

RFP 22-68786
Attachment F – Technical Proposal

1. General

1. Please list any additional terms and definitions used by your company or industry that you would like the State to consider incorporating in the contract. The State will not accept terms and definitions introduced after award, during contract finalization and implementation.

Response to IOT's Request for Sample Privacy and Security Terms (BAA)

This responds to Indiana Office of Technology's ("IOT") request that SHI International Corp. ("SHI") agree to the "Sample Privacy and Security Terms" ("the Terms") with respect to the business relationship between IOT and SHI. We have reviewed the proposed Terms and have determined that they are not necessary or appropriate within the framework of the business relationship between IOT and SHI, as we explain.

As you are aware, a "business associate" under HIPAA is a person or organization, other than a member of a covered entity's workforce, that performs certain functions or activities on behalf of, or provides certain services to, a covered entity that involve the use or disclosure of protected health information ("PHI"). To be subject to HIPAA, such use or disclosure of PHI must be deliberate and constitute the purpose of the services provided. Pursuant to the HIPAA guidelines, a business associate relationship involves willfully creating, receiving, maintaining, or transmitting PHI as part of its service offering to the covered entity. In short, a business associate relationship is predicated on being engaged to "process" PHI. However, SHI has not been engaged to provide any services to PHI that are predicated on the processing of PHI, in any manner.

We appreciate your desire to maintain compliance with applicable legislation, but in short, it is not necessary for SHI to process PHI for any service offering in which SHI has been engaged by IOT, and, therefore, SHI cannot be characterized as a business associate of IOT. Given that SHI's services fall outside HIPAA coverage, it is neither necessary nor appropriate for SHI to agree to the proposed Terms. That said, as a GDPR-compliant and CCPA-compliant entity, SHI respects and protects the rights of data subjects in compliance with all applicable data protection regulations and implements security and privacy measures designed to protect our customers' personal information. We trust this resolves the issue.

Please contact emmanuel_maroulis@SHI.com, if you have any further questions regarding the foregoing.

2. Please confirm you have carefully reviewed all requirements listed in RFP Section 1.4. Should your company have any exceptions, substitutions, or conditions for the State's consideration, please list them below. The State will not accept exceptions, substitutions, or conditions introduced after award, during contract finalization and implementation.

SHI Comments To Terms And Conditions for State of Indiana

This proposal is based on mutually agreeable terms and conditions. If SHI is a potential candidate for award, we will be pleased to discuss the details of the terms and conditions for the contract. If SHI and You already have a contract in place that covers these offerings, we can use those to avoid conflicting documents and make the contracts turnaround time faster. SHI is a reseller and not the OEM. SHI may also provide professional services, as applicable. Therefore, the terms and conditions have been modified below to reflect this relationship.

Ref.	Customer Terms and Conditions	SHI Redline	SHI Explanation
Attachment B Sample Contract PROFESSIONAL SERVICES CONTRACT 23. HIPAA Compliance		<u>RESERVED.</u>	SHI will not access PHI as we feel this is not in scope of the agreement. We request the removal of this language as it does not apply to SHI for this opportunity.
24. Indemnification	The Contractor agrees to indemnify, defend, and hold harmless the State, its agents, officials, and employees from all third party claims and suits including court costs, attorney's fees, and other expenses caused by any act or omission of the Contractor and/or its subcontractors, if any, in the performance of this Contract. The State will not provide indemnification to the Contractor.	The Contractor agrees to indemnify, defend, and hold harmless the State, its agents, officials, and employees from all third party claims and suits including court costs, <u>reasonable</u> attorney's fees, and other expenses caused by <u>any act or omission</u> <u>the</u> <u>gross negligence, willful misconduct or violation of law</u> of the Contractor and/or its subcontractors, if any, in the performance of this Contract. The State will not provide indemnification to the Contractor.	SHI will indemnify against third party claims due to its gross negligence, willful misconduct or violation of law in its performance under this agreement.
28. Insurance.	1. Commercial general liability, including contractual coverage, and products or completed operations coverage (if applicable), with minimum liability limits not less than \$700,000 per person and \$5,000,000 per occurrence unless additional coverage is required by the State. The State is to be named as an additional insured on a primary, non-contributory basis for any liability arising directly or indirectly under or in connection with this Contract. 2. Automobile liability for owned, non-owned and hired autos with minimum liability limits not less than \$700,000 per person and \$5,000,000 per occurrence. The State is to be named as an additional insured on a primary, non-contributory basis.	1. Commercial general liability, including contractual coverage, and products or completed operations coverage (if applicable), with minimum liability limits not less than \$700,000 per person and <u>\$51,000,000</u> per occurrence unless additional coverage is required by the State. The State is to be named as an additional insured on a primary, non-contributory basis for any liability arising directly or indirectly under or in connection with this Contract. 2. Automobile liability for owned, non-owned and hired autos with minimum liability limits not less than \$700,000 per person and <u>\$51,000,000</u> per occurrence. The State is to be named as an additional insured on a primary, non-contributory basis.	SHI insurance policy limits are listed as such.
ADD		<u>Limitation of Liability</u> <u>NEITHER PARTY WILL BE LIABLE FOR ANY SPECIAL, PUNITIVE, INDIRECT, INCIDENTAL OR CONSEQUENTIAL DAMAGES INCLUDING, BUT NOT LIMITED TO, LOSS OF OR DAMAGE TO DATA, LOSS OF ANTICIPATED REVENUE OR PROFITS, WORK STOPPAGE OR IMPAIRMENT OF OTHER ASSETS, WHETHER OR NOT FORESEEABLE AND WHETHER OR NOT A PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.</u> <u>EXCEPT IN THE CASE OF BREACH OF EACH PARTY'S LIABILITY FOR PERSONAL INJURY/PROPERTY DAMAGE, EITHER PARTY'S TOTAL</u>	If awarded, SHI would like this clause added to the final contract.

SHI Comments To Terms And Conditions for State of Indiana

		<u>CUMULATIVE LIABILITY TO THE OTHER IN CONNECTION WITH THIS AGREEMENT, WHETHER IN CONTRACT, TORT OR OTHER THEORY, WILL NOT EXCEED THE TOTAL AMOUNT OF FEES ACTUALLY PAID OR PAYABLE BY THE STATE OF INDIANA TO CONTRACTOR UNDER THIS AGREEMENT FOR THE YEAR PREVIOUS TO THE INCIDENT WHICH GAVE CAUSE FOR SUCH LIABILITY.</u>	
ADD		<u>All returns shall be subject to the contractor's return policy at www.shi.com/returnpolicy</u>	If awarded, SHI would like this clause added to the final contract.
ADD		<u>WARRANTY DISCLAIMER: EXCEPT AS OTHERWISE EXPRESSLY PROVIDED IN THIS AGREEMENT, CONTRACTOR HEREBY EXPRESSLY DISCLAIMS ALL WARRANTIES EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, ANY WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE, WARRANTY OF NON-INFRINGEMENT, OR ANY WARRANTY RELATING TO THIRD PARTY PRODUCTS.</u>	If awarded, SHI would like this clause added to the final contract.
ADDITIONAL TERMS FOR CLOUD SERVICES ENGAGEMENTS Exhibit 1 5. Audits.	<p>A. Contract Audit. The State shall be permitted to conduct audits to confirm that the Contractor is adhering to the terms of the Contract – including these Cloud Terms, the SOW, and an SLA – at the State's discretion and expense. The audits may be conducted by the State or by a third party.</p> <p>B. Data Center Audit. The Contractor must have each of the data centers where the Data, state applications, or other information of the State are maintained audited by an independent third-party auditor at least once annually, at the Contractor's expense, and the Contractor must provide a complete copy of the resulting SOC2 report – or an IOT-approved equivalent – to IOT and any Agency Contacts. The State may also conduct an annual audit of these data centers at the State's expense. The State's audit may be conducted onsite or remotely by the State or a third-party auditor. The State shall provide at least 30 days' notice to the Contractor in advance of any such audit, and the Contractor shall take reasonable steps to facilitate it – including by making its staff available to the State or the State's auditor.</p>	<p>A. Contract Audit. <u>Upon (30) thirty days written notice</u> The the State shall be permitted to conduct audits to confirm that the Contractor is adhering to the terms of the Contract – including these Cloud Terms, the SOW, and an SLA – at the State's discretion and expense. The audits may be conducted by the State or by a third party. <u>Such audits are limited to once in a twelve month period.</u></p> <p>B. Data Center Audit. The Contractor must have each of the data centers where the Data, state applications, or other information of the State are maintained audited by an independent third-party auditor at least once annually, at the Contractor's expense, and the Contractor must provide a complete copy of the resulting SOC2 report – or an IOT-approved equivalent – to IOT and any Agency Contacts. The State may also conduct an annual audit of these data centers at the State's expense. The State's audit may be conducted onsite or remotely by the State or a third-party auditor. The State shall provide at least 30 days' notice to the Contractor in advance of any such audit, and the Contractor shall take reasonable steps to facilitate it – including by making its staff available to the State or the State's auditor.</p>	<p>SHI requires written notice and limits audit frequency.</p> <p>Data Center Audit does not apply because SHI will not house or store customer data or customer applications within its data centers. SHI is not a hosting, SaaS, IaaS or PaaS provider. The only customer data SHI would have in its data centers is transaction data in order to fulfill orders and manage the business relationship between the customer and SHI.</p>
7. Warranties.	A. The Service. With respect to the Service, the Contractor warrants as follows:	A. The Service. With respect to the Service, the Contractor <u>shall pass through all standard manufacturer warranties and guarantees which</u> warrants as follows:	SHI is a reseller and will pass through all manufacturer warranties to the state. SHI will also facilitate any warranty claims.

SHI Comments To Terms And Conditions for State of Indiana

<p>8. Liability.</p>	<p>A. Limitation. The Contractor's per-event liability under the Contract shall be limited to three times the sum that the State will pay to the Contractor for the Service, with the understanding that multiple losses stemming from the same root cause shall constitute a single event. FOR ALL OTHER CONTRACTUAL CLAIMS, IN NO EVENT SHALL EITHER PARTY BE LIABLE FOR ANY INDIRECT, INCIDENTAL, CONSEQUENTIAL, OR PUNITIVE DAMAGES – INCLUDING LOSS OF PROFIT, INCOME, OR SAVINGS – EVEN IF ADVISED OF THE POSSIBILITY THEREOF, EXCEPT WHEN SUCH DAMAGES ARE CAUSED BY THE GROSS NEGLIGENCE OR WILLFUL MISCONDUCT OF THE PARTY, ITS EMPLOYEES, AGENTS, OR SUBCONTRACTORS.</p>	<p>A. Limitation. The Contractor's per-event liability under the Contract shall be not limited exceed to three times the sum that the total amount of fees actually paid or payable by the State will pay to the Contractor for the Service, <u>under this Contract for the year previous to the incident which gave cause for such liability</u>, with the understanding that multiple losses stemming from the same root cause shall constitute a single event. FOR ALL OTHER CONTRACTUAL CLAIMS, IN NO EVENT SHALL EITHER PARTY BE LIABLE FOR ANY INDIRECT, INCIDENTAL, CONSEQUENTIAL, OR PUNITIVE DAMAGES – INCLUDING LOSS OF PROFIT, INCOME, OR SAVINGS – EVEN IF ADVISED OF THE POSSIBILITY THEREOF, EXCEPT WHEN SUCH DAMAGES ARE CAUSED BY THE GROSS NEGLIGENCE OR WILLFUL MISCONDUCT OF THE PARTY, ITS EMPLOYEES, AGENTS, OR SUBCONTRACTORS.</p>	<p>SHI wishes to limit liability to the total amount of fees actually paid or payable by the State to SHI under this agreement for the year previous to the incident which cause for such liability.</p>
----------------------	--	---	--

3. Describe your approach to providing reseller services to fulfill the requirements listed in the Scope of Work.

We provide a vendor-neutral approach to help find the right technology to meet every specific requirement of our customers' environment, and we use our experience and breadth of knowledge to help you design, implement, and optimize your IT ecosystem.

In addition to the support of a dedicated Indiana sales team, SHI has the largest team of Software and Licensing Specialists in the industry. These teams are in place to support our customers and sales teams in any possible way. SHI has the expertise in managing the varied features of the Publisher Licensing Programs. Our award-winning team of Software and Licensing Specialists are available to assist you with selecting your licensing programs, executing the agreements, and supporting the agreement lifecycle. When it comes to software, SHI's expertise is second to none. Following are just a few examples of the benefits we bring to our customers for their software needs:

Licensing Team – With the largest team of Software and Licensing Specialists in the industry, SHI has the expertise in managing the varied features of the Publisher Licensing Programs. Our team of Software and Licensing Specialists is available to assist you with selecting your licensing programs, executing the agreements, and supporting the agreement lifecycle.

Software Asset Management – SHI understands how important it is for our customers to understand and manage their valuable software assets. Our expertise, reporting, and license tracking all work together to provide peace of mind. SHI customers have confidence that they are compliant with each software publisher's unique licensing requirements, without overspending for unnecessary licensing.

Managing your Software Lifecycle – SHI's expertise extends beyond the implementation and management of your license agreements and compliance. We offer comprehensive software lifecycle support, including regular

Customer Business Reviews and our Renewal Organizer for the management and budgeting of your software and maintenance renewals.

SHI counts the leading IT Manufacturers among our strategic partners. Companies like Microsoft, Cisco, Dell/EMC, Adobe, McAfee, and VMWare rely on SHI for significant portions of their business. In fact, we are ranked in the top two for many of the top 20 software publishers on the market today. These strong and committed partnerships are essential to our ability to deliver upon our customer centric focus. Through our industry partnerships, SHI helps to weave together the technologies required to create a best-of-breed solution and help the State create an ecosystem that allows you to successfully innovate and grow.

In addition, SHI engages with a number of partner advisory councils providing an invaluable opportunity to share partner and customer feedback and help influence future releases and/or operational processes. Within these council meetings SHI is also privy to the vendor's go to market strategy and product roadmaps. SHI has been part of discussions around customer pain points that have led to changes in the way partners do business. Through our active participation these councils, we help shape their messaging and processes by being an advocate for our customers.

SHI participates on the advisory boards for the following Hardware and Software manufacturers:

Manufacturer Advisory Boards		
Software	Hardware	
BitDefender	Cisco	NetApp
Blackberry	Cohesity	Plantronics
Citrix	Dell	Pure
Commvault	Eaton	Samsung Mobility
McAfee	F5 Networks	Verizon Wireless
Mimecast	HPE	Vertiv
Palo Alto Networks	HPI	VMware
RSA	LeGrand	
Tableau	Lenovo	
Tenable		

Our proposal clearly demonstrates in more detail our dedication and successes stemming from our longstanding collaboration with the State. It explicitly articulates our methodologies, strategies, management support and approach to providing reseller services to fulfill the requirements listed in the Scope of Work.

4. Describe how you meet each Minimum Qualification listed in RFP Section 1.4.2. In your answer, ensure that you have a separate subsection or paragraph dedicated to each Minimum Qualification.

(A) Have at least three years of experience providing software products as a reseller to large organizations;

SHI Response:

Since its creation in 1994, our Public Sector Division has been successfully supporting contracts that represent a broad portfolio of services and products for a range of public entities. Through these contracts, we build deep connections that allow us to work closely with each organization and dive into the infrastructure, procurement, and compliance parameters they encounter.

In partnership with our 14,000 public sector customers, SHI's Public Sector manages over 500 current contracts, including hardware, software, services, cloud, and some that take a modern approach on technology procurement: allowing for a comprehensive catalog of both products and services. The SHI Public Sector unit comprised over \$3B of SHI's overall sales last year and was recognized as the #1 business unit for the corporation. While 2020 stands out as one of the largest growth years, SHI's Public Sector has grown consistently over the last 30 years. This overall growth stems from a laser focus on customer service, dedicated and tenured leadership, world-class Account Executives (who live and work in the communities they serve), and a broad spectrum of customers and partners. Whomever you work with at SHI, whatever location or specialty, however big or small your organization, you'll find that we all have one trait in common: our number one priority is your success.

We remain flexible in our approach to Public Sector and engage customers on an individual basis; we understand that one size does not fit all, and that philosophy is apparent in our service structure. In terms of organization, we have retained a small business feel in order to remain agile for Public Sector. We operate successfully with minimal layers of management, and we empower our sales teams to make decisions that are in the best interest of their customers.

We've facilitated Statewide software contracts for over 25 years, and we now hold IT contracts across all 50 States. The number of government clients we work with is in the thousands, from local government entities to State government departments and agencies, to educational institutions, to public sector healthcare organizations. Our contracts include Statewide contracts for software and licensing, hardware, asset management, end user services, lifecycle services, staff augmentation, and others.

Our first Statewide contract was with the State of Texas, signed in 1994, and some of our relationships with State government customers date back to 1991.

With our extensive experience administering Software Value Added Reseller contracts of this exact nature, we are confident that we will exceed the requirements of this request. In fact, SHI appreciates the opportunity to work with the State and we have taken pride in our ability to administer the agreement to the maximum benefit of the contract users.

We understand the intricacies of implementing and maintaining a software contract, advocating for multiple agencies and municipalities. When we enter into an agreement of this magnitude, we take great care to implement support and service plans to meet the needs of each contract user.

(B) Have at least one client for whom the Respondent provides more than \$20 million in software annually;

SHI Response:

The Public Sector team is proud to support all its customers throughout the country. Our dedicated Public Sector team ensure that – regardless of the size or location of a customer – end-users have perpetual sales support within SHI.

Currently our largest Public Sector top ten States, in order of spend, are:

1. State of Texas

2. State of New York
3. State of Florida
4. State of New Jersey
5. State of California
6. State of North Carolina
7. Commonwealth of Virginia
8. State of Missouri
9. Commonwealth of Massachusetts
10. State of Oregon

(C) Be a qualified Microsoft Large Account Reseller (LAR);

SHI Response:

As one of Microsoft's largest Azure Expert Managed Service Providers (MSP) and License Solution Providers (LSP), SHI offers a wide range of services and tools designed to help you transform, collaborate, protect, and optimize your environment. We handle your Cloud subscriptions and Microsoft Licensing Agreements, your software license assets, and the deployment of those assets throughout your organization. No other Microsoft LSP has received as many awards from Microsoft to recognize outstanding license tracking and program management. We have a team of Microsoft Licensing Specialists who are ready to assist you with understanding your agreements and optimizing the benefits associated with enrollment in Microsoft's Licensing Program.

SHI's Microsoft Competencies

Microsoft bestows their competencies on an organization that they deem worthy of ensuring the customer's needs by being a Microsoft-certified solution provider. A silver competency demonstrates consistent capability and commitment. A gold competency demonstrates best-in-class capability within a Microsoft solution area.

SHI currently holds several Microsoft Competencies - including Cloud Platform and Security:

Gold – Application Development
Gold – Application Integration
Gold – Cloud Platform
Gold – Cloud Productivity
Gold – Collaboration and Content
Gold – Communications
Gold – Data Analytics
Gold – Datacenter
Gold – DevOps
Gold – Enterprise Mobility Management
Gold – Enterprise Resource Planning
Gold – Messaging
Gold – Project and Portfolio Management
Gold – Small and Midmarket Cloud Solutions
Gold – Windows and Devices
Silver – Data Platform

Silver – Security(D) Be able to resell all Microsoft, Amazon Web Services (AWS), Salesforce, VMWare, Adobe Systems, and LinkedIn Corporation software products

SHI Response:

SHI meets this requirement.

(E) Maintain an on-line catalog of available software, with Indiana contract-pricing specific to each software.

SHI Response:

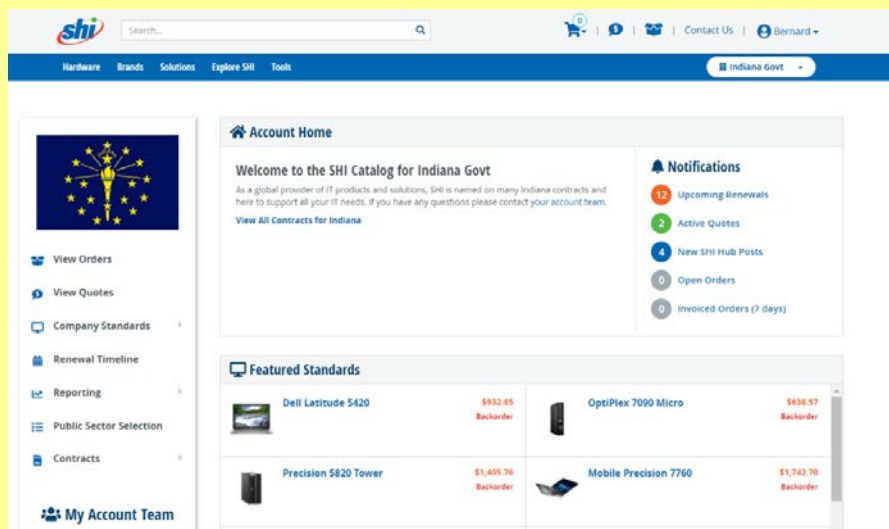
SHI.com, SHI's procurement platform, provides an efficient and intuitive way to access and procure a customized catalogue of products, and its business-to-business functionality includes innovative Custom Catalogue capabilities that provide personalized views of product information, enabling the State to find and compare products, to view key metrics (like frequently viewed products and contract or standard items), and to simplify purchasing.

With thousands of manufacturers represented, product catalogues are fully customized to reflect contracted pricing available through SHI, as well as special pricing programs for which Members are eligible, such as licensing programs or other volume programs.

(F) Maintain an on-line system for quoting, tracking, managing, and reporting all software licenses purchased by the State under this contract.

SHI Response:

SHI.com, SHI's procurement platform, provides an efficient and intuitive way to access and procure a customized catalogue of products, and its business-to-business functionality includes innovative Custom Catalogue capabilities that provide personalized views of product information, enabling the State to find and compare products, to view key metrics (like frequently viewed products and contract or standard items), and to simplify purchasing.



With thousands of manufacturers represented, product catalogues are fully customized to reflect contracted pricing available through SHI, as well as special pricing programs for which Members are eligible, such as licensing programs or other volume programs.

SHI's open architecture systems allow us to integrate with virtually any eCommerce platform, whether through market leaders or a proprietary solution. The most common applications we support include Ariba, Perfect Commerce, PeopleSoft, SAP and Oracle. In general, SHI supports systems that use cXML (commerce extensible mark-up language), or EDI (electronic data interchange) standards.

(G) Ensure the pricing for Products and the Services is made available to the governmental entities listed in Section 1.4.4 – Eligible Entities.

SHI Response:

Due to our high authorization levels with many of the State's strategic vendors, SHI can offer the best pricing and support available. Our authorizations allow us to provide best in class review of options available, including

volume purchase agreements, maintenance, support agreements, and extended warranty agreements. Our dedicated resources supporting the manufacturers, ensure you are selecting the best-in-class products and our manufacturer Solution Experts and Product Specialists will work closely with you to make sure you are selecting the best solution for your requirements

(H) Ensure that the offered discount percentages are contractual minimum discounts and may not be lowered unless agreed to by the State.

SHI Response:

Based upon the contractual agreement with the State and SHI, discounts will remain at the set rate at the time of contract.

5. Describe your proposed enrollment procedures for State agencies and other Eligible Entities.

At SHI we strive to go above and beyond the requirements of License Agreements so that contract users can receive the most benefit from their participation in the Agreement. The following are the actions that we take currently for renewal and for new enrollments, and we welcome any initiatives that would serve to improve your team's experience.

Renewals:

- Send quote 3 months in advance of the renewal;
- Schedule a call with SHI account team, SHI Licensing Executive, and specialized team members such as Microsoft Account Manager once the quote has sent;
- Send the server workbook to the State
- Host the call to discuss current environment and any changes over the past year;
- Discuss unique publisher programs such as M365 and the differences from the previous FTE model enrollment;
- Send updated quote;
- Supply new paperwork, if needed.

New Enrollments:

- Request to schedule a call with the State and key decision makers such as IT Director;
- Host the call with customer and SHI account team, SHI Licensing Executive, and publisher unique Account Manager when available to discuss current environment and goals;
- Send server workbook to the State;
- Create paperwork for the Enrollment.

6. The State is committed to keeping costs down. Describe how you will partner with the State to keep costs down through the life of the contract. Additionally, detail the contractual commitments you will make to keep costs down.

SHI is classified as a top three (3) customer with the industry's largest IT Distributors (Ingram Micro, Tech Data, and Synnex) we also maintain relationships with smaller, local distributors, and the manufacturers directly. We secure highly competitive pricing which is achieved through annual negotiations and issuing

competitive RFPs to our major distributors. With each transaction, we source from the supplier with inventory in the closest proximity to the customer, at the lowest price. Additionally, SHI has access to top-level pricing discounts via our certifications and partner rankings with almost every major OEM. There may be times when the State has negotiated a price directly with the manufacturer. SHI will compare our reseller cost to your direct price and advise you on the best procurement method. If your direct negotiated price is lower, then SHI can often purchase the product on your behalf, still allowing for the single procurement process. This sourcing routine will result in the lowest possible price to the State for every transaction.

Additionally, When SHI is involved in setting up a new Volume Licensing Agreement for any State, whether it is at the outset of a SVAR contract or anytime during the contract term, we perform extensive analyses to assist the State in understanding the different Volume Licensing Agreements available and the cost savings between the various Publisher Agreements. SHI invests resources in educating each State on the various Software Volume Licensing Agreements, along with assisting the State with any Publisher paperwork necessary to implement the Agreements. Our Software Licensing Team is fully engaged with the Account Executive and the State Procurement Officer and Contract Administrator to ensure a smooth process with their Licensing Agreements

7. Describe procedures for accommodating affiliates (such as local governments and educational entities) that are not part of State government and allowed to use the contract.

SHI's marketing plan is to ensure maximum participation from all applicable parties. The contract renewal is a good time to evaluate the plan and make changes and improvements as needed. We will work with the State on appropriate timing, and appropriate venues for any face-to-face marketing initiatives. SHI's implementation/transition plan for the new contract provides for a smooth and seamless experience for the State. We will continue to put an emphasis on educating all potential users about the advantages of the contract and facilitating any necessary steps to using the contract. We understand that continued growth in participation brings added benefits to all contract users.

SHI's marketing or outreach plan to contract users is a multi-prong approach:

- SHI's CRM System has been uploaded with every entity capable of using the contract. Each Account Executive establishes a relationship with each purchasing agent/buyer and IT administrator within the organization and update our CRM so that we can verify that they have been reached. The SHI Account Executive discusses the contract with them and provides them with contact information, website information, and contract guidelines for working with SHI. SHI's Account Executives are proactive in their approach with our customers and prospects, and they regularly engage in on-site meetings and joint phone calls with our publisher representatives.
- SHI's Inside Sales Team members walk individual customers through our www.shi.com website where customers can create quotes, purchase items, obtain order status, and generate reports of their purchases.
- SHI's marketing team subscribes our new CRM contacts to SHI's monthly newsletter, which contains helpful information on SHI's publishers, new products and promotions, changes to programs, and industry news.
- SHI participates in Statewide and local vendor events. SHI Account Executives and publisher partners meet with all available entities and discuss SHI's support plan and our partners' solutions.
- SHI works with each customer to create timely and meaningful Tech Days for individual State and local entities to attend to learn about new solutions for their IT environments.

Each of these elements come together to ensure that SHI meets or exceeds the requirements of this contract.

8. The State is looking for solutions to add new software publishers and/or products to the contract in an expedient manner, preferably avoiding amendments to include new publishers' terms and conditions. Describe your process and approach to sourcing and adding additional software publishers upon the State's request during the Contract term. In your response, specify how you will allow Eligible Entities to access new software products in an expedient manner. Additionally, include an average turnaround time to add an additional software publisher.

With over 15,000 software partners in our catalog, we feel certain we can meet the needs of the State however, if the State identifies a Publisher or Product that SHI does not currently sell, SHI will reach out to our distributors to see if they have a relationship with the Publisher. From there we will establish a connection with the Publisher to introduce ourselves and explain your need. SHI will continue to work with the Publisher to either make a one-time purchase on your behalf or complete the necessary steps to become a reseller of their products.

Our standard process for onboarding new publishers/products is to contact the Publisher or Distributor of the Product to inquire about authorization to sell that product, ensuring Cost and Operational processes are reasonable and verifiable in order to guarantee compliance. This process generally takes less than 24 hours.

Throughout this process, SHI will remain in touch with the State and keep you apprised of the steps we have taken and the status of our ability to provide the product. If we reach an impasse with the Publisher, if we do not qualify to resell the product, or if we've exceeded the timeline available to procure the product, SHI will work with the State to either identify another vendor or a similar product that we are able to provide.

SHI's process for onboarding new publishers and products ensures that the State will be protected and, to the best of our ability, satisfied.

2. Publisher Relationships

1. Describe any circumstances in which you would not be willing to do business with a software publisher if the software publisher would be willing to do business with you.

Working with Current and New Vendors — We add vendors and products to our databases every day. Our flexibility, breadth of offering, and willingness to evolve along with our customers' changing needs are unique strengths that SHI happily leverages for our customers. Upon award of the new contract, SHI will collaborate with each named publisher to ensure a smooth transition to the new contract. Additionally, we will reach out to new vendors to identify opportunities and initiatives on behalf of the State.

We help contract users to navigate through those processes for any paperwork or signatures that the publishers require of the customers. In addition, we expect that publishers have varying policies for SHI and for contract users. Some publishers have additional terms and conditions that require review, and some even have their own agreement that requires customer signatures. Typically, our Contracts Specialists review the required terms and complete any necessary paperwork. The Account Team and SHI's Catalog Team work together to add the products to the State customized on-line product catalog.

2. Provide evidence, such as a letter, from each software publisher with whom you claim to have a volume license agreement. The evidence must confirm current agreement status. Provide evidence of the partnership or certification level claimed in the chart above. This

evidence can be included as a separate attachment, but it must be referenced in the yellow text box below.

SHI has provided the file of this requirement titled Letters of Authorization the above in named 2.4 Technical Proposal.

3. Describe your approach to working with and managing niche suppliers who may not be able to contract with large publishers in a seamless manner.

With over 15,000 software partners in our catalog, we feel certain we can meet the needs of the State; however, if the State identifies a Publisher or Product that SHI does not currently sell, SHI will reach out to our distributors to see if they have a relationship with the Publisher. From there we will establish a connection with the Publisher to introduce ourselves and explain your need. SHI will continue to work with the Publisher to either make a one-time purchase on your behalf or establish a process for continued purchasing.

Throughout this process, SHI will remain in touch with the State and keep you apprised of the steps we have taken and the status of our ability to provide the product. If we reach an impasse with the Publisher, if we do not qualify to resell the product, or if we've exceeded the timeline available to procure the product, SHI will work with State to either identify another vendor or a similar product that we are able to provide.

SHI's Emerging Partners Team constantly reviews new technologies and new OEMs to offer to our customers. Additionally, SHI has OEM Support Teams, technical resources, and relationships with manufacturers to assist your organization with your specific needs concerning emerging technologies and new solution sets. SHI conducts quarterly meetings with Gartner and IDC to stay abreast of the latest and best technologies. SHI works closely with each OEM to provide new products as soon as they are available. Your organization can pre-order new products through SHI yet to be released to get them as soon as they come to market. SHI's Solutions Teams and Product Specialists will alert your Account Team of the newest and most cutting-edge technologies to make them available to your organization.

4. List all software publishers who have indicated that they will not allow you to resell their products or services. This list should flag any Software Publishers who do not do business with any general software resellers.

SHI is able to resell all Software Publishers, with the exception of Oracle. In this case we go through our other distribution channels to obtain Oracle products for our customers.

5. Provide the number of and list all additional software publishers you are able to resell the software of.

SHI has a diverse partner ecosystem, supporting over 30,000+ unique Publishers and OEMs. Leading manufacturers established SHI as an authorized partner. SHI will reach out to our distributors to determine if they have a relationship with the OEM. SHI will then connect with the OEM to introduce ourselves and explain your needs. SHI will work with the OEM to either make a one-time purchase on your behalf, or become a reseller.

Throughout this process, SHI will remain in touch with The State to keep you apprised of the status of our ability to provide the product. If we do not qualify to resell the product, or if we've exceeded the timeline available to procure the product, SHI will work with The State identify another vendor or a similar product that we can provide.

Please see our top partners below:

3M

911Inform

A10 Networks
Absolute Software
Accellion
Acer
Acronis
Actifio
Addon
Adobe
Adrem Software (NETCRUNCH)
Adtran
Aerohive
Airtame
AirWatch
Alcatel-Lucent
Alert Logic
AlgoSec
AlienVault
Allied Telesis
Altair
Alteryx
Altova
AMD
Amphenol
APC
Apple
Arcserve
Arctic Wolf
Arista Networks
Array Networks
Aruba Networks
Aryaka
ASUS
ATEN Technology
Atlassian
Attachmate (Micro Focus)
ATTO
AudioCodes
Autodesk
Avaya
Avecto
Aver
AVI Networks
AWS
Axiom
Axis
Barco

Barracuda Networks
Belkin
BenQ
BeyondTrust Software
Big Switch Networks
Birst
Biscom
Bitdefender
BitGlass
BitSight
BitTitan
Blackberry
Blackberry Cylance
Blanco
Blue Jeans
BlueCat Networks
BMC Software
Bomgar Corporation
Bose
Box
Bretford
Brocade (Broadcom)
Brother
Buffalo Technology
C2G
CA
Calabrio
Cambium Networks / Xirrus
Canon
Carbon Black
Carbonite
Cato Networks
Centrify
Century Link
Checkmarx
Check Point
Chef Software
Cherwell
Chief
Ciena
Cisco
Citrix
Clear Touch
ClearOne
CloudBees
CloudBolt

Cloudera
Cloudflare
CMT Networking
Code 42
COFENSE
Cohesity
Cologix
Commvault
Contrast Security
Corel
CoreSite
Couchbase
Cradlepoint
Crestron
CrowdStrike
Cumulus Networks
CybelAngel
CyberArk
Cybereason
CyberPower
CyrusOne
Da-Lite
DataCore
Datadog
Data-Gravity
DataMotion
Datrium
Dell
Deltapath
Dialogic
DialPad
Digi International
D-Link Systems
Docker
DocuSign
Dolby
Dropbox
Druva
DTEN
DuoSecurity
Dynabook
Dynatrace
Eaton
Ecessa Corporation
Edge Memory
ElasticSearch

Ekahau
Engenius Technologies
Enet
Entrust
Epson
Equinix
Ergotron
ERwin
ESET
Exabeam
ExaGrid
Extensis
Exterity
Extrahop Networks
Extreme Networks
f5
Facebook
Fatpipe Networks
Fiberlink
FireEye
Firemon
Five9
Fluke Networks
Forcepoint
ForeScout Technologies
Fortinet
Forward Networks
Fujitsu
Fuze
Garland Technology
Getac
Gigamon
GitLab
Globalscape
Google
Hall Research
HashiCorp
Hitachi
Honeywell
HOSTING
HPE
HP Inc.
Huawei
HVE
IBM Hardware
IBM Software

I Am Webbing
Idaptive
Idera
IGEL
Imperva
Imprivata
Incipio-Griffin
Infoblox
Infocus
Informatica
Information Builders
Infovista
Infragistics
Infrascale
Intel
InterNAP
Intuit
Ivanti
IXIA
Jabra
JAMF Software
Jive
Juniper Networks
Kaspersky
Keezel
KEMP Technologies
Kensington
Kingston
Know Be4
Kodak
Konftel
Lantronix
Legrand
Lenovo
Lexmark
LG
Lifesize
Lightspeed Systems
Linksys
LogicMonitor
Logitech
LogMeIn
LogRhythm
Lookout
luxul
Malwarebytes

MAPR
McAfee
Mellanox
MicroFocus
Micron
Microsemi
Microsoft
Microsoft - Hardware
Middle Atlantic
Mimecast
Mist
Mitel
MobileIron
MongoDB
Monnit
Morpheus Data
Motorola
MSi
Nasuni
NEC
NetAlly
NetApp
NetBrain
Netgear
NetIQ (Micro Focus)
NetMotion Wireless
NetScout Systems
Netskope
Neverfail
Newline
New Relic
Nexsan
Nexthink
NimbleStorage
Nitro
Nokia
Novell (Micro Focus)
Novoptel
Nozomi Networks
NS1
NSFOCUS
Nuance
Nux
Nutanix
Nvidia
OKI

Okta
OneLogin
Onramp
OpenGear - A Digi Company
OpenText
OPSWAT
Oracle
Otterbox
Overland Storage
Owl Labs
Paessler AG
Pager Duty
Palo Alto Networks
Panasas
Panasonic
Panduit
Panorama Antennas
Parallels
Peak10
Pentaho
Peplink
Pexip
PGP
Philips
PhoenixNap
Ping Identity
Pivot3
Platfora
Pluribus Networks
PNY
Poly (Plantronics - Polycom)
Poly (Plantronics - Polycom)
Poly (Plantronics - Polycom)
Progress
Promethean
PromiseTechnology
Proofpoint
Pulse Secure
Puppet
Pure Storage
Qlik
QLogic
QNAP
Qualcomm
Qualys
Quantum

Qubole
Quest
Qumulo
RagingWire
Rapid7
Raritan
Redgate
RedHat
Redsky
Rhombus Systems
Ribbon Communications (Sonus Networks)
Ricoh
Ring Central
Riverbed
RP1Cloud
RSA
Rubrik
Ruckus (Commscope)
Safeware
Samsara
Samsung
Sangoma
SAP Crystal Solutions
SAS
Savvius
Scale Computing
Seagate
Seagull Scientific
Security Scorecard
Sentinel One
Server Central
servertech
Service Now
SEVONE
Sharp
Sierra Wireless
Silk
Silobreaker
Silver Peak Systems
SimpleWAN
Simplivity
SingleHop
Skybox Security
Skytree
Smash
Smartbear Software

Solarflare
Solarwinds
SonicWALL
Sony
Sophos
Sparx Systems
Spectra
Spirent
Splunk
Star Tech
STEALTHbits
Stem Audio
Stor Magic
Storage Craft
Sun
Super Micro
SUSE
SVT
Symantec
Synology
Tableau Software
Targus
TBI
TeamViewer
TechSmith
Telx
Telylabs
Tenable
Teradata
Thales
Think Cell
Thousand Eyes
Thycotic
Tibco
Tintri
TP-Link
Transition Networks
Trend
TRENDnet
Tripp Lite
Tripwire
Tufin
Turbonomic
Turing Video
Ubiquiti Networks
Unitrends

V-Tech
Vaddio
Valcom
Varonis
VAST Data
Veeam
Ventev
Veracode
Veritas
Verkada
Versa Networks
Vertica
Vertiv (Liebert/Emerson/Avocent)
Viavi Solutions
ViaWest
Vidyo
Viewsonic
Violin Memory
VMware
VSS Monitoring
Watchguard Technologies
Western Digital
Wiremold
Xerox
Xplore
Yamaha
Yealink
Zebra
Zendesk
Zerto
Zoho Corporation
Zoom Video Communications
Zotac
Zscaler
Zyxel

3. Limited Consulting Services for Software and Services Provided by the Software Publisher

1. Detail the limited consulting services that you can provide to the State. Please do not include any cost information in your answer.

SHI's Presales Partner Specialists are the day-to-day subject matter experts in their partner's products, programs, and processes. They can assist with part numbers, quotes, general licensing questions, ordering issues and are readily available to speak with customers. Because they have a wide range of knowledge in their particular partner, they can help customers uniquely address their own needs. With years of tenure and experience, we have seen it all and can help our customers through many problem partner issues. They can also help scope where a customer may need assistance and bring in the appropriate other resources.

Our value-add to our customers can be summarized as:

- Being the subject matter expert (SME) for our customers and their unique partner's licensing needs.
- Handling renewal management for our customers on unique and diverse 150 partners.
- A deep understanding of partners' programs and pricing provides the most cost-effective licensing solutions for our customers.
- Being a liaison for a customer with complicated and challenging to do business partners.
- A customer-first approach to any customer need.
- Our Presales Business Development Managers are proactive resources who help our sellers, and our customers scope out new business opportunities.

Our 85-member team consists of:

- 13 Directors, Senior Managers, and Managers
- 14 Senior and Presales Business Development Managers
- 50 Senior and Presales Partner Specialists
- 5 Presales Licensing Specialists
- 3 Technical Presales Specialists

While our people are experts in multiple partner technology, we take a customer-first approach to make sure we look at each customer's needs uniquely. We take tremendous pride in being able to help a customer in their licensing journey.

2. Confirm your understanding of the Scope of Work development process for limited consulting services, as outlined in RFP Section 1.4.5.

SHI understands and complies with the Scope of Work development process for limited consulting services outline in Section 1.4.5.

4. Staffing and Account Management

1. Describe the composition of the Account Team that will provide services under this Contract. Provide an organization chart depicting the Account Team and showing how the Account Team fits into the overall organization. Indicate the different roles and the number of FTEs dedicated to this Contract who will occupy each role. The chart must also indicate the location (State or country, if not in the United States) of each member of the Account Team. The names of the Account Team members must be shown on the organization chart, and their resumes must be included in the proposal. It is desirable that responses to this section demonstrate that the Reseller is organized and staffed to be able to provide high quality service under the Contract.

Within these purposes, we clearly recognize the need for exceptional Relationship Management, including in partnership with local units of Indiana government.

The first step to ensure success is to define collaborative and clear SLAs that meet IOT's needs. As standard practice, we respond to email and phone requests within two to four hours. We process orders within 24 hours of receipt (unless additional information is required), and we provide daily updates on any pending requests.

We are confident that our Account Team will fully support daily needs and provide accessible, courteous, responsive, and seamless customer service; and we encourage escalation when a higher level of support is needed.

Our State of Indiana Account Team is comprised of the following team members:

Vice President SLG – Michael Bench. Mike is an invaluable part of the SHI team for 21 years. Mike represents the Sunshine State with equal parts enthusiasm and steadfastness. As our Regional director for the East, he successfully builds solid, sustainable, and diversified business within the region; oversees the comprehensive management of his team of AEs and DMs, and establishes priorities and processes to execute SHI's strategy on a yearly basis.

Over the course of his 20+ years at SHI, Mike has helped his region grow from less than \$10 million in business to over 40 times that amount. What began as an Inside Sales position in 1999 has become – with perseverance and tireless effort –lifelong career for Mike, and his dedication to SHI and our customers is still unyielding. technology and with distance learning.

District Sales Manager – Josh Pfau. Josh is responsible for the team of Account Executives who cover our State and Local Government customers for the State of Indiana, Wisconsin, and Illinois. Josh has 14 years' experience working in Sales, and eight of those come from the IT industry, where Josh worked in multiple capacities to become a versatile and thoughtful sales representative. His colleagues describe him as proactive, adept, and deeply knowledgeable, with strong creativity and a spirit for innovation. As a leader, Josh ensures the people around him have the tools they needed to succeed. Josh will assist your primary Account Executive, Bernie Morgano, to determine ways of increasing overall customer support and satisfaction.

Account Executive, Indiana State Government – Bernard Morgano. Bernard (Bernie) oversees the relationship between State Government accounts and SHI. As an Account Executive, he will assist the State with the selection of information technology products and services, assist in the procurement process, and create efficiencies and cost savings wherever possible. A partner to the State, Bernie works directly to maximize contract usage, ensure customer and partner compliance, and to provide world-class support to both procurement and IT customers. Bernie lives in Fishers, Indiana and has a 25-year background in Sales and Account Management in the IT industry.

Field Solutions Engineer – Nathan Farris. Nathan, a local to the Indianapolis area, travels with the SHI Account Executives in market and guides clients in aligning their needs with SHI's broad portfolio of products and services. Drew emphasizes solution-based opportunities, with a focus on leveraging Cloud, Data Center, and Security technologies to help organizations achieve their goals.

Inside Account Managers (IAM). Working in partnership with the Account Executives in the field, the IAMs maintain direct relationships with the customers and have the responsibility of ensuring customer satisfaction. In addition, one of their primary responsibilities in auditing and ensuring order validity to protect customers against fraud. Other functional areas such as pricing, availability, order entry, tracking, returns, product information, and expedites are all integral parts of their daily activities. IAMs execute Account Executives' plans for each customer. We will evaluate the team regularly and add members as needed to keep customer service exceeding the State's expectations. The State's dedicated Inside Account Manager Team is comprised of:

- Jenna Criscuolo
- Bobby Celentano
- Precilla Lin
- Christine Aloï

The team can be reached by emailing TeamSHI@shi.com or by calling 888-744-4084

This team is managed by Tyshon Crawley Tyshon.Crawley@shi.com or by calling 732-564-8117

SM/SLED Sales Team. Augmenting the Indiana Account Team, our Small/Medium SLED (SM SLED) division is focused on supporting the needs of smaller K-12, local government, and higher education institutions across the country to ensure personalized attention regardless of customer's size. In this case, we have defined small as a K-12 district with 7500 Students or less, a higher education institution with 1500 students or less, or a city/town with a population of 50,000 or less. These customers often are overlooked by large resellers yet have the same need to stay current with technology as their larger counterparts. This division is based out of our global headquarters in New Jersey and is supported by a dedicated team of Inside Account Executives (IAEs) who support the State's needs in this space from start to finish. Please refer to the table below.

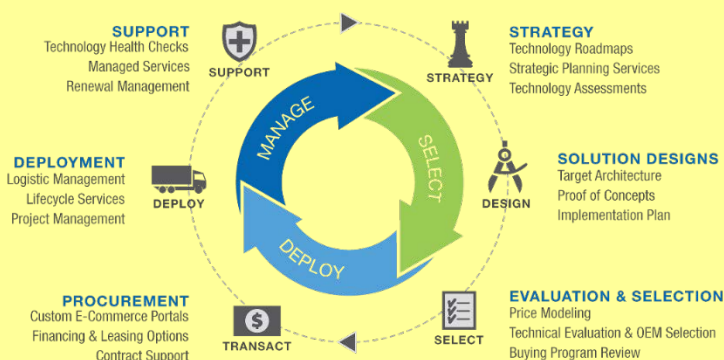
Adam Pervez	Adam.Pervez@shi.com	732-652-7678	IN	K12
Charlie McClelland	Charlie.McClelland@shi.com	732-652-0289	IN	Government
Cody Smith	Cody.Smith@shi.com	732-652-3077	IN	Government

- Describe how you will ensure that the Account Management team is successfully meeting the needs of the State throughout the duration of the Contract.

SHI provides each customer with a dedicated Account Team. The members of the teams are focused on specific verticals within public sector (i.e. State government, local government, and education). These teams bring expertise in IT solutions and tremendous experience with public sector contracts to the State and each participating entity or agency. This means that SHI is able to deliver the following benefits to our customers:

- A keen understanding of the unique challenges government and education customers face.
- Best practices around software licensing for individual customers, as well as licensing programs that recognize cumulative spend per entity or under the agreement as a whole.
- Specialized customer service for small, medium, and large organizations.

Regardless of the customer type or the size of the organization, SHI understands that in order to bring the right solution to a customer, we need to first understand that customer's vision. Once we understand their goals, our pre-sales licensing and technical support staff help design a strategy that is suitable to the customer's current environment, while ensuring it will scale to meet their future needs. When the customer is ready to move forward, SHI will help to ensure that the customer is procuring those products using the most advantageous pricing programs and at the most aggressive possible cost. We then follow through with deployment services and support to ensure that the solution the customer procured is working as expected.



In short, SHI's Public Sector Account Teams offer the experience and the expertise to help the State to select, deploy, and manage products and solutions needed to further their organizations' missions.

3. Describe how you can assist Eligible Entities with the complexities related to license agreements.

As described throughout this response, the State will have a dedicated account team, led by Bernie and supported by all of our software team. Together this team will be able to assist all Eligible Entities with any of their license agreement needs and assist with any complexities associated with those individual agreements.

SHI has a diverse partner ecosystem, supporting over 15,000 unique publishers today. SHI has invested substantially in both Pre and Post Sales resources to better service its customers and their long-term software needs and solutions.

SHI has the expertise in managing the varied features of the Publisher Licensing Programs. Our award-winning team of Software and Licensing Specialists is available to assist you with selecting your licensing programs, executing the agreements, and supporting the agreement lifecycle. When it comes to software, SHI's expertise is second to none.

In response to our customers' growing needs around expiring warranties, support agreements, and product maintenance programs, SHI created an organizer tool: The Renewal Organizer, available as a value add to SHI customers only, and at no additional cost, compiles your technology renewals in a centralized, rolling **36-month** timeline for simplified budgeting and renewal management. The tool is delivered via an interactive on-line portal, with 24/7/365 availability.

4. Describe procedures for complaint resolution and identify the staff available to resolve service complaints, billing problems, etc.

SHI realizes the need for exceptional Relationship Management and responses (including technical issues, product delivery, billing, and requests regarding Statements of Work). We also understand the need for efficient communication in order to keep your projects moving forward smoothly.

The first step to ensure success in these areas is to define collaboratively and clear SLAs that meet all of your needs. It is standard practice for us to respond to email and phone requests within two to four hours. We process orders within 24 hours of receipt (unless additional information is required), and we provide daily updates on any pending requests.

We are confident that our Account Team will fully support both daily needs and provide accessible, courteous, responsive, and seamless customer service. If the State require a higher level of support, we encourage them to escalate their request.

The following table articulates our standard procedure with response times:

Customer Request	SHI Commitment
Call answered in a timely manner	SHI has team phone lines where all members of the support team are logged in, and calls are answered in a round robin method, by members who are not on a call. In the instance all members are helping other customers, calls will be directed to voicemail. If the customer has an urgent request, they can escalate their request to the Inside Sales Team Manager or Account Executive for immediate assistance.
Voicemail response	All voicemails are answered or returned within two to four business hours.
Quotes Turnaround	Quotes from the customer's standard catalog, are fulfilled within eight business hours.

	<p>Quotes requested for items which are third party source/weird ware items, the Inside Account Managers (IAMs) will take the following action:</p> <p>Reply to customer request within two to four hours, confirming receipt of request</p> <p>Relay to the customer they are working on their request and send notification of additional time the request may take due to external factors – such as awaiting vendor response or if additional information from the customer is required</p>
Order entry accuracy	SHI accurately enters purchase orders into the system 98 percent of the time based on monthly data
Orders entered in a timely manner (including order confirmation)	SHI's standard SLA for order entry is within 24 business hours
Time from in stock product shipment to delivery	Standard products with no customization are typically delivered within five days. Any possible delays based on total quantity ordered or restrictions from the OEM will be communicated with the State at the time of quote or order placement and SHI will keep the State informed of estimated delivery.
Percentage of devices DOA	If an item is DOA, SHI will work with OEM to provide a working product within the OEM's DOA policies
Order received to product shipment	The total turnaround from order receipt to shipment for 90 percent of all standard orders is 15 days. Should we expect a delay due to large quantity, complexity, product constraint, etc. SHI will communicate the expected timeline with the State and follow up consistently until the product is delivered.

5. Provide an incident escalation path, showing the name, contact information, and role of individuals to whom problems should be escalated if they are not resolved by primary assigned contacts or by escalation to the next level.

We are confident that the Account Team will be able to fully support the daily needs of the State and provide accessible, courteous, responsive, and seamless customer service, but if at any time the State feels that you need additional support, we encourage you to escalate to the next level for support.



All new requests & customer service issues should be sent to TeamSHI@shi.com or by calling 888-591-3400.

If the State's IAM team cannot resolve issues within 24-48 hours or the matter is urgent, please contact Account Executive, Bernard Morgano

If issues are still not addressed after 72 hours, please reach out to Josh Pfau.

Please note the above are guidelines and suggestions for effective escalation of issues. However, if you feel the need to escalate or inform SHI management of a particular concern or issue, please contact a member of the management team directly at any time.

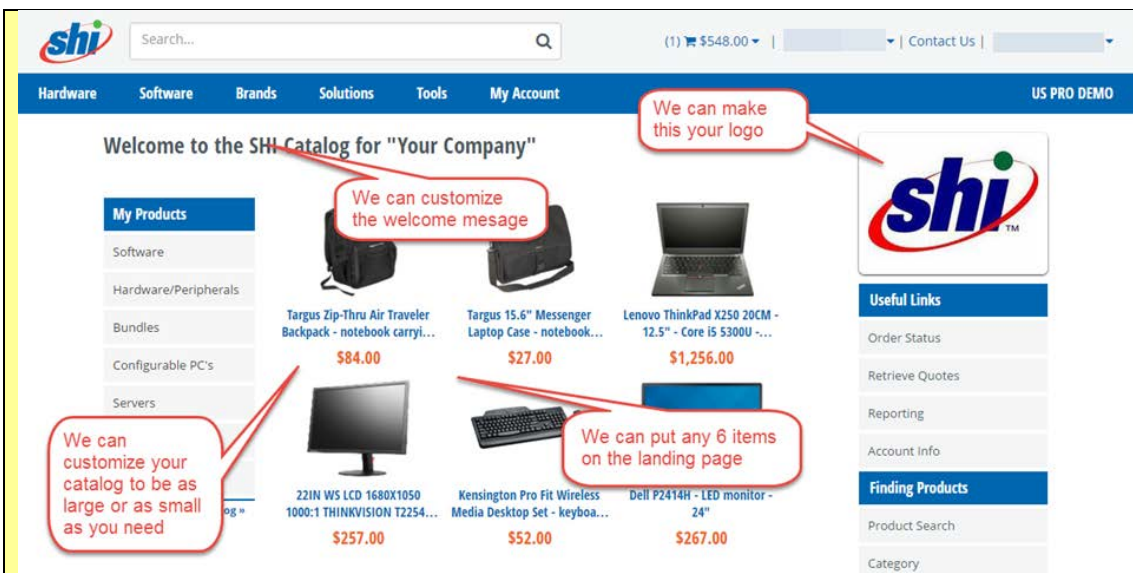
5. Account Management and Ordering Tools.

1. Describe the features and functionalities of your online catalog. In your response, specify how your proposed solution meets all of the State's requirements in Section 1.4.8, A.

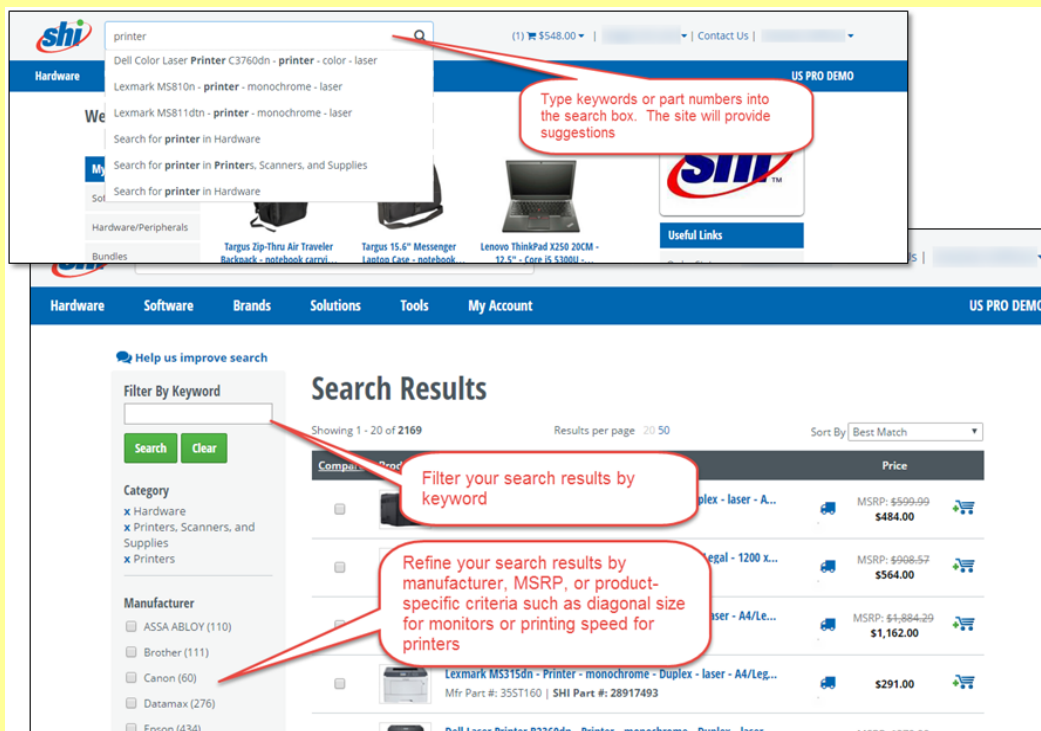
SHI.com, SHI's procurement platform, provides an efficient and intuitive way to access your customized catalogue of products and to procure any of those products at any time. SHI.com's business-to-business functionality includes innovative Custom Catalog capabilities that provide personalized views of product information and enable you to find and compare SHI's products, to view key metrics (like frequently viewed products and contract or standard items), and to simplify purchasing. See "SHI eCatalog" setup example in Attachments.

Custom Catalog

Your catalog can be as broad or as narrow as you need! With thousands of manufacturers represented, your product catalog is fully customized to reflect contracted pricing available through SHI, as well as special pricing programs for which you are eligible, such as licensing programs or other volume programs.



Within your custom procurement site, searching capabilities are broad and include Keyword; Manufacturer; and Product Category/Type searches. Two examples are shown below in screen shots:



Because your procurement site is customized specifically to your organization's needs, SHI.com reflects your specific standards (preferences, favorites, products, and so on). Some examples are shown below in the following two screen shots:

shi Search... (1) \$548.00 | Contact Us | US PRO DEMO

Hardware Software Brands Solutions Tools My Account

Welcome to the SHI Catalog for "Your Company"

My Products

- Software
- Hardware/Peripherals
- Bundles
- Configurable PCs
- Servers
- Tablets (Config)
- Config Test

[view entire catalog >](#)

Useful Links

- Order Status
- Retrieve Quotes
- Reporting
- Account Info

Finding Products

- Product Search
- Category

Targus Zip-Thru Air Traveler Backpack - notebook

Targus 15.6" Messenger

Lenovo ThinkPad X250 20CM - 12.5" - Core i5 5300U - ...

22IN WS LCD 1600:1 THINKVISION T2254...

Media Desktop Set - keyboard...

Dell P2414H - LED monitor - 24"

\$257.00

\$52.00

\$1,256.00

\$267.00

You can also access this area by clicking Tools > Favorites

We can put your company standards under My Products. The folders can be customized to group products together based on your preferences

shi Search... (1) \$548.00 | Contact Us | US PRO DEMO

Hardware Software Brands Solutions Tools My Account

Corporate Standards

For your easy reference and ordering, click on any of the below links to take you to the product details page for that item.

[Add to Cart](#) [Select All](#) [Deselect All](#) [Sort By](#) [Most Recently Added](#)

Product	Price	Part #	Availability	Quantity
<input type="checkbox"/> Targus 15.6" Messenger Laptop Case - notebook carrying case	\$27.00	15206408		1 Add to Cart
<input type="checkbox"/> Targus Zip-Thru Air Traveler Backpack - notebook		836572		1 Add to Cart

Click the hamburger menu to view the available groups in a pop out menu

Please review the Favorites Help document for more detailed information

Click on the product name to view more details for an item

Click the truck icon to view real-time inventory

In order to view Product Details, you can click on the name of the product you're reviewing, click on icons (like the truck icon, shown in the screen shot below), or read narrative detail.

shi Search... (1) \$548.00 | Contact Us | US PRO DEMO

Hardware Software Brands Solutions Tools My Account

Lenovo ThinkPad X250 20CM - 12.5" - Core i5 5300U - Windows 7 Pro 64-bit / Windows 8.1 Pro 64-bit downgrade...

Category: Notebook computers.

Product Pricing: **\$1,256.00**

Availability:

Quantity to Order: 1

[Add to Cart](#) [Add to My Favorites](#)

Check real-time inventory

Clicking on the name of the product will bring you to the product details page for that item

Customers Who Bought These Item(s) Also Bought

TopSeller Onsite Warranty - extended for agreement - 3 yrs - on-site

PRO DOCK - 60W FOR THINKPAD

Case Logic 14" Laptop Backpack - notebook carrying backpack

Kingston SSDNow V300 - solid state drive - 240 GB - SATA3.0S600

\$174.00

\$205.00

\$37.00

\$79.00

Scroll to see more item details and specifications

Overview Specifications

Product ID: 2991346

Description: Lenovo ThinkPad X250 20CM - Ultrabook - Core i5 5300U / 2.3 GHz - Windows 7 Pro 64-bit / Windows 8.1 Pro 64-bit downgrade - pre-installed: Windows 7 - 8 GB RAM - 500 GB HDD (16 GB SSD cache) - no optical drive - 12.5" 1366 x 768 (HD) - Intel HD Graphics 5500 - 802.11ac - WWAN upgradeable - TopSeller

Getting a Procurement Quote

Once you've determined your procurement items, you have the option to save the items as a quote or to send your shopping cart to your SHI Sales Team to obtain an "official" SHI quote.

The screenshot shows the SHI.com shopping cart. At the top, there's a search bar and a cart summary showing (2) items for \$1,522.91. Below the navigation bar, a message states "Your recent changes are highlighted." The cart contains two items:

Product	Unit Price	Quantity	Extended Price	Remove
Adobe Acrobat Standard DC 2015 - license Product Id: 30202195 Mfr Part #: 65258978AA03A00 Added On: 4/13/2016 1:51 PM	\$274.00	2	\$548.00	
Lenovo ThinkCentre M73 1086 - SFF Product Id: 27668225 Mfr Part #: 10B60008US Added On: 4/13/2016 5:39 PM	\$974.91	1	\$974.91	

Annotations include:

- A red arrow pointing to the "wrench" icon next to the Lenovo item, with a callout: "Click the arrows to view the options you selected for your configured system".
- A red arrow pointing to the "Save as Quote" button in the "Shopping Cart Actions" sidebar, with a callout: "You can save your cart as a quote".
- A red arrow pointing to the "Check Out" button, with a callout: "Click here to begin Check Out".

A saved quote remains valid on SHI.com for thirty days. At any time within those thirty days, you can change or add to the items saved in the quote or send the contents of the quote (with saved pricing) back to the shopping cart to finalize the purchase.

The screenshot shows the "Quote List" and "Quote Details" sections. The "Quote List" has input fields for "Quote #" (1135818) and "Email" (amanda@example.com), with "Search" and "Clear" buttons. A callout says: "To retrieve your published quote, enter the quote number and the email address, then click Search".

The "Quote Details" section shows:

- Quote #: 1135818
- Quote Name: test
- Created Date: 4/8/2016 5:20:00 PM
- Expiration Date: 4/30/2016
- Total: \$17.45
- Comments:
- Contact, Company, Email, Phone, Fax, Address (all blurred)

Below the details is a table of items in the quote:

Product Id	Product Details	Quantity	Price	Extended Price
24990112	HP 932 - CN057AN - print cartridge - black Manufacturer: HP, Inc. Mfr Part #: CN057AN#140	1	\$17.45	\$17.45







At the bottom, there's a "Total: \$17.45" and buttons for "Add to Cart", "Print View", "Delete Quote", and "Back". A callout for the "Add to Cart" button says: "Click Add to Cart to move the items from the quote into your cart. You can make changes once the items are in your shopping cart".

Configuring your Product or System

The process of configuring a product or system is simplified by SHI.com's consistent product display – showing a picture, product summary, and pricing before any options. The "wrench" icon is hyperlinked to configuration options for each product, as seen in the screenshots below:

Configurable PC's

[Add to Cart](#)
[Select All](#)
[Deselect All](#)
[Sort By](#)
[Most Recently Added](#)

	Product	Price	Part #	Availability	Quantity
	 HP 800Eo All-in-One	\$1,065.00	5317		Select the item to configure
	 HP ProBook		5313		Select the item to configure
	 Lenovo ThinkCentre M73 10B6 - SFF	\$652.00	111		Select the item to configure

The blue wrench indicates that a product is a configurable system

SHI Search... (1) \$548.00 | Contact Us | US PRO DEMO

Hardware Software Brands Solutions Tools My Account

Help us improve search

Filter By Keyword




Search Clear

X 10B60008US

Category

Search Results

Showing 1 - 2 of 2 Results per page 20 50 Sort By Best Match


Compare	Product Details	Price
	Lenovo ThinkCentre M73 10B6 - SFF - 1 x Core i5 4570 / 3.2 GHz - RA... Mfr Part #: 10B60008US SHI Part #: Z7668225	\$652.00  

The blue wrench also appears on the search results page

Sometimes, getting a useable system quickly may be more important than obtaining a particular option or upgrade that would delay the production of the machine. As options are selected, availability of each configuration is updated automatically; and as components are added or removed, shipping is also re-calculated. Consequently, SHI.com allows you to make informed decisions based upon your particular needs. See the screenshot below for an example of this process:

Hardware Software Brands Solutions Tools My Account US PRO DEMO

HP ProBook 640 G1 - 14" - Core i5 4310M



- HP ProBook 640 G1 - 14"
- Core i5 4310M
- Windows 7 Pro 64-bit / Windows 8.1 Pro downgrade
- 8 GB RAM - 320 GB HDD

Base System Price: \$815.00
Price as Configured: \$1,570.00
Quantity to Order: 1 [Add to Cart](#) [Print](#)

System Options

Configuration

- Image for Laptops (+ \$19.00)
- PC Configuration: Asset Tagging & Reporting - Per 1x Unit (+ \$3.00)
- PC Configuration: Custom BIOS Adjustments (+ \$6.00)
- Custom Configuration: HDD Encryption - Per 1x drive / Custom (+ \$12.00)

Warranty

- Electronic HP Care Pack Next Business Day (+ \$593.00)

Options

- HP 2012 90W Docking Station - Docking station - US (+ \$122.00)
- C2G Cat5e Snagless Unshielded (UTP) Network Patch Cable - patch cable - 3.1 m - (+ \$5.00)
- Acer V246HLBD - LED monitor - 24" (+ \$136.00)

We can customize the description and specifications

Additional items can be required or optional based on your standards

Price as Configured will update as options are selected

HP ProBook 640 G1 - 14" - Core i5 4310M
Base System Price: \$815.00
Price as Configured: \$1,570.00
[Add to Cart](#)

Checkout Process

SHI provides an easy-to-use Checkout Process that can also be customized to your specifications:

- Users can save addresses to an address book for easy selection of the appropriate ship-to address;

- Custom Data Collection—we will create fields to collect information you need about the purchases your employees make (department, project code, cost center, and so on);
- For our Terms Customers—enter a PO number and for our Credit Card Customers—use the security of PayPal to complete your purchase;
- See the freight and estimated taxes based on the shipping address entered.

Examples of checkout are provided below:

This screenshot shows the 'Required Ordering Information' section of the SHI checkout process. It includes fields for shipping address, division, end user name, email, and phone. A 'File Upload' section allows users to attach a file. A 'Your Shopping Cart' sidebar on the right displays items like 'Lenovo ThinkCentre M73 9086-SM'. Red callout boxes provide additional context: 'Each user can create their own address book by default. Otherwise, we can pre-load your addresses on to the site', 'We can set up custom checkout questions for your account. Questions can be optional or mandatory.', and 'Clicking the Finish button will submit your order to the sales team.'

This screenshot shows the 'Order Details' section of the SHI checkout process. It includes fields for shipping address, division, end user name, email, and phone. A 'Your Shopping Cart' sidebar on the right displays items like 'Lenovo ThinkCentre M73 9086-SM'. Red callout boxes provide additional context: 'The final page of checkout allows you to review the contents of your cart and the answers to the checkout questions before submitting your order' and 'Clicking the Finish button will submit your order to the sales team.'

Some companies require that additional information be captured with each hardware purchase. Therefore, SHI has designed an “interview page” to collect pertinent information.

This screenshot shows the 'Required Ordering Information' section of the SHI checkout process, which includes additional fields for 'Cost Center', 'End User Name', 'End User Email Address', and 'End User Phone'. A 'Your Shopping Cart' sidebar on the right displays items like 'InterBase 2007 SMP Server Edition - license' and 'Lenovo ThinkPad T430'. Red callout boxes provide additional context: 'Shopping cart contents', 'Users can save address to their profiles', and 'Questions can be customized using drop down boxes, radio buttons, and text fields.'

Approval Routing

Only authorized users within your organization can submit orders on SHI.com. However, many companies allow their employees to request products, but not to place orders. To accommodate, SHI provides approval routing through SHI.com. With support for as many levels of approval routing as required by your organization, requisitions are forwarded to the appropriate people for approval.

Once an order is approved, the requestor (and anyone else listed to receive notices) will receive an email confirming approval; the order will then upload into SHI's internal order processing system.

Order Status

SHI.com provides a wide range of search options to locate quickly and easily the order in which you are interested.

Search for:
Open and Recently Shipped Orders
Open and Recently Shipped Orders
Orders Placed in last 6 months
Order Number
Date Range
PO Number
Serial Number
Invoice Number
Placed By:
Quick Order Search

Order Number	Ship To Name	Total	Status	Items
--------------	--------------	-------	--------	-------

The following screen shot shows the order search results.

Order #	Date Ordered	PO Number	Ship To Name	Total	Status	Items
GS00103592	1/29/2014	15943	SHI Corporation	\$1,150.00	Invoiced	• 36A Black Cartridge Forlaserjet P1005 Dual Pack
GS00102473	1/22/2014	15835	SHI Corporation	\$1,150.00	Invoiced	• HP - Toner cartridge - 1 x yellow - 8000 pages • HP - Toner cartridge - 1 x magenta - 8000

Integration with eCommerce

SHI's open architecture systems allow us to integrate with virtually any eCommerce platform, whether through market leaders or a proprietary solution. Ariba, Perfect Commerce, PeopleSoft, SAP and Oracle are the most popular applications supported by SHI. In general, SHI can support systems that use cXML (commerce extensible mark-up language), or EDI (electronic data interchange) standards, including a wide range of applications and proprietary systems.

In addition, SHI supports the following Punchout types:

- Ariba Punchout
- Coupa
- ePlus Procure+
- Hubwoo
- Oracle OAG and cXML Punchout
- Perfect Commerce Roundtrip
- PeopleSoft Direct Connect
- SAP OCI Roundtrip

- Scquest
- Verian ProcureIT

2. Describe the features and functionalities of your account management website and data system. In your response, specify how your proposed solution meets all of the State's requirements in Section 1.4.8, B.

SHI understands that it can be a challenge for organizations to proactively track all expiring IT maintenance and support agreements. With inconsistent renewal dates across manufacturers and/or products, some organizations may rely on the publishers and manufacturers to provide renewal notification.

In response to our customers' growing needs around expiring warranties, support agreements, and product maintenance programs, SHI created an organizer tool: The PRO Renewal Organizer, available as a value add to SHI customers only, and at no additional cost, compiles your technology renewals in a centralized, rolling **36-month** timeline for simplified budgeting and renewal management. The tool is delivered via an interactive on-line portal, with 24/7/365 availability. Each renewal box will contain information relevant to that renewal such as:

- Contract start date
- Contract end date
- Contract Number
- Customer PO

Through this tool we are able to offer the State proactive management of maintenance, warranty, and support plans that will save both time and money for you. All products purchased through SHI with an expiration date of any kind will automatically be loaded into the State's renewal organizer. Then, quotes will automatically be sent to the States 90 days before the expiration of the service. [The State's account team then actively works with the end user to go over options. Regular follow up will continue until the PO is placed or the end user indicates that they are no longer interested in renewing the maintenance or support agreement.

The following screenshot is an example of what a customer can expect to see using the PRO Timeline:

1. Users can click the Node (Ex. Autodesk renewal) to show past history of the original order.
2. Users can click the reporting icon to run an in-depth report on the PRO Renewals. Reports can be exported and emailed to a co-worker as well.

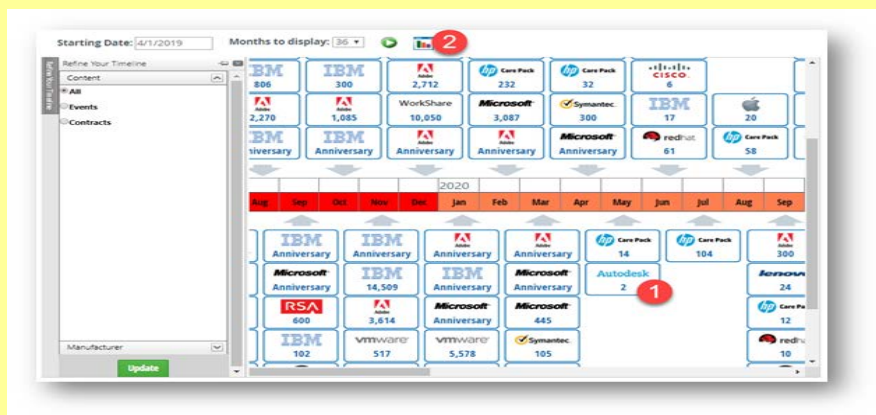


Figure 1 Renewal Organizer Example

Through the Renewal Organizer, SHI provides visibility and clarity around renewals to the State complementing the workflow of your own software and hardware renewal lifecycle efforts. These efficiencies support our customers' existing operating processes, and in some instances SHI's Renewal Organizer service even replaces or fills a void in our customers' existing workflows. If that State takes advantage of our PRO timeline it will receive the following benefits:

- Improved management of technology and renewals
- Improved budgeting and ordering efficiencies
- More support (road maps, licenses options, potential for volume purchasing)
- Reduced overall maintenance spend (e.g., contractual vs. transactional buying programs, individual purchases vs. leveraging cumulative spend, etc.)
- Improved publisher negotiation position

There are dozens of built-in dashboards and reports in our Data Insights platform, and we can create customized views as needed by our customers.

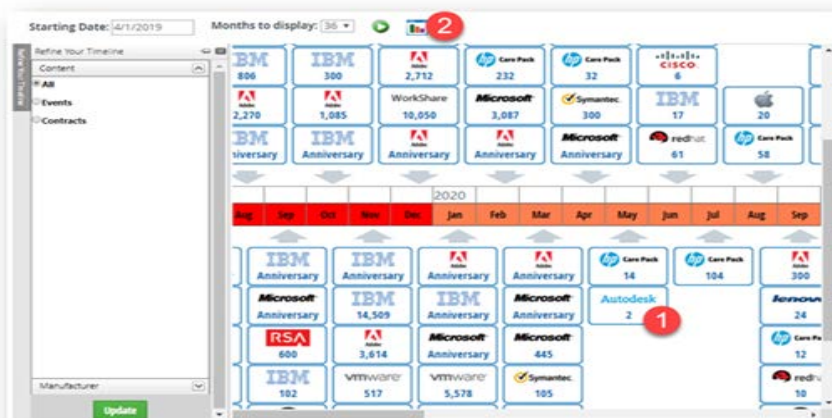
3. Describe the features and functionalities of your license portal that will allow the State to view its purchases, associated license numbers and keys, as well as expiration dates.

The PRO Renewal Organizer, described above, is delivered via an interactive on-line portal, with 24/7/365 availability. Each renewal box will contain information relevant to that renewal such as:

- Contract start date
- Contract end date
- Contract Number
- Customer PO

The following screenshot is an example of what a customer can expect to see using the PRO Timeline:

1. Users can click the Node (Ex. Autodesk renewal) to show past history of the original order.
2. Users can click the reporting icon to run an in-depth report on the PRO Renewals. Reports can be exported and emailed to a co-worker as well.



Through the Renewal Organizer, SHI provides visibility and clarity around renewals to the State complementing the workflow of your own software and hardware renewal lifecycle efforts. These efficiencies support our customers' existing operating processes, and in some instances SHI's Renewal Organizer service even replaces or fills a void in our customers' existing workflows.

There are dozens of built-in dashboards and reports in our Data Insights platform, and we can create customized views as needed by our customers.

4. Describe any additional proposed software tools you will use to provide the services listed in the Scope of Work.

Using ReportFactory, SHI's on-line reporting tool, the State has the ability to generate license spend reports in many ways:

- Global Summary - Perfect for the Contract Administrator, the Global Summary report summarizes all of the purchases under a particular agreement(s) or enrollment(s).
- Organizational Program Summary — This report provides part number purchase summary based upon business unit, location or other customer defined entity.
- VPA Milestone — This report provides a summary of your purchases per licensing program for contract milestone comparisons - by point value, quantity, or dollar value, depending upon your contract terms.
- Maintenance Renewal — Maintenance Renewal report provides advance notice when maintenance purchases are expiring.

These reports are available in any time frame that you request (i.e. 30 days or 60 days in advance), to provide you with enough time to budget your renewals, evaluate which renewals are necessary and which are no longer in effect, and to place the renewal order with SHI.

5. Please describe the potential for your solution to integrate with PeopleSoft. Please highlight PeopleSoft integration points (including data points and technology tools). Please also include prior PeopleSoft integration experience with other clients, if any.

SHI's open architecture systems allow us to integrate virtually any eCommerce platform, whether through market leaders or a proprietary solution. ServiceNow, Ariba, Perfect Commerce, PeopleSoft, SAP, and Oracle are the most popular applications supported by SHI. In general, SHI can support systems that use cXML (commerce extensible mark-up language), or EDI (electronic data interchange) standards. This includes a wide range of applications and proprietary systems.

SHI supports the following Punchout types:

- Ariba Punch out
- Coupa
- ePlus Procure+
- Hubwoo
- Oracle OAG and cXML Punchout
- Perfect Commerce Roundtrip
- PeopleSoft Direct Connect

- SAP OCI Roundtrip
- JAGGAER (Formerly Scquest)
- Verian ProcureIT

SHI API endpoints are available for getting catalog information, posting Purchase Order Requests, and getting order updates (status and shipment details).

SHI builds custom catalogs to support the unique business needs of our customers.

Examples of large and robust Custom Catalogs for Public Sector customers include:

Academic Health Center of NorthEast University = Over 2,000,000 products

NorthEast Public University = Over 2,000,000 products

6. Have you ever integrated with another ordering, financial, administrative, or vendor management system? If so, describe your experience and approach.

SHI's dedicated EDI team has worked with The State previously within the Client RFP response alongside The States IOT/IDOA EDI team to integrate a punchout system with your Peoplesoft Financial Application.

Our dedicated team of developers and engineers will work to meet any additional requirements outlined in the State of Indiana RFP.

7. Describe how you will track your compliance to each Service Level Agreement in Attachment H. Describe how the State will be able to view and monitor your compliance to each Service Level Agreement in Attachment H.

We maintain relationships with large IT Distributors, as well as smaller, local distributors, and the manufacturers directly.. We leverage our unique distribution model with these distributors to drop ship orders directly to the customers' locations. Our extensive distribution network allows for reduced time to market for our customers with distribution centers located throughout the U.S. SHI will always ship from the location with inventory closest to the customer's shipping address that has the best cost and availability for our customers. Shipments are made Monday through Friday. Next day and Saturday delivery are available for in-stock items but are subject to a shipping fee and will require that the order be received before a certain cut off time.

Most transactional orders do not have an established on-time delivery guideline against which to measure our average on-time delivery rate. Where SHI has established a Service Level Agreement (SLA) for delivery of product to a customer, we have an average success rate of 98% or higher for meeting the established SLA. We will collaborate with the State to ensure that we are able to meet your timeline for delivery.

With the exception of custom built or custom configured products, most products are delivered within 2-5 days of being ordered. Pre-configured systems are delivered to the customer on average 1.5 days from receipt of order. Custom PCs and Data Center hardware have longer lead times depending on the manufacturer and product ordered. At the time of quoting and again at order placement, the SHI sales team will inform the end user of the exact delivery timeframe.

On average, across our largest distributors, our fill rate is between 93%-100%. In most cases, where we are not filling orders on time, it is due to constrained items. In these cases, we notify the customer immediately and either source from a different distributor at the same cost to customer, continue to wait, or cancel the order based on what the customer wishes to do. SHI will also provide any substitutions available for comparable products the State would like to consider as another option.

8. Include (via a separate attachment if necessary) a short video to demonstrate the following processes:
 - a. Searching the catalog for software and filtering the results
 - b. Placing an order
 - c. Looking up a purchase history report by a specific customer, filtering the data, and downloading the report into a PDF or Excel file
 - d. Looking up license information by a specific customer, filtering the data, and downloading the report into a PDF or Excel file

See "SHI Demo" attached in " 2.4 Attachment F Technical Proposal folder"

6. Quotes, Ordering, and Fulfillment

1. Describe your proposed process and tools for quote requests, order submission, and order tracking. In your response, address the requirements in Section 1.4.9, at a minimum.

To help with the selection of product, equipment, and services (whether it be a Laptop, Desktop, All-in-One, Tablet, or other device) the SHI Team will provide you with a customized procurement website, allowing authorized end-users to select from standard configurations and peripherals, as well as providing necessary information to ensure a successful installation. The procurement website provides all service catalogs, approved hardware configurations, and inventory databases, allowing you to acquire the best products for your needs.

Regardless of the method of submission (email, fax, web), the order is routed to your dedicated Inside Sales Team for validation and the management of the order process. Upon receipt, the Inside Account Manager (IAM) will review the order to ensure it is complete and can be processed. If the order is not valid for any reason, the IAM will contact the customer within 2-4 business hours to request any necessary information. If lower pricing is available, the IAM will inform the customer and pass the lower price on. In a case where a price has increased, SHI will honor the price if the quote is within 30 days of the original quote. If the quote has expired, SHI will make a best effort to work with the manufacturer to honor the price.

Your dedicated sales team will enter all valid orders on the same day they are received. An automatic order confirmation will be generated and sent to the end user listed on the purchase order, as well as any other contacts the customer has designated. We can customize the information on the order acknowledgement email and can include any and all information required by the customer.

Once an order is entered, it is then directed to SHI's Procurement Department for processing. This team is then responsible for placing the order with the appropriate Distributor or Manufacturer. The orders are sent electronically and confirmed, and all orders are placed within 24 hours of being received. Should there be a change in the delivery time, the Procurement team will notify the sales team immediately. At that point we will reach out to the end user to discuss options.

Should a product not be available at the time of order placement, the Inside Account Manager will reach out to the contact who placed the PO and advise that contact on all the options available. No substitutions will be ordered unless we have express, written authorization to do so by the end user.

We have the flexibility to bill upfront, in arrears, or on a payment plan depending on the requirements of each purchase. We will have these discussions before the quote process takes place and confirm again before we enter the purchase order. In this way, we will alleviate incorrect billings. In the rare case that something is incorrectly billed, the customer can simply reach out to their sales team and they will work with our Accounting Department to resolve.

SHI can accommodate sending either hard copy invoices, electronic invoices, or both. Summary billing is also available. We can provide changes to their preference at any time. Invoices will be sent only after the products have

been delivered. Additionally, we would like to meet with you to understand your requirements, typical acceptance procedures, and time frames.

2. Describe your approach to delivering products and how you will comply with the delivery requirements in Section 1.4.9 in all instances except:
 - i. Item has been discontinued by software publisher or is not yet available.
 - ii. Item is out of stock or delayed by distributor or software publisher.
 - iii. Extreme weather conditions or disasters or other causes factually beyond the Respondent's control and without their fault or negligence impede the Respondent's business operations.

SHI will process the State's orders within the agreed-upon SLA. While many software publishers and distribution partners' typical turnaround for electronic license distribution is 24-48 hours, SLAs will vary by partner. SHI will work with these partners on the State's behalf to set expectations for the anticipated SLAs turnaround for your licensing standards.

7. Reporting

1. Describe how you will meet the reporting requirements listed in Section 1.4.10.

SHI creates custom fields within our order entry system to capture the data up to an unlimited number. Once the information is collected, it is readily available for reporting and inclusion on your invoices. SHI's order entry system also has the mechanisms to track our customers' maintenance purchases and expiration dates. In addition, we capture detailed information about the hardware assets that we manage within our configuration center. We can also combine the asset information with the end-user information the customer provides and generate asset tracking reports, which can be used as they are or can be loaded into your internal asset management databases.

The information that we may capture includes, but is not limited to:

- Serial Number
- Asset Tag Number
- End-User Name
- Department, cost center, etc.
- Other information as required by the State

The State also has the ability to run real time reports on SHI.com based on permissions assigned to the usernames; so only authorized users within the State will be permitted to run reports. You can run the report yourself, or a member of your Account Team will run the report for delivery directly to the requestor.

SHI provides a report request form on our web site. The user will select the report type, the date range for the report, and will enter the Email address for delivery, up to an unlimited number. Also, you will select the format in which you want for the reports, i.e., Microsoft Excel, HTML, tab-delimited text file, or fixed-width text file. Once the form is complete, our server will run the report and send the email with an attachment in the requested format. Our web-based reporting tool delivers 95% of all reports within 5 minutes.

Also, SHI supports report subscriptions. The user can request a report once for delivery at regular intervals. Most customers have a standard set of reports that are required monthly, weekly, or even daily or quarterly. The user can select the report parameters once for delivery at the chosen interval forever, or until the subscription is

removed. Typically, users select report subscriptions to run in the middle of the night so that it will be waiting in their inbox for the morning.

2. Describe all the standard reports that will be available on the account management website and data system for all Eligible Entities, and for the State Contract Manager. Provide samples of each of these reports.

SHI fully understands your need for flexibility in reporting, as well as your need for reports from the highest organizational level to the most granular. In response to those needs, we created databases that remain flexible enough to be able to incorporate any organizational structure and to provide reports on any level within the organization.

The State will be able to run real time reports on SHI.com is based on permissions assigned to the usernames; so only authorized users within the State will be permitted to run reports. You can run the report yourself, or a member of your Account Team will run the report for delivery directly to the requestor.

Sales History Reports

These standard reports provide an overview of your purchases from SHI; our system allows for tracking within Customer Specific Fields, and we are able to generate these reports in numerous ways. SHI will provide these reports in any time frame that you require, and in one of three formats: detail of all transactions, summary by part number, or summary by manufacturer name.

- Contract Invoice Detail – details the purchases by contract number.
- Manufacturer Profile – Summarizes purchases over the past 12 months by manufacturer name.
- Invoice Details – provides detailed transactions and can be run for selected manufacturers or across all manufacturers. The report can detail each transaction or summarize the spend by part number.
- Spend by Customer, by State, or for entire contract – to put the right information in the right hands, each of the above reports can be pulled based on a specific organization, State, or across the entire contract.

Reports are available on-line to those customers who have the authorization level to run reports or can be requested through your Account Team.

Sample reports attached in portal.

3. Provide a list of all existing quarterly reports and metrics that you currently produce and/or provide to other customers.

SHI provides a report request form on our web site permitting users to select the report type as well as the date range for the report. Once you select the format in which you want to receive the report (i.e., Microsoft Excel, HTML, tab-delimited text file, or fixed-width text file), our server will run the report and send the email (to the address supplied by you) with an attachment in the requested format. Our web-based reporting tool delivers 95% of all reports within 5 minutes.

Also, SHI supports report subscriptions. The user can request a report once for delivery at regular intervals. Most customers have a standard set of reports that are required monthly, weekly, or even daily or quarterly. The user can select the report parameters once for delivery at the chosen interval

forever, or until the subscription is removed. Typically, users select report subscriptions to run in the middle of the night so that it will be waiting in their inbox for the morning.

We begin with the most granular reporting level, which can be viewed by department or local government entity, and then we group the ordering units to the Statewide level. In addition, we capture contract numbers, allowing us to run a report across all purchases made under a contract. We also have the capability to collect customized data fields, which can be established at the State Level, the Agency Level, and /or per individual customer. We are pleased to offer both standard and customized reports to the State, in addition to any required reporting.

All reports can be set up on a subscription basis and will be delivered automatically daily, weekly, quarterly, or in whatever frequency you choose. In addition, the State will have a dedicated account team that will be able to review and discuss purchases and reporting whenever there is a need.

Standard fields that are available within a detailed report include:

STANDARD FIELDS AVAILABLE IN A DETAILED REPORT

CUSTOMER NAME	MANUFACTURER NAME	MANUFACTURER PART NUMBER	PRODUCT DESCRIPTION
VERSION	OPERATING SYSTEM	MEDIA	LANGUAGE
PRODUCT TYPE	LICENSE PROGRAM	LICENSE POOL	LICENSE LEVEL
LICENSE POINT VALUE	MAINTENANCE TERM	MAINTENANCE TIME REMAINING	UNSPSC NUMBER
UNSPSC SEGMENT	UNSPSC FAMILY	UNSPSC CLASS	UNSPSC COMMODITY
ORDER DATE	SHI ORDER NUMBER	INVOICE NUMBER	SHIP DATE
SHI PART NUMBER	QUANTITY	UNIT PRICE	EXTENDED PRICE
CUSTOMER PO	SHIP TO COMPANY	SHIP TO ADDRESS	SHIP TO CITY
	SHIP TO STATE	SHIP TO ZIP CODE	

4. Describe any existing dashboards for State executives to manage the Contract and software providers.

SHI has established itself as the most effective License provider to help customers track their software purchases. Our capabilities will relieve the State of the burdensome requirements of these agreements. Through SHI.COM, authorized users can view agreements managed through our EMS (Entitlement Management System). The System will display top-tier partners like Microsoft, Adobe, VMware, Symantec, Veritas, etc., and

shows level, program, and anniversary date. Customers can list specific products covered under the agreement in the form of an Excel spreadsheet or within the catalog structure of SHI.COM

Other tools available through SHI.COM to our customers to support licensing agreements include:

BI Reporting

- SHI's Software Licensing Reports can consolidate all of your license agreements, or focus on a single program. Standard reports consist of:
- Entitlements Report - Summarizes the customer's licensing agreements, anniversary dates, and end dates.
- Contract Invoice Detail—Provides a summary of your purchases per licensing program for contract milestone comparisons—by point value, quantity, or dollar value, depending upon your contract terms.
- Maintenance Renewal—Provides advance notice when maintenance purchases are expiring. This report is available in any timeframe that you request (i.e. 30 days or 60 days in advance), to provide you with enough time to budget your renewals, evaluate which renewals are necessary and which are no longer in effect, and to place the renewal order with SHI.

If the State has additional reporting requirements, SHI will develop custom reports, as we have for some of our largest customers. SHI never charges for the reports we provide, both standard and custom.

Maintenance Renewal Timeline

The timeline displays renewal events for the next 36 months. Users can view Part number, Product description, quantity, and expiration. If the product is purchased from SHI, the user will see Customer PO number, SHI Invoice number, Original Purchase date, and relevant licensing information. This tool can also display data from external sources such as customers and partners.

Fine Print

SHI developed and currently maintains an ongoing Contract Indexing tool called Fine Print. Standard license agreements maintained by SHI, are indexed and available to you at no-charge. A list of the standard agreements will be provided upon request. Custom agreements or those specific to your organization, fees do apply. The benefits of Fine Print include, but are not limited to:

- **Faster Access to Information:** With advanced indexing tools, Fine Print allows faster and more accurate access to agreement information, centered on the business questions that arise day-to-day on IT use rights.
- **Greater Leverage:** The ability to make easier comparisons across agreements by multiple publishers provides greater leverage during contract negotiations with publishers, resulting in increased savings opportunities.
- **Lower Risk:** By making contract information more accessible, Fine Print makes it easier to check how you use your products against what is permitted in your agreements, reducing the likelihood of unintentional contract violations.

8. Knowledge Development

1. Describe how you will meet the knowledge development requirements in Section 1.4.11.

For SHI to provide the highest value, we need visibility into the State's environment, processes, structure and business goals. At SHI, we understand that regular and open communication is the key to developing this value-added relationship and ensuring ongoing customer satisfaction. To facilitate this, SHI establishes a cadence of regular Quarterly Business Reviews with key representatives from both organizations. These business reviews not only focus on historical transactional performance but are designed to emphasize operational efficiency recommendations and business roadmap initiatives. Additional areas may include an Executive Overview, review of the State's spend , SLA's, major Accomplishments in area of cost savings, and setting of newly realized goals moving forward.

9. Other Value-Added Services

1. Describe how you will provide the Value-Added Services listed in Section 1.4.12. Provide details on any capabilities and tools.

SHI fully supports the State's request and is eager to assist the State with ensuring they are getting the right software at the best price. We will represent the best interests of the State and its agencies in negotiating and working with software publishers to maximize your cost savings.

Our primary priority is our partnership with our customers. To that end, we provide a vendor-neutral approach, using our experience and breadth of knowledge to assist you in finding the right technology (and technology partner) to meet your specific requirements. Our approach is centered on quality of service and overall value, providing the highest level of support and services, and delivering the products customers need to achieve their goals. Using our PRO tool and through continuing conversations with the State, the SHI account team will continually look for opportunities to provide promotions, coupons, and other savings opportunities.

It is important to note that this proposed markup is a maximum one, and there are many instances in which we can – and will – provide a greater discount. Whenever possible, we pass discounts and savings to our customers.

Our purpose is to provide the best overall value to the State, and we understand that this goal is achieved through a combination of world-class support, aggressive pricing, and extensive product and service offerings. Manufacturer Relationships go a long way in helping our customers: SHI has relationships with manufacturers to assist the State in 1) reducing its expenditures on IT hardware and software, 2) negotiating and benefitting from volume-based pricing programs, and 3) managing the lifecycle of its IT assets.

We understand that the State and its agencies want to purchase products at the lowest possible price, so we initiate a sourcing process for each transaction that ensures we begin at the lowest price possible. We base our discount structure on SHI advertised price and do not inflate the price for RFPs. In addition, we identify volume discount programs; if there is a product available at a bulk price or a formal discount program from which the State benefits, the Account Team will bring these opportunities to your attention. Finally, we maintain award-winning relationships with many distributors in order to ensure that our pricing is always competitive, allowing customers to attain value from the combined buying power of all SHI customers.

Presales Assistance

SHI takes pride in our role as an enterprise software advisor to the world's largest organizations with the most complex IT environments. Our success has been based on the resources we have allocated to software license program management, in support of both our customer relationships and our publisher relationships. Furthermore, SHI offers a wide range of tools and services designed to ease the management of license purchases and deployments. Our focus starts with ensuring that each customer is educated on all the options available and continues all the way through to the Asset Management Tools that allow our customers to manage those intangible assets throughout their organization.

The SHI Account Executives have the expertise, the public sector experience, and the internal resources necessary to evaluate a customer's existing system and application environment to provide an analysis of their licensing options. In conjunction with their dedicated Field Service Engineers (FSEs), SHI Account Executives work closely with the participating States to understand standards and future direction, with an emphasis on leveraging your existing install base, future rollouts, and competitive upgrades and maintenance. Additionally, our ESG team helps customers execute their mission by getting the right technology, to the right people, at the right time. By understanding the complete project lifecycle, ESG addresses customer business needs, helps them acquire the appropriate technology, and follows through to make sure that the technology sold to customers is adopted or consumed correctly and meets the initial business needs. These efforts, combined with realistic forecasts, assist each customer with comparing the various options available and the savings realized by executing the identified Volume License Agreement.

Our Licensing Department is staffed with manufacturer-dedicated and certified experts who are available to assist the Account Executives in recommending and supporting their customers' licensing agreements. They work closely with our software partners to understand the ins and outs of their complex volume licensing agreements, to ensure that SHI has the most up-to-date information available, and to distribute this information to SHI's sales force. SHI Licensing Representatives are responsible for reporting the customers' purchases to the manufacturer within the timeframe and format required. These representatives are available to assist the members of the SHI Account Team and SHI customers with questions regarding software Volume Licensing Agreements.

In short, SHI understands that enterprise licensing agreements can be quite complex – but these agreements also provide significant benefits in terms of cost savings and reduced administration costs. The SHI Account Team endeavors to simplify the process for our customers, while ensuring that they receive maximum benefits from the agreements.

Publisher Discounts

Upon award of the contract and throughout the term of our agreement, SHI updates the product catalog to reflect any product changes. We are committed to providing any product the customer may request and can add manufacturers, products, and services on a daily basis. Customers can search by keyword, then filter the search results by various criteria, such as:

- Contract
- Manufacturer
- Product Type
- Part Number
- Part Description
- Licensing Program
- Platform

The contents of SHI's web site and the catalog are kept up to date using data feeds from our suppliers. We make daily updates to product information, availability, and pricing; ensuring that contract users are always accessing the latest products and at the correct price.

Savings

SHI understands that our customers need to reduce costs, identify areas for savings, and ensure that they achieve the best value for their IT spend. SHI will continue to work with all of the participating States and individual contract users to identify savings not only within the State but across all participants, whenever possible.

Depending upon the participating States' needs and the flexibility of the publishers' programs, each of the cost savings opportunities mentioned above may be applied at the individual customer level, the State level, or even for all participants. SHI's detailed reporting and regular review of spending give us the visibility and information needed to work with software publishers on your behalf and create possible savings opportunities.

Marketing

SHI welcomes the opportunity to collaborate with the State and its agencies. We are confident we will sustain an exceptionally successful partnership with the State, which will begin with our immediate objectives in the event of an award, including:

To nurture our partnership with the State, supporting the contract with passion and vigor. Given our position in the Public Sector market, the size of our sales force, and our experience with implementing and growing similar

contracts, we are confident that we can extend the State's reach not only in terms of revenue achieved, but also in terms of the number of distinct members who use this contract.

To develop marketing materials and campaigns that will help disseminate the value of the State-SHI partnership. As an example, we will employ our Business Development Team, dedicated to the Public Sector Business Unit at SHI, to call all prospective customers and detail our partnership promptly upon award.

To train our entire Public Sector sales and sales-support staff about the State and its members. This training will include contract terms and methodology, pricing parameters, and the value that the State provides to its Members.

To connect immediately with current State Members, introduce SHI, and listen to Members' needs. Our introduction will ensure that each Member's dedicated Account Team is familiar with and accessible to them, in addition to educating Members on the value we provide. We will work with each Member to understand their business preferences (specific information on a quote, reporting requirements, invoicing/billing requirements, and the like). And we will offer webinars on various topics including:

- Getting to know SHI;
- SHI.com (eProcurement intro);
- SHI's Service Capabilities;
- Microsoft Volume Licensing.

As an example, this is what our marketing plan typically looks like but we'll work with the State to tailor this plan to the specific needs of its agencies and local entities.

First week:

- Create a co-branded press release and work quickly to distribute to agreed-upon trade publications;
- Post announcement along with contract details and contact information to www.shi.com;
- Begin design of co-branded marketing materials including print, electronic, email, and presentations;
- Engage Government and Education Affairs team to discuss educational initiatives and technology trends;
- Discuss publication and distribution plans, as well as a plan to distribute and follow up on leads;
- Create social media strategy;

First month:

- Complete design of co-branded marketing materials;
- Finalize plans to publish and distribute;
- Begin distribution to current and prospective agencies and local entities
- Implement initial social media strategy.

First ninety days:

- Post announcement as a blog post to our widely read blog.shi.com series;
- Complete training and enablement for SHI account teams;
- Complete publishing and distribution of initial marketing materials;
- Analyze initial activity;
- Discuss next ninety-day plan for marketing.

Ongoing:

Design and publish national and regional publication in trade journals and on social media;

Market and promote the Master Agreement including case studies, presentations, campaigns, and blog posts.

In addition, SHI participates in hundreds of trade shows, conferences, and meetings across the country – virtually when needed. We also provide seminars and workshops to our public-sector customers across the country and are eager to do so for the State. In all cases, we will work with you to determine the right topics, venue, timing, and participants.

Participation in annual audit of pricing

SHI will comply with any State audit requirements agreed upon in the executed master agreement upon award.

Publisher-Hosted Information Sessions

For technology to be effective, it needs to function properly and consistently. For that reason, SHI has increased our focus attention over the last few years to building solutions to solve customers' specific technology needs. Working from our customer-centered foundation, we developed a broad team of experts to facilitate solution-based, support services. Our expert Solution Consultants are vendor-neutral and draw upon a range of experiences to help tailor conversations that are provide unique benefits for the State specific environment. We engage our customers during the strategy and solution-design phases of a project and assist with deliberate planning, assessments, whiteboarding, proof of concepts, and obtaining demo units.

Our Customer Innovation Center (CIC) allows customers to test and compare IT Solutions before committing to an investment. The CIC is staffed with trained team members and technical professionals who are experts on both products and solutions. As technology advances and changes, the available technologies in the SHI CIC will follow, ensuring that we always have the products and relevant technologies that our customers are interested in evaluating.

In addition to evaluating technology through the CIC, committed to acting as your trusted IT advisor, SHI encourages the State to participate in technical briefings. Through these one-hour sessions, SHI will connect our technology experts with the State stakeholders to provide an in-depth overview of a specific technology or trend and help your organization design solutions to attain your goals as an organization. OEMs and related publishers are invited to these sessions as needed.

Current briefings sessions include:

- Cloud Native Desktops
- Cloud Security & Compliance
- Cloud Spend Optimization
- Establish a Cloud Center of Excellence (CCOE)
- Identity & Access Management
- Introduction to Containers, Container orchestration platforms, Container ecosystem
- IT Consumption Models
- Zero Touch Deployments
- Microsoft Teams Adoption
- Network Transformation

1. Describe any other relevant value-added services available.

Comprised of over 80+ subject matter experts globally, the ITAM team at SHI has been assisting clients with all their IT Asset Management needs for the past 10 years. Our SMEs include former auditors themselves from publishers such as Microsoft, Oracle, IBM, etc. and/or audit firms such as KPMG, Deloitte, PWC and many others. Several of our senior consultants have served on the ISO standards advisory board and still have an active role in the creation and update of the industry standard ISO 19770-1.

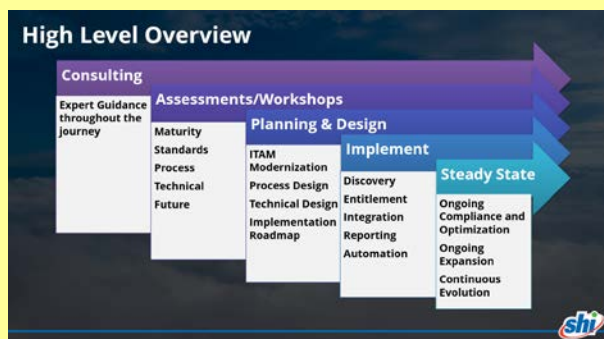
The ITAM team's sole purpose is to help our clients save money through better management of their IT assets, risk mitigation, cost avoidance, regulatory compliance, and technology planning. The IT Asset Management services we deliver are strictly tool, vendor, publisher, and source agnostic; we are independent and impartial, and our only goal is to meet the needs of our clients in the most advantageous, least costly way possible. We are extremely proud of the service we have provided to our clients over the years and equally so of the broad, expansive team of industry expertise we have assembled.

We assist hundreds of clients every year with a wide range of IT Asset Management services from compliance and optimization analysis to audit defence to ongoing managed services to what could be considered the most important Process review and implementation. The ITAM team at SHI works with clients of every size, industry vertical and configuration in both the public and private sectors. We are well versed not just in ITAM compliance methodologies and standards but also with the wide range of regulatory compliance structures our clients must adhere to. SHI has a proven track record of delivering full, complete, actionable, and maintainable results to our clients and we are confident we have the right combination of experience, expertise, and technology to execute the requirements set forth in this RFP at the highest level of excellence.

ITAM End-to-End

We have a very broad range of potential offerings and, in our experience, the architecture and management of an asset management practice evolves significantly from the RFP stage through to the actual implementation. As such, our response to this RFP contains several options across the various stages of program implementation. In this response we will cover the types of offerings we can provide as well as our recommended approach given our current understanding of your environment from the primary RFP document as well as completed Q&A.

SHI advises a phased implementation of the IT Asset Management practice that combines ongoing guidance and consulting, ITAM Maturity Assessment Workshop and Planning Phase followed by Implementation and ongoing management in steady State.



Each Phase of the project puts the objectives and practices from the previous phase into production while generating the requirements and actions for the next phase. SHI has a very wide set of services and support we can provide; the State can select the areas SHI should execute as well as own the areas you would prefer to perform in-house. This ensures SHI is delivering customized support in the areas that are of greatest value to the State. This approach is intentionally

somewhat open-ended to allow for flexibility as the project evolves; we want to ensure that the solution is tailored to your business needs rather than tailored to a specific vendor technology or limitation.

- SHI's High Level Suggested Solution Roadmap:
- Consulting
- ITAM Consultants to help guide the project from beginning to end
- Assessments/Workshops
- ITAM Maturity Assessment (ISO 19770)
- Determines Current and Future State of ITAM practice
- Establishes the High-Level Steps in each practice area needed to reach desired maturity
- Planning & Design
- ITAM Planning & Design Workshop (based on Maturity Assessment)
- Determines *specific* ITAM Goals
- Project Phases
- Strategic Publishers and initial Onboarding
- ITAM Platform
- ITAM Discovery Strategy and tools
- Product Recognition and Normalization Strategy
- Additional systems integration
- Steady State Management Plan
- Handoff and Training Programs
- Workflow and automation
- Determines Solution Architecture
- Determines rollout roadmap, milestones, KPIs
- Implementation (Based on Planning & Design Workshop)
- Implementation of ITAM Solution
- Implementation of Discovery
- Implementation of Recognition and Normalization Strategy
- Onboarding of Phase One Publisher Entitlements
- Initial Compliance and Optimization Analysis and Validation
- Implementation of workflows and automation
- Steady State
- Operation of Solution for Initial phases
- Training of customer Personnel
- Graduated handoff of operational duties
- (Optional – Ongoing Managed Services)

SHI Asset Management Solutions

The Asset Management Technology Solution is comprised of four primary components: The ITAM Platform, Discovery, Reporting, and the ITAM Team of SMEs at SHI. Each of the components have a range of options and are highly customizable to suit your specific needs. We can offer these services both as a hosted cloud based offering or on-premise implementations*.



ITAM Platform

ServiceNow-Based ITAM

Whether leveraging/expanding an existing ServiceNow implementation or implementing a new one, the ITAM team at SHI can provide assessment, road-mapping, design, implementation, automation and, if needed, direct operation of the SAM functions of ServiceNow with a particular focus on the SAMPro module. SHI has a full team of Asset Management experts who can help you with all phases of implementing Software and Hardware Asset Management in the ServiceNow Platform. Service now implementations can be done via the cloud or on-site.

Etelligent ITAM Platform

A Hosted, SaaS Asset Management Platform, Etelligent leverages an extensive rules-based compliance engine to optimize license allocation. It is designed to allocate the most cost-effective license to each deployment and executes daily to dynamically reallocate licenses as changes occur to the customer environment. This includes automatic license harvesting and reallocation, the ability to handle contract/BU constraints, leveraging of downgrade/cross-family equivalency, and much more. *Etelligent is available only as a cloud based, hosted offering and cannot be implemented on-premise.

Inventory Discovery

JDisc Discovery

JDisc is a zero footprint, automatable, multiplatform discovery tool that SHI uses as a primary data collection source. JDisc is capable of doing in a single easily to implement tool what used to require data from multiple tools, scripts and systems. It is compatible with every major OS Platform and Hypervisor in use today and can collect extremely detailed hardware, software and configuration data. It can collect data from nearly any network connected device, going well beyond just servers and end user compute devices to networking gear, IP telephony hardware, printers, IOT devices and more. It also has advanced features like Network Topographical and Dependency Mapping, Security Access Reviews,

Perfmon data to monitor the use of system resources such as CPU, memory and disk usage as well as Device History Tracking.

Platform-Based Discovery

For customers leveraging ServiceNow SHI can assist in the planning, configuration, deployment and management of the discovery agents and/or scanning functions of these platforms to ensure a full, complete and accurate data stream is being leveraged for your Asset Management analysis.

Hybrid Discovery

Ultimately, many customers leveraging ServiceNow find that a blend of the platform discovery tools, and other techniques best meets the specific needs of their environment, so a hybrid approach is of course available.

O365 Subscription Discovery

SHI has a unique, internally developed O365 Management Solution that leverages the Microsoft Graph API. This discovery technique involves a direct, API based connection to your O365 tenant to extract the data already collected by Microsoft. This data is then analyzed through both Rules and AI based methodologies to provide incredibly detailed visibility into usage of O and M products across your workforce. This analysis will also identify opportunities to reduce spend through more efficient management of disabled, idle and unused subscriptions and more closely tiering subscriptions to each user's work habits.

SaaS Discovery

SHI utilizes a variety of SaaS discovery tools to consolidate data from a wide variety of SaaS providers to help consolidate, reduce spend, identify risky permissions and manage the other complexities of SaaS Based Products.

Dashboards & Reporting

ITAM Data Insights

Our ITAM Data Insights portal is a sophisticated BI reporting portal allowing 24x7 access ITAM Dashboards, reports and overall data. We have an extensive set of predesigned dashboards and can quickly create customized dashboards to suit any need a customer may have. Data Insights dashboards can be designed and created for any of the SHI supported ITAM platforms.

Platform-Based Reporting

For customers leveraging ServiceNow SHI can assist in the planning, configuration, deployment and management of built-in reporting functionality in ServiceNow.

Hybrid, Multiplatform Reporting

Some customers leveraging ServiceNow find that the Platform Based Reporting is suitable for some use cases and Data Insights is best suited for others, so you are welcome to leverage both solutions.

The ITAM Team at SHI

The ITAM team at SHI is a team of 80+ asset management SMEs, many of whom are former auditors themselves. We have a full research team dedicated to staying current on changes to products and licensing programs. Our team is typically aware of upcoming changes well before those changes have been publicly released.

In addition to the specific resources allocated to the project, managed services customers can benefit from the full range of expertise across the entire ITAM Team; we are here to support our customers in all their IT Asset Management endeavors.

The ITAM team at SHI work with our customers on a regular basis not just to ensure proper compliance coverage but also to explore further savings opportunities through changes to licensing programs, deployment methodologies, virtualization and cloud optimization and so on.

SHI will work with Customer to review and evaluate existing licensing agreements and build a plan to optimize those agreements going forward. We can assist in contract negotiations to include the most favorable terms possible

The ITAM team can provide advice and sign off assistance, in conjunction with our managed services we maintain a current status on all allocate/surplus licenses to allow procurement to review what existing, unallocated license are available for reallocation before making a net new licensing purchase. SHI has several mechanisms for capturing software purchase transactions and our goal is to automate as much of that capture process as possible.

The ITAM team has extensive experience with heavily regulated, highly secure environments and complex regulatory oversight scenarios. From HIPAA to DFARs to SEC to SOX, from GDPR to CCPA and everything in between – our experts have worked with and understand the needs, concerns and mechanisms of the wide and varied frameworks our customers work within. This means we understand how your business, IT, finance and security processes need to work and we will work to create solutions with you that meet all your objectives in a holistic, strategically sound way.

Managed Services

Regardless of the ITAM Platform chosen, the Managed Service is an automated, continuous compliance and optimization service which includes hardware and software asset management, license usage optimization, process and policy best practices guidance, audit risk mitigation and much more. Data from a wide range of sources is collected, aggregated, processed and presented in a single place. Data collection is automated across the environment, allowing our advanced, rules-based compliance and optimization engine to continually look for the least costly, most efficient way to license the environment. As the environment changes the usage of license entitlements will change as well.

Our Managed Services are extremely customizable both in features and service levels. From Fully Managed SHI-outsourced programs to primarily customer-operated scenarios where SHI supports the underlying technologies and feature development and everything in between, we can tailor our ITAM services to suit nearly any customer need. Furthermore, our Managed Services are designed from the ground up to be flexible so our services can grow, evolve and change as the State's business goals and the ways they leverage technology changes.

Compliance and Optimization – Optimized License Position

An Optimized License Position (OLP) is a one-time assessment of a publisher or publishers that identifies trends in your current licensing, surplus license opportunities, and licensing deficiencies to be reconciled. With the baseline, you can make informed decisions regarding license contracts, maintenance renewals, and software procurement for cost savings, reduced risk, and recycled software assets. SHI executes over 350 OLP engagements a year assisting customers in preparing for true ups, renewals, mergers/acquisitions/divestitures and so on.

Audit Defense

SHI has full, rapid-response Audit Defense team - comprised of former auditors - to assist customers in any audit situation. Our Audit Defense practice is focused on providing direct the expertise and experience necessary to regain control of the audit process, regulate what visibility the auditor ultimately is granted, discrediting inaccurate auditor and analysis and negotiating the most beneficial settlement and contract terms and conditions. This service has resulted in an average settlement of 10% of the Publisher or Auditor's findings. Audit defense assistance is included in our managed services for in-scope, managed products.

SaaS Management Services

SHI leverages several different SaaS management tools to meet the needs of our very wide base of clients. Combined with other techniques as needed, SHI can provide tools and services to enable customers identify both known as well as previously unknown SaaS usage, reduce costs, consolidate SaaS Spend and mitigate security risks inherent in SaaS usage.

O365 Subscription Management Services

SHI has a three – tiered offering related to managing Microsoft O365 and M software subscriptions. With the overall goal of reducing spend and ensuring data security, SHI uses APIs to tie directly into the Azure/O365 Tenant(s) to create extremely detailed analysis of usage and optimization opportunities.

- **Standard:** A value add offering that provides a broad and detailed review of spend, services adoption, security risks and cost reduction opportunities; this service provides specific user-by-user recommendations for releasing, deprovisioning and re-tiering of license subscriptions you can use as a clear guide to self-manage the VLSC and O365 portals.
- **Professional:** A fee-based subscription that includes everything in the Standard tier with even greater depth; this service includes regular score carding, consulting with SHI Subject Matter Expert's to develop an overall management strategy, ongoing advice and assistance.
- **Professional +:** For customers who would rather free themselves of the burden of managing O365 subscriptions altogether, this tier of service automates the recommendations and automatically provisions, de-provisions and re-tiers O365 subscriptions continually throughout the year. This is preceded by a scoping workshop to determine the customer's thresholds, triggers, approved changes, VIPs, time frames and other conditions relevant to automating subscription management.

Workshops and Assessments

We provide a varied set of customer workshops and assessments, from ISO 19770-Based ITAM Maturity Assessments to Cloud Readiness reviews to ITAM ROI Value Workshops. An ITAM Maturity Assessment is included at no additional charge in all our Managed Services.

SHI Software Asset Management (SAM) Planning Workshop

The SHI Software Asset Management (SAM) Planning Workshop is a compact, disciplined process that ensures the right software entitlements, measures, and collection processes are in place for a successful SAM program. The Workshop brings together all the personnel, skills, and experience needed to coordinate and plan the complex process of gathering information for asset and compliance management. As it happens, the exact same process is required to be prepared for a software license audit. The Workshop ensures that you have addressed all the software audit risk areas and are prepared to deflect audit threats and defend against audit claims without the typical (and expensive) audit "fire drill".

SHI's SAM Workshop describes all of the infrastructure and processes necessary for the effective management, control, and protection of software assets throughout all stages of their lifecycle. The strategic goals of SAM include (but are not limited to) the following:

- Control cost and business risk for a stronger financial position
- Optimize existing software investments to enable you to do more with what you have.
- Help your organization become more agile by making better use of resources, even in changing business conditions.

Renewals Management Services

SHI understands it can be a challenge for organizations to proactively track all expiring IT maintenance and support agreements. With inconsistent renewal dates across manufacturers and/or products, organizations may rely on the publishers and manufacturers to provide renewal notification. The SHI Renewal Organizer is a more reliable solution. Available at no charge to our customers, the renewal organizer compiles your technology renewals in a centralized, rolling three-year on-line timeline for simplified budgeting and renewal management. This service is available stand-alone or with our other ITAM services.

2. Describe how you will provide high-quality presales assistance (e.g., cost-effective buying strategies for software product with a complex VLA).

SHI is not always the only source for a particular software title. However, we do possess a unique advantage in the industry. Our knowledgeable team members, long history with public sector customers, and top-level Publisher relationships allow us to understand how to leverage our customers' cumulative purchase history and volume to manage the Software Contracts and consolidate the spend and identify areas for cost savings.

SHI understands that our customers need to reduce costs, identify areas for savings, and ensure that they achieve the best value for their IT spend. SHI will continue to work with all of the participating States and individual contract users to identify savings not only within each State but across all contract participants, whenever possible.

Depending upon the participating States' needs and the flexibility of the publishers' programs, each of the cost savings opportunities mentioned above may be applied at the individual customer level, the State level, or even for all contract participants. SHI's detailed reporting and regular review of spending give us the visibility and information needed to work with software publishers on your behalf and create possible savings opportunities.

- Licensing—Whenever possible, the SHI Account Team provides quotes for licenses rather than shrink-wrap software; licensing options can offer tremendous savings over shrink-wrap. Even within licensing programs, there are often additional nuances to consider. For example:
- Transactional Licensing Programs — These types of licensing programs can offer significant savings to customers who purchase in large quantities but who cannot make a contractual commitment or forecast buying estimates. These license programs usually require a first-time buy-in (sometimes as few as 1-5 licenses will qualify), which sets the discount level. The terms and conditions will vary by publisher. Still, whenever a purchase is eligible for these discounts, the SHI Inside Account Managers will provide the information to the customer at the time of quote. The SHI Account Executives will also identify these opportunities during meetings with each participating State to provide additional visibility to savings opportunities.
- Contractual Licensing Programs—SHI Account Executives regularly make recommendations for contractual licensing programs after reviewing each customer's and each State's purchase history. These opportunities cannot usually be identified based on single quotes; instead, the AE uses SHI's comprehensive purchase history reports to monitor each customer's purchases over time. The SHI AE reviews one-off purchases to identify opportunities for new Volume License Agreements and reviews all purchases under existing agreements and makes recommendations for when a customer should be negotiating for higher discount levels and better terms.
- Discount for shrink-wrap—If a particular customer has purchased and will purchase a single product in large volume, but the software publisher does not offer a licensing program, that customer still may be able to receive a better discount. In these cases, SHI Account Executives work with the publisher and the contract user to forecast volumes and to negotiate pricing on those forecasts. The publisher may allow for

special pricing for purchases over time, in which case SHI creates a SKU within our order entry system that can only be used by that contract user, reflecting the additional discount. In another scenario, the publisher may require a one-time volume buy-in. In this case, SHI can hold the inventory in our warehouse and ship it on an as-need basis to the customer site. Again, these products are inventoried under a State-specific SKU so that no other customer can purchase that inventory.

- One-off Price Discounts—SHI is experienced at negotiating one-off price discounts based on volume on a case-by-case basis. When your SHI sales team receives an inquiry for a large number of products, the Team will make every effort to negotiate an additional discount with the software publisher. SHI will then pass this extra discount through to the State.

3. Please describe any current marketing initiatives your company is undertaking/has undertaken with other clients. Please provide examples.

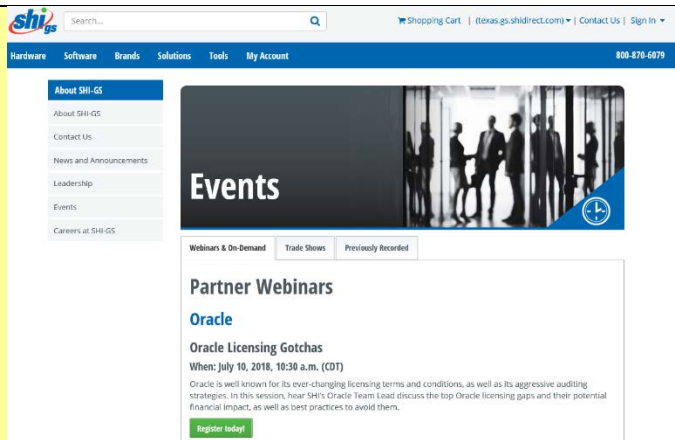
We understand the importance of marketing contracts and reaching all eligible customers. We have tremendous experience supporting customers' needs, and we understand the unique requirements of procurement organizations. SHI Account Executives will share their experience and knowledge with Contract customers, ensuring they have the information, resources, and products they need.

Upon award of contract, we will create a special edition newsletter for distribution to all existing relevant contacts, introducing the new contract for SHI as a select vendor for Technology Hardware, Software, and Services and introducing the members of our Account Team. The newsletter will also contain specific information regarding the manufacturers and products available under the contract, as well as information on how to obtain quotes and any other needed assistance. We will send this newsletter to our existing contact list and will also work closely with publisher and manufacturer representatives to market the benefits of using the contract.

In addition, the SHI Account Team uses a variety of methods to market and sell the products that we represent, including customer meetings, vendor presentations, trade shows, web seminars, printed marketing materials, our website, and a monthly electronic newsletter. We also host strategic events with many of the SHI and Manufacturer Representatives to provide our mutual customers with new product information, product changes, and industry direction. Additionally, we participate in vendor exhibits at numerous monthly events, including technology trade shows.

Some of the marketing-related items that contract customers can expect to continue receiving and accessing include:

Web Seminar Presentations – SHI hosts a series of web seminars covering a variety of topics including new product announcements, changes to licensing programs for major software OEMs, procurement and technology trends, and foundational IT information. Webinar schedules are published quarterly, and historically, our webinars have a regular audience of State of Texas public sector customers. Please check the events page on our web site <https://texas.gs.shidirect.com/> for the most current schedule.



Marketing Documents – SHI creates hundreds of marketing texts for our major manufacturer partners and SHI core services offerings, all of which are made available to customers through in-person meetings, trade shows, email delivery, and mail-outs. Marketing documents will include those that we receive from the manufacturers, those that SHI creates for a general audience, and those that SHI creates specific to State of Texas Public Sector customers. Samples of SHI marketing handouts are included as appendices to this document.

SHI Blog – SHI’s blog showcases short news and informational articles to keep our customers up to date on our services and support as well as on emerging trends in technology. Customers can subscribe to our blog online here: <https://blog.shi.com/>. The screenshots below exemplify the easy navigation of the SHI Blog website. Customers can browse by IT category, recent articles or popular posts.



Social Media – *In addition to the SHI Blog, SHI utilizes social media applications to keep our customers informed. Customers can get up-to-date information on demand by following SHI on Twitter, LinkedIn, Facebook and YouTube.*

4. Please describe your plan to market and promote usage of this Contract to Eligible Entities, including the level of effort for both the State and the Respondent.

SHI understands that promotion of the Master Agreement will be an important element of this contract's successful implementation. As a primary contractor on NASPO ValuePoint's Software VAR and Cloud Solutions contracts, SHI plans to build on prior experience to make this contract successful for the State and participating entities across the country.

SHI can employ a variety of potential marketing strategies to promote the Master Agreement and ensure maximum awareness and participation:

Social media SHI has an active presence on Twitter, LinkedIn, Facebook, and Instagram. We closely follow industry trendsetters and advertise new services and articles as they relate to our customers.

Targeted email blasts and phone campaigns to our customers, informing them about new contracts.

Internal announcements to our public sector sales force via our regularly scheduled roundtable calls and newsletters.

Webinar trainings and live presentations at our headquarters to familiarize our sales teams with new offerings.

Co-sponsored regional IT events, roadshows, webcasts and customer-facing conventions spearheaded by local SHI Account Executives to educate customers on the wealth of SHI resources available to them in support of this contract.

Trade shows/conferences SHI attends many of the top trade shows in the industry, and we highlight key resources available to us including public sector contracts.

SHI Blog Our subject matter experts, sales representatives, and partners contribute stories regularly to our customer-facing blog, informing them on insights, trends, and challenges impacting the IT industry today. We measure each post's impact through best of breed SEO and web analytics practices.

SHI.com We have dedicated contract pages on our public-facing website highlighting key contract vehicles.

10. Implementation

In this section, discuss your company's project management approach and methodology to be followed to implement the new contract, including tasks and timeline.

1. Confirm that at the request of the State, you will assume administration responsibilities for any existing license agreements for the State

SHI confirms that at the request of the State, we will assume administration responsibilities for any existing license agreements for the State.

2. Describe how you will establish agreements with the State's current publishers or otherwise arrange for the Eligible Entities to continue to obtain software. Any tasks which the State is expected to undertake should be detailed. It is desirable that the State's

involvement be limited to designating a different reseller (if necessary) for Volume License Agreements.

Upon award of this contract, SHI will provide training to educate contract users on the new agreement, including training on any new or updated requirements. SHI's Account Executive will meet with the State Procurement Office and/or Administration Office to set the timeline for implementation of the new contract and discuss specific procurement and policy initiatives designed by the State. Some examples may include topics such as: Centralized Procurement Policies and Dollar Values, State Specific Software Volume Licensing Agreements, Volume Licensing Key Codes, Enterprise Level Agreement and Bulk Purchases, Authorization Processes, Contract Document Signatories and Processes, Website Review and Discussion, Communication of SHI and the SHI Account Team, State IT Events and Tech Days. SHI's Account Executive(s) will also work directly with each State to ensure the completion of the updated website and verify document procedures and policies for the SHI Inside Sales Team. SHI's Account Executive will also meet with State Agencies, Cities, Counties and Municipalities to better understand their goals and objectives, purchasing policies, agreements established at the local level, volume licensing management and key code/order confirmation distribution policies. Of course, these will not just be one-time conversations, but rather ongoing communications.

SHI regularly reviews all of the States' Software Volume Licensing Programs to ensure that they are all up to date, and to provide any necessary paperwork and/or procedures for transitioning any Volume Licensing Programs which will be new to SHI. The SHI Account Executives also hold meetings with the Software Publisher Representatives for each State to discuss the State's current and future business initiatives. SHI understands the importance of the relationship between the State, Publisher and Reseller, and we believe that open communication among all three parties is the best strategy to meet the needs of each State. Upon award of this contract, SHI will continue to provide these services and will schedule meetings with key Publishers and the State to discuss purchase history, program changes, and any current or upcoming promotions.

When SHI is involved in setting up a new Volume Licensing Agreement for any State, whether it is at the outset of a SVAR contract or anytime during the contract term, we perform extensive analyses to assist the State in understanding the different Volume Licensing Agreements available and the cost savings between the various Publisher Agreements. SHI invests resources in educating the State on the various Software Volume Licensing Agreements, and then assisting the State with any Publisher paperwork necessary to implement the Agreements. Our Software Licensing Team is fully engaged with the Account Executive and the State Procurement Officer and Contract Administrator to ensure a smooth process with their Licensing Agreements and assist with the following:

- Contract negotiation and support
- Program requirements and review
- Impact/cost analysis
- Price validation
- Best-practice recommendations
- Organization-wide training, education, reporting and milestone tracking
- Performance metrics and customized reporting
- Organization-wide standardization of contract compliance
- Expiration Tracking and renewals notification
- Maintenance, Subscription and Support
- License Confirmations and proof-of-purchase documents

- Cost-Savings, cost-avoidance analysis
- Allocation and tracking of pre-paid software license agreements
- Electronic Software Distribution
- Media duplication and distribution

3. Describe how Volume License Agreements will be transitioned, including Microsoft, which requires a 30-day notice for the transition.

When SHI is involved in setting up a new Volume Licensing Agreement or Enrollment for any type of customer, whether it is at the outset of an established contract or anytime during the contract term, we perform extensive analyses to assist the State in understanding the different Volume Licensing Agreements available and the cost savings between the various Publisher Agreement types. SHI invests resources in educating each customer on the various Software Volume Licensing Agreements, and then assisting with any Publisher paperwork necessary to implement the Agreements.

We help contract users to navigate through those processes for any paperwork or signatures that the publishers require of the customers. In addition, we expect that publishers have varying policies for SHI and for contract users. Some publishers have additional terms and conditions that require review, and some even have their own agreement that requires customer signatures. Typically, our Contracts Specialists review the required terms and complete any necessary paperwork.

Our Software Licensing Team is fully engaged with the Account Executive and the State to ensure a smooth process with their Licensing Agreements and assist with:

- Contract negotiation and support
- Program requirements and review
- Price validation
- Best practice recommendations
- Organization-wide training and education
- Performance metrics and customized reporting
- Organization-wide standardization of contract compliance
- Expiration tracking and renewals notification
- Maintenance, subscription, and support
- License confirmations and proof-of-purchase documents
- Cost-savings, cost-avoidance analysis
- Allocation and tracking of pre-paid software license agreements
- Electronic software distribution
- Media duplication and distribution

The following are general steps that we take currently for renewal and for new enrollments, and we welcome any initiatives that would serve to improve your team's experience.

New Enrollments:

Request to schedule a call with the State and key decision makers such as IT Director;

Host the call with customer and SHI account team, SHI Licensing Executive, and publisher unique Account Manager to discuss current environment and goals;

- Define current licensing assets and requirements.
- Identify agreement/enrollment opportunities.
- Send server workbook to the State.
- Create paperwork for the Enrollment.
- Order Process Flow: A complete review of required order flow processes, ensuring any modifications to standard processes to meet the unique requirements of _____ are documented and communicated.
- Training on Value-Added Tools: Training to utilize tools such as order status tracking, License Management System, etc.
- The Account Team and SHI's Catalog Team work together to add the products to the CUSTOMER NAME customized on-line product catalog.

Renewals:

- Send quote 3 months in advance of the renewal;
- Schedule a call with SHI account team, SHI Licensing Executive, and specialized team members, such as Microsoft Account Manager, once the quote has sent;
- Send the server workbook to the State
- Host the call to discuss current environment and any changes over the past year;
- Discuss unique publisher programs such as M365 and the differences from the previous FTE model enrollment;
- Send updated quote;
- Supply new paperwork, if needed.

4. Describe how you might accept reports and data about order history and asset tracking and incorporate that data into an on-line order history and asset control, given that the orders and associated data in question did not originate with you.

SHI's order entry system is fully customizable to meet individual requirements of each of our customers for custom data collection and reporting. SHI will create the custom fields within our order entry system, in order to capture the data. Once the information is collected, it is readily available for reporting and for inclusion on your invoices.

5. Describe roll out planning procedures; include methodology used to disseminate information.

Success can be measured both quantitatively and qualitatively, and at SHI we embrace both methods. We measure the success of our professional services practice based on customer satisfaction and overall project cost-recovery. Our commitment as a company is to develop long-term relationships with our customers, and as such, SHI puts a strong focus on doing what is right for the customer first and foremost. This customer-focus is reflected in the comments SHI receives from customers as well as the long-term, deeply engrained relationship our sales team has with our customers.

To ensure an exceptional customer experience, the SHI project manager holds regularly scheduled status calls with the customer throughout the project, allowing the SHI project team to address any issues or concerns before they affect the customer's overall experience with SHI.

At the end of each professional services engagement, the SHI project manager, along with the sales team's Account Executive, meet with the customer and discuss both successes and improvements needed.

In the rare case that an issue is identified during the project or at the end, the SHI project manager and sales team will work with the SHI executive team sponsoring the project to ensure a mutually agreeable remediation plan is put in place to address the customer's feedback.

6. Describe the approach to marketing and training. Include sample materials used.

With our extensive experience administering Software Value Added Reseller contracts of this exact nature, we are confident that we will exceed the requirements of this request. In fact, SHI appreciates the opportunity to work with the State and we have taken pride in our ability to administer the agreement to the maximum benefit of the contract users.

We understand the intricacies of implementing and maintaining a software contract, advocating for multiple agencies and municipalities. When we enter into an agreement of this magnitude, we take great care to implement support and service plans to meet the needs of each contract user.

Following are some of the steps that SHI takes to ensure the success of our current agreement and to maximize the value to all contract users. We will continue with these services for the term of the new contract and will continue to engage all customers to identify areas where we can increase the value we provide.

Account Management and Training—SHI has already identified the members of the Account Teams who support the State including Account Executives, Inside Account Executives, and Inside Account Managers. These teams meet regularly to discuss the contract, to ensure everyone understands the terms and conditions, and to discuss areas in which SHI is offering, or can offer, additional services in support of the State. Furthermore, SHI's Account Executives regularly meet with individual entities to discuss their purchase history and Volume Licensing Agreements. We have established a Customer Business Review which is designed to inform agencies about their purchasing history and identify opportunities for consolidation or more efficient use of pricing agreements.

Upon award of this contract, SHI will provide training to educate contract users on the new agreement, including training on any individual customer requirements. SHI's Account Executive will meet with the State stakeholders to set the timeline for implementation of the new contract, and discuss specific procurement and policy initiatives designed by the State. Some examples may include topics such as: Centralized Procurement Policies and Dollar Values, State Specific Software Volume Licensing Agreements, Volume Licensing Key Codes, Enterprise Level Agreement and Bulk Purchases, Authorization Processes, Contract Document Signatories and Processes, Website Review and Discussion, Communication of SHI and the SHI Account Team, State IT Events and Tech Days. SHI's Account Executive(s) will also work directly with the State to ensure the completion of the updated website, and verify document procedures and policies for the SHI Inside Sales Team. SHI's Account Executive will also meet with all users of the contract such as State Agencies, Cities, Counties and Municipalities to better understand their goals and objectives, purchasing policies, agreements established at the local level, volume licensing management and key code/order confirmation distribution policies. Of course, these will not just be one-time conversations, but rather ongoing communications.

Licensing Programs—SHI regularly reviews all Software Volume Licensing Programs to ensure that they are all up to date, and to provide any necessary paperwork and/or procedures for transitioning any Volume Licensing

Programs which will be new to SHI. The SHI Account Executives also hold meetings with the Software Publisher Representatives for each State to discuss the State's current and future business initiatives. SHI understands the importance of the relationship between the State, Publisher and Reseller, and we believe that open communication among all three parties is the best strategy to meet the needs of each State. Upon award of this contract, SHI will continue to provide these services and will schedule meetings with key Publishers and each State to discuss purchase history, program changes, and any current or upcoming promotions.

When SHI is involved in setting up a new Volume Licensing Agreement for any type of customer, whether it is at the outset of an established contract or anytime during the contract term, we perform extensive analyses to assist the State in understanding the different Volume Licensing available and the cost savings between the various Publisher Agreements. SHI invests resources in educating each customer on the various Software Volume Licensing Agreements, and then assisting with any Publisher paperwork necessary to implement the Agreements. Our Software Licensing Team is fully engaged with the Account Executive and the State to ensure a smooth process with their Licensing Agreements and assist with the following:

Contract negotiation and support	Program requirements and review
Price validation	Best-practice recommendations
Organization-wide training and education	Performance metrics and customized reporting
Organization-wide standardization of contract compliance	Expiration tracking and renewals notification
Maintenance, subscription and support	License confirmations and proof-of-purchase documents
Cost-savings, cost-avoidance analysis	Allocation and tracking of pre-paid software license agreements
Electronic software distribution	Media duplication and distribution

Working with Current and New Vendors — We add vendors and products to our databases every day. Our flexibility, breadth of offering, and willingness to evolve along with our customers' changing needs are unique strengths that SHI happily leverages for our customers. Upon award of the new contract, SHI will collaborate with each named publisher to ensure a smooth transition to the new contract. Additionally, we will reach out to new vendors to identify opportunities and initiatives on behalf of the State.

We help contract users to navigate through those processes for any paperwork or signatures that the publishers require of the customers. In addition, we expect that publishers have varying policies for SHI and for contract users. Some publishers have additional terms and conditions that require review, and some even have their own agreement that requires customer signatures. Typically, our Contracts Specialists review the required terms and complete any necessary paperwork. The Account Team and SHI's Catalog Team work together to add the products to the State's customized on-line product catalog.

Web Site—SHI will update the custom product catalog according to the contracted pricing and the contract requirements for product inclusion. SHI also offers training sessions and advertises the available training sessions to contract users.

Introductions and Marketing—SHI has a marketing plan for the contract to ensure maximum participation. The contract renewal is a good time to review the plan to make changes and improvements as needed. We will work with the State on appropriate timing, and appropriate venues for any face-to-face marketing initiatives. SHI's implementation/transition plan for the new contract provides for a smooth and seamless experience for the State . We will continue to put an emphasis on educating all potential users about the advantages of the contract and facilitating any necessary steps to using the contract. We understand that continued growth in participation brings added benefits to all contract users.

SHI's marketing or outreach to contract users is a multi-prong approach:

SHI's CRM System has been uploaded with every entity capable of using the contract. Each Account Executive establishes a relationship with each purchasing agent/buyer and IT administrator within the organization and update our CRM so that we can verify that they have been reached. The SHI Account Executive discusses the contract with them and provides them with contact information, website information, and contract guidelines for working with SHI. SHI's Account Executives are proactive in their approach with our customers and prospects, and they regularly engage in on-site meetings and joint phone calls with our publisher representatives.

SHI's Inside Sales Team members walk individual customers through our www.shi.com website where customers can create quotes, purchase items, obtain order status, and generate reports of their purchases.

SHI's marketing team subscribes our new CRM contacts to SHI's monthly newsletter, which contains helpful information on SHI's publishers, new products and promotions, changes to programs, and industry news.

SHI participates in Statewide and local vendor events. SHI Account Executives and publisher partners meet with all available entities and discuss SHI's support plan and our partners' solutions.

SHI works with each customer to create timely and meaningful Tech Days for individual State and local entities to attend to learn about new solutions for their IT environments.

Each of these elements come together to ensure that SHI meets or exceeds the requirements of this contract.

7. Provide a workplan laying out key steps and the estimated timing based on your experience.

SHI has decades of experience supporting contracts that represent a broad portfolio of services and products for a range of Public Sector entities. If awarded, we bring to this new contract both a deep desire to partner with the State and fresh, innovative perspectives for your Members. We expect the transition to a new partnership will be seamless, and we will assist in that transition by supporting the State and its members personally, starting with our VP of Public Sector, Denise Verdicchio. Denise is committed to the success of our partnership from day one of an award, and she will dedicate her energy to making this partnership a thriving one.

We understand the intricacies of implementing and maintaining a software contract, advocating for multiple agencies and municipalities. When we enter into an agreement of this magnitude, we take great care to implement support and service plans to meet the needs of each contract user. Thus, SHI will meet with the key stakeholders to draft and establish a workplan detailing key steps specifically tailored to the State's needs.

8. Describe best practices and lessons learned regarding the transition process.

SHI understands the State's concern of switching to a new vendor and the desire to for a smooth transition during this process. While we cannot guarantee there will not be some missteps along the way, we do feel strongly that the combination of a clearly defined plan, a dedicated and local account team, including a Project Manager, our local partners and our commitment to transparent communication along each step of the process will help provide as smooth a transition as possible.

9. Provide an example of an implementation plan for this project or a similar project.

It is essential to begin the onboarding process before contractual deadlines to reduce operational challenges.

The transition checklist includes:

- Understand desired business outcomes.
- Identify customer and partner key stakeholders.
- Internal employee communication of pending transition.
- Provide SHI copies of Microsoft agreements and amendments.
- Authorization SHI to pull a Microsoft Licensing Statement.
- Develop customized transition plan

Below is a high-level sample implementation timeline:



10. Provide an example of an implementation checklist for this project or a similar project.

SHI will build a schedule based upon the detail provided and will seek feedback and approval from the State. When approval is received, SHI will begin assembling the assigned team for the software transition begin deployment according to the approved schedule.

Critical milestones include:

- Contract kick-off meeting to introduce key stakeholders and review scope.

- Identify and assign key transition personnel.
- Identify and assign key service and support personnel.
- Develop communication and escalation plan.
- Implementation of E-Commerce Web Portal for procurement and acquisition.
- Discovery of existing assets to be transitioned.
- Discovery will include a detailed asset inventory complete with warranty expiration dates.
- Develop refresh and deployment plans.
- Establish processes and procedures for support:
- Identify risk and contingency plans.
- Define agency roles and responsibilities.
- Define vendor roles and responsibilities.
- Finalize organization chart with roles and responsibilities.
- Develop contingency plan for failed services.
- Develop transition acceptance procedures.

Develop management controls to include:

- Transition progress control.
- Quality control.
- Change control.
- Version control.
- Issue management

11. Financing

The questions in this section are for informational purposes only and will not be evaluated.

1. Please describe financing options that you could provide to the State.

Understanding that payment needs vary on an individual customer basis, SHI offers several billing options. Your dedicated SHI Account Team will work closely with the State to understand your billing needs and will work in coordination with your assigned SHI Accounts Receivable representative to establish a billing method that works for you.

Transactional Invoices

At the time of shipment, SHI will provide an invoice for each shipment under each customer purchase order number. Our standard payment terms are Net 30 Days.

Monthly Summary

The SHI consolidated billing option can offer tremendous savings; at the end of each month a single invoice will provide a detailed account of all transactions processed for that month. SHI's standard payment terms for monthly invoicing are Net 15 days.

Corporate Procurement Card

Many of our larger customers have implemented a Corporate Procurement Card Program, which SHI supports through our acceptance of MasterCard, Visa, and American Express. SHI provides Level II reporting data for credit card transactions, which means we are able to provide order header information on your credit card Statements. There is an additional fee per credit card transaction.

Financing

SHI Capital offers flexible payment solutions for our customers to finance 100% of their equipment, software, and services with 0% down payment, allowing them to preserve cash and accelerate their ROI while hedging against inflation and keeping updated with the latest technology

2. Please specify whether the options listed in your response above could be included as part of this contract or would require a separate contract.

All options listed above could be included as part of this contract.

3. Please detail who would provide the financing (e.g., you, a third-party subcontractor, etc.).

SHI Capital will be providing financing to the State.

12. Transition at Contract Termination

1. Describe how you would transition the necessary information (order history, license information, etc.) to an eventual successor reseller?

SHI understands that transitioning from one service provider to another can be disruptive, and we will work with you and your previous provider to ensure a smooth transition. It is essential to begin the onboarding process before contractual deadlines to reduce operational challenges.

The transition checklist includes:

1. Understand desired business outcomes.
2. Identify customer and partner key stakeholders.
3. Internal employee communication of pending transition.
4. Provide SHI copies of Microsoft agreements and amendments.
5. Authorization SHI to pull a Microsoft Licensing Statement.
6. Develop customized 1–3-month transition plan.

2. Provide a high-level plan for transition out assistance services. Include a high level workplan and associated timing.

SHI understands the State's concern of switching to a new vendor and the desire to for a smooth transition during this process. While we cannot guarantee there will not be some missteps along the way, we do feel strongly that the combination of a clearly defined plan, a dedicated and local account team, including a Project Manager, our local partners and our commitment to transparent communication along each step of the process will help provide as smooth a transition as possible.

3. How much lead time does your company recommend for starting a transition?

Because communication is critical to the success of this contract, we are suggesting the following:

- Immediate introduction of SHI support staff to your operational staff;
- Weekly (or monthly, as needed) calls with AE and your operational staff to review SLAs;
- Quarterly business reviews with SHI Executive Management; and
- Daily interface with Account Executive and operational staff during transition period.

13. Other

1. In cases where you are the only entity to receive version upgrades or patches from the OEM, propose and describe a means of distributing these to license holders. Acceptable methods include distribution of media, provision of access to a secure web site to download the upgrades or patches, or information provided to license holders which will enable them to access the appropriate area of the OEM web site.

Our process to provide ongoing product updates and strategic planning is predicated on consistent and transparent communication with the State. Your SHI Team will meet with individual contract users to review products and service offerings. During these review meetings, we discuss purchase history, as well as the customer's future plans. Additionally, SHI will leverage our extensive internal support for each OEM to benefit the State. As we learn about new product information, improved services, or any insight applicable to your success, the Account Executive will share that information and consult with users immediately. This will ensure that all parties involved are constantly able to make well-informed decisions.

Concurrently, SHI brings subject matter experts with us to our business reviews to review the product roadmaps for each OEM. Because we partner very closely with our OEM counterparts in the field, we are able to ensure that a true partnership exists between our customers, the OEM, and SHI throughout the contract term.

Additionally, SHI has patch management procedures in place. Security patches are reviewed with priority, and after proper testing are distributed to the systems for which they are relevant. Critical updates and patches are deployed within 30 days or sooner to minimize the risk. Other patches are first assessed based on business benefits and are thoroughly tested before being implemented. Any security patches/fixes and updates for third party products SHI resells is the responsibility of the manufacturer.