g., text, audio, video, and photographic) therein.

When you provide any User Submission to us, you grant us, our affiliates, and our partners, a worldwide, irrevocable, royalty-free, nonexclusive, sublicensable license to use, reproduce, create derivative works of, distribute, publicly perform, publicly display, transfer, transmit, distribute, and publish such User Submission, and subsequent versions thereof. You agree you will not attempt to enforce any so-called "moral rights" in your User Submission against us, our affiliates, and/or our partners. This license will apply to the distribution and the storage of your User Submission in any form, medium, or technology now known or later developed.

By using Info-Tech's research services, you agree that none of your User Submissions will:

• infringe on the intellectual property, trade secret, privacy, publicity, or other rights of others;

• contain false statements or misrepresentations that could damage Info-Tech or any third party;

• include obscene, libelous, defamatory, threatening, harassing, abusive, hateful, sexually explicit, sexually oriented, profane, or embarrassing material, as determined by Info-Tech in its sole discretion;

• be illegal or otherwise objectionable;

• contain the private information of any third party, including, without limitation, addresses, phone numbers, email addresses, Social Security numbers, and credit card numbers;

- encourage or facilitate insider trading or anticompetitive behavior;
- include commercial advertisements or solicitations; or
- purport to or actually provide legal or professional advice.

Because Info-Tech's Web sites are available to the public, we cannot guarantee that any User Submissions, even those that you do not intentionally publish, will remain confidential, nor do we guarantee that User Submissions published in a Restricted Area will be available only to Members.

Although you are solely responsible for the content you provide and we do not have a policy of reviewing or monitoring all User Submissions, we reserve the right to pre-screen and/or monitor User Submissions. If we become aware of User Submissions that violate these Terms of Service or that we believe to be otherwise objectionable, we may reject or delete them, or take other action, without notice to you and in our sole discretion.

If you believe that any User Submissions appear to violate these Terms of Service, or if you believe any other user is engaged in illegal, harassing, or objectionable behavior, please contact our Privacy Officer, <mailto:privacyofficer@infotech.com>.

You acknowledge, consent and agree that Info-Tech may access, preserve and disclose your account information and content if required to do so by law or in a good faith belief that such access, preservation, or disclosure is reasonably necessary to (i) comply with legal process; (ii) enforce these Terms; (iii) respond to claims that any content violates the rights of third parties; (iv) respond to your requests for customer service; or (v) protect the rights, property, or personal safety of Info-Tech, its users and the public.

16. Assignment: Neither Party shall sell, transfer assign, or otherwise dispose of this Master Agreement or any portion thereof or of any right, title or interest herein without the prior written consent of the other Party. Procuring Eligible Organization shall not assign its rights or obligations hereunder without Info-Tech's written consent.

- 17. Non-Infringement Warranty: Info-Tech warrants that the Services, in the form provided by Info-Tech, will not, to the best of its knowledge, violate or infringe upon the intellectual property rights of any third party.
- 18. WARRANTY: INFO-TECH WARRANTS THAT THE SERVICES ARE BASED ON COMPILATION AND ANALYSIS OF REASONABLE SOURCES AVAILABLE TO INFO-TECH AT ANY GIVEN TIME AND, THAT ANY OPINIONS REFLECT INFO-TECH JUDGMENT AT THE TIME AND ARE SUBJECT TO CHANGE. INFO-TECH FURTHER WARRANTS THAT IT SHALL PERFORM ALL SERVICES IN A SKILLFULL, COMPETENT, TIMELY, PROFESSIONAL AND WORKMANLIKE MANNER CONSISTENT WITH THE STANDARDS FOR ITS INDUSTRY, AND THAT THE INFO-TECH EMPLOYEES AND AGENTS ASSIGNED TO PERFORM SERVICES UNDER THIS MASTER AGREEMENT HAVE THE PROPER SKILL, TRAINING AND BACKGROUND SO AS TO BE ABLE TO PERFOM IN A SKILLFULL, COMPETENT, TIMELY, PROFESSIONAL AND WORKMANLIKE MANNER. THE SERVICES ARE DELIVERED "AS IS", AND INFO-TECH AND ITS SUPPLIERS AND DISTRIBUTORS DO NOT MAKE ANY WARRANTIES OR CONDITIONS, EXPRESS OR IMPLIED, AND EXCLUDE AND DISCLAIM ANY AND ALL IMPLIED WARRANTIES OR CONDITIONS INCLUDING, WITHOUT LIMITATION, THOSE OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE OTHER THAN SET FORTH IN THE STATEMENT OF WORK. THE SERVICES ARE INTENDED SOLELY AS A RESEARCH TOOL AND ARE NOT MEANT AS SPECIFIC GUIDES TO ACTION.
- 19. Indemnification: Info-Tech shall indemnify, defend and hold harmless MHEC and/or Procuring Eligible Organization, their respective board of trustees, officers, employees, agents, affiliates, subsidiaries, successors and assigns from and against any and all claims, damages, liabilities, costs, and expenses, including reasonable attorneys' and experts' fees, and including claims of third parties, arising out of or in connection with any claims based upon alleged libel, slander, defamation, invasion of the right of privacy, violations of the right of publicity, or violation or infringement of copyright or other third party proprietary rights arising out of the Services, provided that: (a) MHEC and/or Procuring Eligible Organization promptly notifies Info-Tech in writing of any such claims, damages, liabilities, costs, or expenses; (b) subject to any legally required approval, including the approval of Procuring Eligible Organization's state attorney general, Info-Tech shall have sole control of the settlement and defense of any action to which this indemnity relates; and (c) MHEC and/or Procuring Eligible Organization cooperates in every reasonable way to facilitate such defense.
- 20. Limited Liability: (a) Related to Procuring Eligible Organization: Info-Tech's liability under this Agreement under any theory of liability, including,

without limitation, negligence, shall be limited to two times the fees paid by Procuring Eligible Organization during the preceding twelve months under the SA Exhibit B under which such liability arose. Except for violation of Info-Tech's intellectual property rights, neither party shall be liable for consequential, indirect, special or incidental damages, such as damages for lost profits, business failure or loss, arising out of the use of the services, whether or not such party has been advised of the possibility of such damages. They shall apply even if this agreement is found to have failed in its fundamental or essential purpose or been fundamentally breached. The foregoing limitation under this Section does not apply to Info-Tech's termination of this Agreement other than in accordance with the terms of this Agreement, or for Info-Tech's indemnification obligations under Section 19 of this Agreement.

(b) Related to MHEC: Info-Tech's liability under this Agreement under any theory of liability, including, without limitation, negligence, shall be limited to two times the Administration Fee payable to MHEC during the preceding twelve months pursuant to Section 26 in the year under which such liability arose. Except for violation of Info-Tech's intellectual property rights, neither party shall be liable for consequential, indirect, special or incidental damages, such as damages for lost profits, business failure or loss, arising out of the use of the services, whether or not such party has been advised of the possibility of such damages. They shall apply even if this agreement is found to have failed in its fundamental or essential purpose or been fundamentally breached. The foregoing limitation under this Section does not apply to Info-Tech's termination of this Agreement other than in accordance with the terms of this Agreement, or for Info-Tech's indemnification obligations under Section 19 of this Agreement.

- 21. **Records and Audit**: Info-Tech agrees to maintain detailed business records pertaining to the price of Services rendered for a period of six (6) years from the date of each SA Exhibit B. These records shall be subject to inspection by Procuring Eligible Organization and appropriate governmental authorities with Procuring Eligible Organization's state. The Procuring Eligible Organization shall have the right to audit billings either before or after payment. Payment under this Master Agreement shall not foreclose the right of the Procuring Eligible Organization to recover excessive or illegal payments.
- 22. **Independent Contractor**: Info-Tech provides the Services as an independent contractor. The Agreement will not create an employer-employee relationship, association, joint venture, partnership, or other form of legal entity or business enterprise between the parties, their agents, employees or affiliates. Info-Tech represents and warrants that in performing the Services under this Master Agreement, Info-Tech will not be in breach of any agreement with a third party.

- 23. **Compliance with the Law**: Info-Tech shall comply with all applicable laws and governmental regulations, which by their terms, apply to Info-Tech's performance under a SA Exhibit B pursuant to this Master Agreement. Procuring Eligible Organization agrees to comply with all applicable laws and governmental regulations in connection with this Master Agreement. MHEC agrees to comply with all applicable laws and governmental regulations in connection with this Master Agreement.
- 24. **Governing Law**: (a) As between Procuring Eligible Organization and Info-Tech, this Master Agreement will be construed in accordance with, and its performance governed by the laws of the state in which the Procuring Eligible Organization resides. Venue for all legal proceedings arising out of this Master Agreement, or breach thereof, shall be in a state or federal court with competent jurisdiction located in the state in which the Procuring Eligible Organization resides.

(b) As between MHEC and Info-Tech, this Master Agreement will be construed in accordance and its performance governed by the laws of the state of Minnesota. Venue for all legal proceedings arising out of this Master Agreement, or breach thereof, shall be in a state or federal court with competent jurisdiction located in the State of Minnesota.

(c) As between Procuring Eligible Organization, MHEC, and Info-Tech, this Master Agreement will be construed in accordance with and its performance governed by the laws of the state in which the Procuring Eligible Organization resides. Venue for all legal proceedings arising out of this Master Agreement, or breach thereof, shall be in a state or federal court with competent jurisdiction located in the state in which the Procuring Eligible Organization resides.

25. **Notification**: (a) Between the Parties: Whenever under the terms of this Master Agreement any notice is required or permitted to be given by one Party to the other, such notice shall be given in writing and shall be deemed to have been sufficiently given for all purposes hereof if given by facsimile or mail, postage prepaid, to the Parties at the addresses set forth below, or at such other address as the Parties may direct in writing from time to time:

To MHEC	To Info-Tech
MHEC	Info-Tech Research Group
105 5 <sup>th</sup> Ave S Suite 450	602 Queens Avenue
Minneapolis, MN 55401	London, Ontario, Canada
Phone: 612-677-2767	N6B 1Y8
Attn: Nathan Sorensen	Phone : 519-432-3550
nathans@mhec.org	Attn : Dave Bell dbell@infotech.com
Facsimile: 612-767-3353	Facsimile : 519-432-2506

Changes to the above information will be given to the other Party in a timely manner

- (b) To Procuring Eligible Organization: Notices shall be sent to Eligible Organization's business address. The term "business address" shall mean the "Bill to" address set forth in the SA signed by the Procuring Eligible Organization.
- 26. Administrative Reporting and Fees: On a quarterly basis (where quarter one is January 1 March 31 and the quarter one report is due by April 30), Info-Tech will, in a timely manner, make available to MHEC reports and information generated by this Master Agreement, including but not limited to state-by-state and institution-by-institution information on sales volume and volume savings. The information and reports shall be accompanied with a check payable to the Midwestern Higher Education Commission for an amount equal to one percent (1%) of the net Service sales for that quarter period (the "Fee"). MHEC, from time to time and at its sole discretion, may change the percentage of the Fee it will receive as a result of this Master Agreement. Any change in the fee may also require a change in the Services price.
- 27. **MHEC Not Liable**: MHEC is not liable to Info-Tech for the failure of any Procuring Eligible Organization to make any payment or to otherwise fully perform pursuant to the terms and conditions of a SA Exhibit B and/or the Master Agreement.
- 28. **Prior Agreement**: This agreement, together with any SA Exhibit B, contains the complete and exclusive statement of the agreement between the parties and supersedes all prior and contemporaneous agreements, purchase orders, understandings, proposals, negotiations, representations or warranties of any kind whether written or oral. No oral or written representation that is not expressly contained in this agreement is binding on either party. This agreement cannot be amended or modified, other than by a change made in writing, dated and executed by the parties.
- 29. Force Majeure: Neither party shall be liable for an omission or delay in the execution of its obligations hereunder caused by an event beyond its reasonable control. The time for the performance of the obligation that is so delayed shall be extended by a reasonable time, provided that payments shall not be delayed.
- 30. **Severability**: In the event any provision of this Master Agreement shall not be enforceable, the remainder of this Master Agreement shall continue in full force and effect.
- 31. Sovereign Immunity: Notwithstanding anything to the contrary in this Master Agreement or SA Exhibit B under this Master Agreement, this Master Agreement shall not be construed to deprive a Procuring Eligible Organization of its sovereign immunity, or of any legal requirements, prohibitions,

protections, exclusions or limitations of liability applying to this Master Agreement or afforded by Procuring Eligible Organization's State to the Procuring Eligible Organization.

32. Miscellaneous: Procuring Eligible Organization shall not use Info-Tech's name, trademarks or logo in any promotional materials without Info-Tech's express written consent. Info-Tech shall not use MHEC and/or Procuring Eligible Organization's name, trademarks or logo in any promotional materials without MHEC and/or Procuring Eligible Organization's express written consent.

All parties to this Master Agreement may retain a reproduction (e.g., electronic image, photocopy, facsimile) of this Master Agreement that shall be considered an original and shall be admissible in any action to enforce this Master Agreement.

The Parties, by their respective signing below, agree with the terms of this Master Agreement and further certify that their respective signatories are duly authorized to execute this Agreement.

**Midwestern Higher Education** Commission Signature Name: Laver I. Saak

Title: President

Date: 3-20-13

Info-Tech Research Group

DAV. N Junsant

R4D VP

FEBRU.TLY 15, 2013

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#### SERVICES PRICING EXHIBIT Exhibit A INFO-TECH RESEARCH GROUP

#### A. TEAM ACCESS PRICING GUIDELINES

Membership types for each customer are determined by the customer's segment. Segment is defined by the total number of full-time equivalent (FTE) IT staff employed by the enterprise including all locations, divisions, departments and business units (verified at time of purchase).

Each physical business location (a "site") must purchase their own membership which will reflect the segment applicable to the total FTE IT staff in the entire enterprise. Memberships are not based solely on the number of staff at the actual site, or department/division or business unit within a physical location. Customers purchasing a membership may not add IT staff to their membership that are not based at the physical address provided, unless previously agreed upon by Info-Tech Research Group. Memberships that cover multiple business locations, and/or departments, and/or divisions and/or subsidiaries/parent companies are available, but will be considered "open market" and quoted on a customized basis. Organizations with more than 100 IT staff fit in the Enterprise segment and will be quoted on a customized basis. Info-Tech and Procuring Eligible Organization, issuance of a valid Purchase Order with reference to this Master Agreement and completion of a valid Service Agreement (SA) Exhibit B, will mutually agree to the Services, applicable fee and any additional contract terms.

Where an organization has several divisions, departments or business units at a single location, each business unit or division must purchase their own team membership or purchase a custom license. Once purchased, the customer may determine how many members of the staff at their site will have login access and receive email distribution of research content.

Where a customer outsources a significant portion of IT functions, Info-Tech will determine segment based on data such as annual revenue, number of staff, number of business locations, and complexity of technology operations.

Info-Tech reserves the right to determine what constitutes a site, and to apply a segment to the customer for the purposes of determining the license available for purchase.

Info-Tech will provide complete and updated price lists to MHEC on a annual basis. In addition we will identify all line item price increases, decreases, product additions and/or deletions.

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#### **B. INFO-TECH PRICING**

#### **Bronze Membership**

Bronze membership includes team access to the following features:

- Application Silo
- Infrastructure Silo
- MeasureIT
- OptimizeIT

Info-Tech Segment	# of IT Staff	BRONZE Site Price (list price)ice)	BRONZE MHEC Price
Small A	1 to 5	\$2,400	\$1,785
Small B	6 to 10	\$3,400	\$2,525
Medium	11 to 25	\$10,900	\$8,095
Large	26 to 100	\$16,500	\$12,255

#### Silver Membership

Silver membership includes team access to the following features:

- Application Silo
- Infrastructure Silo
- MeasureIT
- OptimizeIT
- 3 named users for the IT Strategy & Leadership Silo and Personal Advisory Services
- For Medium, Large and Enterprise: 3 named users for Mark Anderson's Predicting the Future content
- Access to CIO Business Vision (Business Needs Assessment tool)

Info-Tech Segment	# of IT Staff	SILVER Site Price (list price)	SILVER MHEC Price
Small A	1 to 5	\$5,500	\$4,085
Small B	6 to 10	\$6,500	\$4,830
Medium	11 to 25	\$15,900	\$11,810
Large	26 to 100	\$22,900	\$17,010

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#### **Gold Membership**

Gold membership includes team access to the following features:

- Application Silo
- Infrastructure Silo
- MeasureIT
- OptimizeIT
- All users have access to IT Strategy & Leadership Silo and Personal Advisory Services
- For Medium, Large and Enterprise: 3 named users for Mark Anderson's Predicting the Future content
- Access to CIO Business Vision (Business Needs Assessment tool)10 Enterprise Advisory units for custom research

Info-Tech Segment	# of IT Staff	Gold Site Price (list price)	GOLD MHEC Price
Small A	1 to 5	\$7,500	\$5,570
Small B	6 to 10	\$8,500	\$6,315
Medium	11 to 25	\$19,900	\$14,775
Large	26 to 100	\$32,900	\$24,430

#### C. McLEAN and COMPANY PRICING

#### **Bronze Membership**

Bronze membership includes team access to the following features:

- Online Research
- Customized HR Benchmarking

McLean & Company	BRONZE Site Price		
Segment	(list price)	Price	
Small A	\$1,900	\$1,410	
Small B	\$2,900	\$2,155	
Medium	\$4,900	\$3,640	
Large	\$6,900	\$5,125	

#### Silver Membership

Silver membership includes team access to the following features:

- Online Research
- Customized HR Benchmarking
- Policies & Job Descriptions
- Access to Standard Surveys
- 3 named users Personal Advisory Services

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McLean & Company Segment	BRONZE Site Price (list price)	BRONZE MHEC Price
Small A	\$5,500	\$4,085
Small B	\$6,500	\$4,825
Medium	\$9,900	\$7,400
Large	\$14,900	\$11,065

#### **Gold Membership**

Gold membership includes team access to the following features:

- Online Research
- Customized HR Benchmarking
- Custom Policies & Job Descriptions
- Access to Surveys with Unlimited Customization
- Personal Advisory Services

McLean & Company Segment	GOLD Site Price (list price)	GOLD MHEC Price
Small A	\$7,900	\$5,865
Small B	\$9,900	\$7,350
Medium	\$19,000	\$7,350
Large	\$32,900	\$24,430

### D. World Class Operations

World Class Operations*		
Product / Currency: USD		
Workshop \$15,000		

\*Word Class Operation workshops will not be discounted for MHEC members.

**Price Escalation:** The parties agree that the annual price increase, as defined as the effective date, that affects the MHEC Price shall not exceed 5% or the United States Consumer Price Index (CPI-U), whichever is greater.

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### SERVICE AGREEMENT - SA Exhibit B INFO-TECH RESEARCH GROUP

#### **Research and Advisory Memberships**

#### Team Access

Info-Tech memberships are based on a team licensing model that allows access for all IT staff.

#### **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.

#### **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:
  - o Step-by-step, task-focused guidance for every project
  - o 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
- 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.

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#### Sample Solution Map and Sets Example taken from server and storage virtualization:



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
  - Leverage your peers' best practices
- Decision tools, templates, and polices

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- Use tested tools and proven methods
- Video summaries of our point of view and analysis
  - o 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.

#### OptimizeIT

OptimizeIT is a best practices development system for core IT functions, and it is a key component of your membership. It provides programs designed to help you dramatically improve your IT operations, processes and resource management. OptimizeIT will help you efficiently use your scarce resources by showing you the steps to take and providing the tools you need to streamline your IT functions. The major disciplines are outlined below.

#### **OptimizeIT Management Best Practices Topics**

- 1. Project Management
  - Project Prioritization
  - PM Lite
  - Project Portfolio Monitoring

#### 2. IT Strategy and Planning

• IT Strategy

#### 3. IT Resource Management

- Talent Management
- Vendor Management

#### 4. Applications Management

• Application Maintenance

#### 5. IT Governance

• Policy and Procedure Management

#### 6. Risk Management

- IT Continuity Planning
- Compliance
- Security

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#### 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:

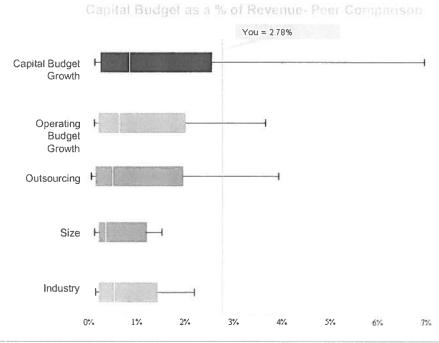
- Justify your spending with valuable budget data customized to your company
- Compare your staffing practices with those of your peers to see if your department is in line with those at similar organizations
- Access (in one convenient program) over 100 custom metrics that are impossible to find anywhere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



Practical Research that Drives Measurable Results

### **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 <u>Purchase Optimization</u> 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.

#### 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)

#### **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.

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Practical Research that Drives Measurable Results

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

#### 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

#### Service Details

#### 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.

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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.

#### **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

## INFO~TECH research group

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#### INFO-TECH RESEARCH GROUP SERVICE AGREEMENT

#### **Service Agreement**

This Service Agreement (SA) is between Info-Tech Research Group (Info-Tech) located at 602 Queens Ave., London, ON, Canada N6B 1Y8 and <ENTER ENTITY NAME AND ADDRESS> (Eligible Organization), and includes the Midwestern Higher Education Compact (MHEC) Master Agreement MHEC-130214 between Info-Tech and MHEC, the terms of which are incorporated by reference. This SA constitutes the complete agreement between Info-Tech and Eligible Organization, and shall be effective when signed by both parties. Eligible Organization agrees to subscribe to the following Services for the term and fees set forth above.

Services	Membership Period	Price	Total
Total Investment			

Once this contract is signed and approved, your memberships will be initiated. Your services will commence within 2 business days of receipt of this executed agreement. Please sign and date this proposal and fax to the number provided below.

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

INFO-TECH RESEARCH GROUP INC.

Institution Name:

Signature:	Signature:	
Name:	Name:	
Title:	Title:	
Date:	Date:	
illing Information Purchase order Number: Invoice Recipient Name: Invoice Recipient E-mail: Billing Address:		

\*Payments are due net 30 days from Client's receipt of invoice.

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### Please return fax or original of this signed Service Agreement to:

Dave Bell Director of Sales Info-Tech Research Group Inc. 602 Queens Ave. London, Ontario, Canada N6B 1Y8 Tel: 888-670-8889 Fax: 519-432-2506 dbell@infotech.com