



CORE BTS, INC.

COMPANY INFO

WINTER 2014



I.T. STARTS HERE



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## CORE BTS – COMPANY INFORMATION

# WHO WE ARE

# WHAT WE DO

Core BTS is a growth-oriented, super-regional technology services company with 13 offices in 8 states and 350 employees whose efforts drive 2,500+ customer relationships.

Core's vision is to envision, execute and enable IT experiences across its footprint. It is this vision that acts as the roadmap for each customer engagement and provides Core the inspiration to understand each customer's individual organizational needs.

Consolidating 74 years of technology experience, Core has employed its vision with clients in every major industry, including local small businesses, national healthcare facilities and multinational technology services organizations. During the course of these continued relationships, Core has implemented traditional and emerging technologies and services to enhance business, infrastructure and operational value and ensure shared success.

### HISTORY

Core's story is one of convergence – bringing together the right people and organizations to build a leading provider of business technology solutions.

### MISSION

Listen, learn and communicate to create, provide and support the most innovative technology solutions for our valued customers, employees and investors.

### STATISTICS (2012)

- 40%+ Collaboration Growth
- 70%+ Cloud Services Growth
- 100+ New Customers
- 75 New Employees

**I.T. STARTS HERE**

CORE BTS IS A SUPER-REGIONAL TECHNOLOGY SERVICES COMPANY.

DELIVERING THE MOST COMPLETE, CUSTOMER-CENTRIC I.T. EXPERIENCE.

**LOCATIONS**

**STATS**

- **FOUNDED:** 2004
- **EMPLOYEES:** 350+
- **LOCATIONS:** 12 OFFICES, 7 STATES
- **PRIMARY SERVICES:** DATA CENTER, COLLABORATION, SECURITY, CLOUD TECHNOLOGIES; MANAGED SERVICES

**ACQUISITIONS**

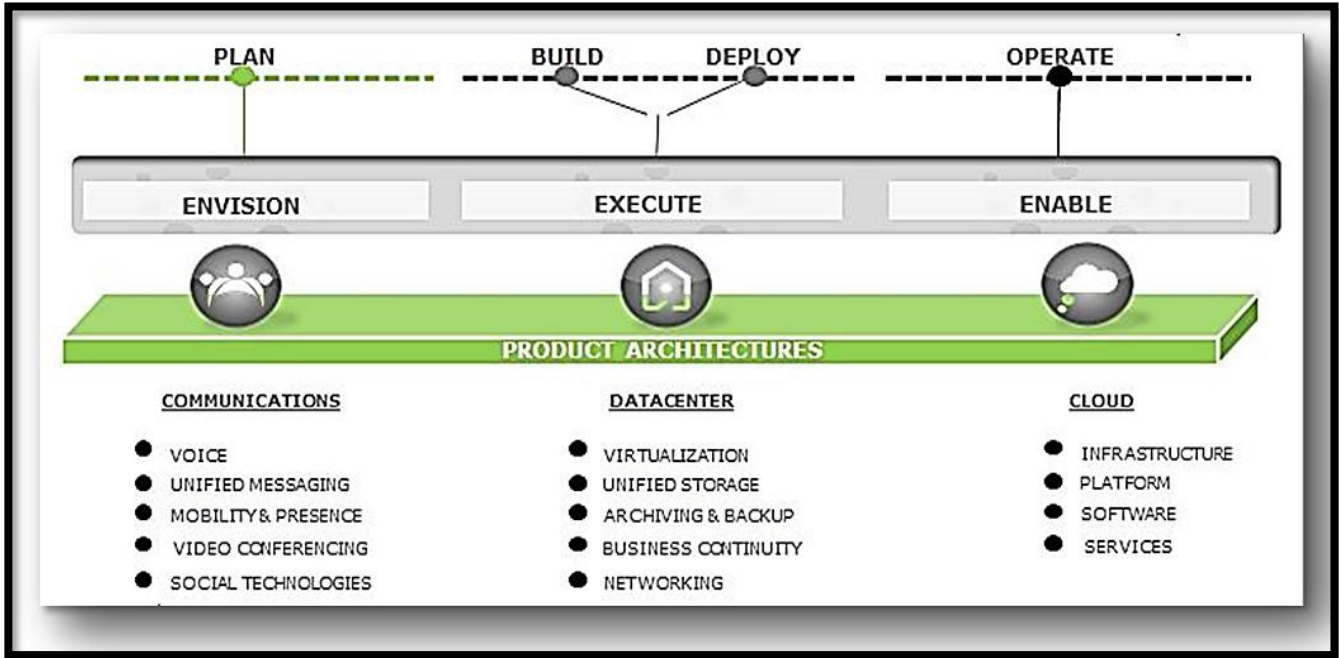
- CTI – OCTOBER 2004
- OST – NOVEMBER 2004
- WORLDNET – FEBRUARY 2005
- AAA NETWORKS – AUGUST 2005
- CORE – FEBRUARY 2006
- INACOM – AUGUST 2009
- TRANSTEC – NOVEMBER 2012

**TRUSTED PARTNER** I.T. experience transformation cannot be done alone. Core's partners, including Microsoft, Cisco, EMC, VMware, Citrix, HP and others, act as their pillars of success and enable Core to deliver on its vision. Additionally, Core's employees are annually recognized as the top talent in the industry, proven by attaining the highest level partner certifications and highlighted by achieving Cisco's Customer Satisfaction Award (4.96/5.0).

**SOLUTION INNOVATOR** From inception through adoption, Core delivers a complete technology lifecycle of solutions. Through its strategic partnership status with global leaders, customer-centric approach and highly-skilled employees, Core employs a results-oriented framework of concepts and practices ensuring consistent, predictable and quantifiable results for each organization. Core's innovation and success has been recognized by industry publications including being named CRN's "Tech Elite 250," "Top 100 Healthcare VAR," "Top VAR 500," as well as Cisco 2011 "Break Away Partner of the Year."

Core leadership serves on the Citrix Council, Cisco Partner Advisory Group, Cisco Marketing Council and the EMC Advisory Council, among others. They are considered primary experts in the IT industry for sharing insight through public appearances and co-authorship.

madison, WI   milwaukee, WI   appleton, WI   indianapolis, IN   nashville, TN   exton, PA   reading, PA  
bridgewater, NJ   washington, DC   new york city, NY   long island, NY   garden city, NY   alban, NY



From inception through adoption, the Core teams deliver a complete technology lifecycle of solutions. Through its strategic partnership status with global leaders, customer-centric approach and highly-skilled employees, Core employs a results-oriented framework of concepts and practices ensuring consistent, predictable, and quantifiable results for your organization.

**COMMUNICATION TECHNOLOGIES**

Because fast and reliable information exchange is vital to the success of every organization, Core provides leadership in Communication Technologies from immersive video conferencing, customer care and messaging, to IP communications, virtual meetings and mobile applications. Overall, Core offers a solution-based approach focused on improving meaningful communication, uniting today’s flexible, decentralized workforce, and increasing organizational agility in the market – all impacting the bottom line.

**SOLUTION INNOVATOR**

*Core fuses business analysis, network readiness, private and public training, and communication technologies expertise to create a complete life-cycle approach. This proven approach is built to deliver on the specific organization’s communication vision and drive system-wide efficiencies and productivity.*

**DATA CENTER TECHNOLOGIES**

The data center is the foundation of your IT operations. You want a stable foundation allowing for flexibility in your current state, scalability into the future and simplified management, while lowering total cost of ownership. Data center solutions can elevate any and all parts of your enterprise infrastructure, enabling an optimized, reliable IT experience. Through the leadership of Core BTS, technology convergence within the data center enables

organizations to transform their IT infrastructure into a more efficient, responsive and resilient asset, uniting network, computing, and virtualization resources into a single, seamless solution to reduce TCO, and increase business agility.

#### SOLUTION INNOVATOR

*Ultimately, core has the ability to deliver network infrastructure, virtualized compute and storage solutions individually or integrate them as a unified virtual infrastructure. The core data center technologies group fuses these areas of expertise with global partner relationships to create a complete lifecycle approach, delivering on the customer's vision.*

### SECURITY TECHNOLOGIES

Security protects the confidentiality, integrity, and availability of business intelligence and custodial data. It involves the people, processes and technology within the organization, analyzes risk, validates authorities and complies with industry standards. Core's Security Practice offers assessment, consulting, architecture design, security control implementation services and education to organizations of all sizes across diverse industries. Our projects are delivered by highly skilled and trained consultants and engineers using proven methodologies customized to address the unique business objectives, risk profile and compliance requirements of each client.

#### SOLUTION INNOVATOR

*Core's security technologies practice fuses a service delivery model, security-specific certified team and top-tier global partner certifications to create a complete lifecycle approach and deliver on each customer's vision. We utilize our extensive experience and information security expertise to help you identify, understand and remediate security weaknesses and vulnerabilities related to people, processes and technology.*

### CLOUD & MANAGED SERVICES TECHNOLOGIES

Core's cloud technologies are uniquely designed to enable each client's journey to the cloud. Whether that is built through a private, hybrid or public solution, or the insertion of a point solution, Core has the experience to align the correct solution to meet each client's organizational need. Core's Cloud Technologies platform fuses project objectives and analysis, with proven leadership, including management and support.

#### SOLUTION INNOVATOR

*Core's innovation shines through its cloud technologies focus area, as it encompasses the products, services, and talent to deliver any desired cloud solution specific to the customer's vision.*

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## CORE BTS DELIVERY CAPABILITIES AND PROFESSIONAL SERVICES ORGANIZATION

*Core supports their clients both domestically and internationally within our key disciplines, with a geocentric delivery model including national practice leads, solution architects, and engineers combined with regional & local in-market practice leads, architects, & delivery engineers.*

*Our philosophy on technology, whether it is a minor expansion or a full scale enterprise-wide deployment, is to first and foremost match the appropriate technologies with the business/operational needs of each customer as the driving force behind any decision. To that end, Core has the business analysts and engineering resources to identify an organization's business requirements and to then design, develop, implement and support the technology that meets these needs. We believe from our experience this leads to better results that has faster adoption and a higher short and long term return on investment for our clients. Core has a strong internal team of skilled and certified IT professionals that include:*

CISCO CERTIFIED PROFESSIONALS INCLUDING CCIE VOICE (1), CCIE ROUTING/SWITCHING (6), CCVP (4), CCDP (7), CCNA (39), CCNA VOICE (11), CCNA SECURITY (3), CCNA WIRELESS (6), CCNP (19), CCNP VOICE (15), CCNP SECURITY (1), CCNP WIRELESS (2), CCDA (18), CSE (14) CCSP (4)

MICROSOFT CERTIFIED PROFESSIONALS INCLUDING MCSE (21), MCPS (30), MCT/TRAINERS (7), MCTS (16), MCSA (17)

CITRIX CERTIFIED PROFESSIONALS INCLUDING CCIA (1), CSP (15), CCA (10), CCEE (3), CCAA (1)

EMC CERTIFIED PROFESSIONALS INCLUDING TA (5), SA (7), IE (8)

VMWARE CERTIFIED PROFESSIONALS INCLUDING VCP (13), VSP (17), VTSP (7)

NETAPP CERTIFIED PROFESSIONALS INCLUDING NASP (4), ASAP (10), NCDA (2), SAN (NCIE-SN) - (1), NAIP (2)

SECURITY PROFESSIONALS INCLUDING CISSP (11)

### **DEDICATED PRACTICE UNITS INCLUDING:**

- Unified Voice & Video Communications & Collaboration
- Data Center including Core Network Infrastructure, Storage & Virtualization (est. 2005)
- Business Management Services
- Network Infrastructure including switching/routing, and wireless
- Server Infrastructure
- Security
- Managed Services

**CISCO PARTNERSHIP**

Core has access to world-class products and service programs, technical support, productivity tools, and training to deliver intelligent, integrated network solutions that meet your business needs. Recognized as one of Cisco Systems’ largest national and local Gold Certified Partners, with their coveted service excellence “star,” Core is expressly qualified to provide, implement, and maintain the solutions we offer. As a Cisco Gold Certified Partner, Core has achieved the highest level of credibility and the broadest range of expertise across multiple technologies. This, combined with integrating the deepest level of Cisco lifecycle services expertise into our offerings, we demonstrate a measurably high level of customer satisfaction. Core has access to world-class products and service programs, technical support, productivity tools, and training, and we are prepared to deliver intelligent, integrated, network solutions that meet your business needs.

**CORE IS IN THE TOP 25 OF CISCO’S LARGEST U.S. CHANNELS PARTNERS. CORE’S CERTIFICATIONS INCLUDE THE FOLLOWING:**

- Cisco Gold Certified Partner – achieved in 2003
- Core has been certified to install Advanced Routing & Switching solutions as well as Advanced Unified Communications solutions since 2004
  - ✓ Core established its Advanced Routing & Switching practice in 1998
  - ✓ Core established its Advanced Unified Communications practice in 2001
  - ✓ Cisco WebEx authorized

**NATIONAL RANKING**

**CISCO ADVANCED TECHNOLOGY SPECIALIZATIONS**

- CISCO MASTER OF UNIFIED COMMUNICATIONS SPECIALIZATION
- CISCO MASTER CLOUD AND MANAGED SERVICES
- ADVANCED BORDERLESS NETWORK ARCHITECTURE SPECIALIZATION
- ADVANCED COLLABORATION ARCHITECTURE SPECIALIZATION
- ADVANCED DATA CENTER ARCHITECTURE SPECIALIZATION

**CLOUD PARTNER**

- CLOUD BUILDER-INFRASTRUCTURE, MANAGEMENT AND SERVICES
- STORAGE : EMC
- VIRTUALIZATION : VMWARE
- VIRTUALIZATION : CITRIX
- CLOUD MANAGEMENT : VMWARE
- CLOUD PROFESSIONAL SERVICES

**CISCO AUTHORIZED PARTNERS**

- CISCO AUTHORIZED DMS PARTNER

**OTHER AUTHORIZATIONS**

- REGISTERED PARTNER
- LEARNING PARTNER - ASSOCIATE
- ACCELERATED TELEPRESENCE TRY AND BUY
- CISCO CAPITAL FINANCING
- CISCO SMART CARE SERVICE
- CISCO SMART CARE SERVICE CSCC QUOTER
- CONTENT SECURITY REBATE PROGRAM2
- CUSTOMER SATISFACTION EXCELLENCE
- GPN CERTIFIED AGENT
- INDIRECT SERVICE DISCOUNT PROMO
- IRONPORT GOLD CERTIFIED
- REGULAR TRY AND BUY
- UCS CAPACITY ASSURANCE-TRY AND BUY
- WEBEX COMMISSION PILOT PROGRAM
- WEBEX TELEPRESENCE PROGRAM
- ATP - CISCO TELEPRESENCE VIDEO MASTER
- ATP - IDENTITY SERVICES ENGINE

Core leadership sits on a variety of Cisco advisory councils, including the Cisco Technical Advisory Board for data center technologies.

## VIDEO

Core offers video solutions from an immersive, dedicated room system to the individual desktop. Core presents a solution-based approach focused on improving meaningful communication, uniting today's flexible, decentralized workforce and increasing business agility in the market – all impacting the bottom line. Core is a Cisco Advanced TelePresence Partner (ATP) and has also achieved the Cisco TelePresence Video Master Authorized Technology Provider credential. Core's ATP, Cisco Gold, Microsoft and National Systems Integrator (NSI) partnerships, and WebEx and digital media expertise uniquely position us at the forefront of the communication transformation.

Core was *one of only four organizations in the world* to hold the highest certification with Tandberg, Cisco UC Mastery, and Cisco Managed Services Mastery Specialization, when these certifications were first introduced. Core continues to hold all of these certifications at the highest level available.

Core is currently implementing Cisco's new Active Collaboration Room (ACR), Digital Media Suite, Show and Share, and other newly released Cisco collaboration solutions in our Madison, Exton and Washington D.C. offices for customers to see and use.

One of the keys to our success with customers and their video initiatives is our Experience Management Services. From that group we leverage business analysts to help work with customers to identify, clarify, and confirm business use cases. This ensures that technology implemented benefits the business as expected, with our primary goal of exceeding expectations. Additionally, business analysts observe and communicate on a spectrum from end-users to initiative stake holders, so all will understand common objectives and scope. Core also includes technology adoption to make sure users are comfortable using new solutions and maximizing business value.

## MICROSOFT PARTNERSHIP

Core BTS is an award winning Microsoft Certified and nationally managed partner. Thus, Core and Microsoft work together very closely to develop and implement delivery strategies across multiple geographic and product segments. Microsoft's ongoing focus and engagement with Core includes overall strategic planning, greater alignment and engagement of Microsoft field resources, collaborative efforts, and deeper product team engagement, as well as executive sponsorship. This strong relationship reflects Core's industry-leading Microsoft solution expertise, our deep commitment to Microsoft technologies, and our geographic and customer impact to Microsoft's business.

### Core's Microsoft specializations and competencies include:

- Gold Server Platform
- Gold Learning
- Silver Collaboration and Content
- Silver Communication
- Silver Management and Virtualization
- Silver Hosting
- Silver Messaging
- Cloud Essentials, Cloud Accelerate

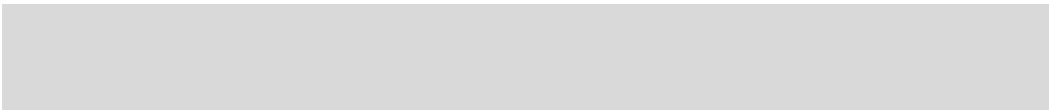
Core BTS is recognized as one of only a small handful of partners globally that have both Microsoft Gold and Cisco Gold certifications.

## CITRIX PARTNERSHIP

Core is one of 10 nationally managed Citrix Platinum Partners in the Americas region (Canada, US, Mexico, Brazil). This region consists of thousands of partners: only the top are elevated to Platinum status. This is a reflection of our ability to deliver across the Citrix product line (XenApp, XenDesktop, NetScaler, Branch Repeater, etc.) at an extremely high level with top tier architects and engineers.

Core has eleven full-time high level architects and engineers on staff that deploys Citrix technologies exclusively. These individuals hold Citrix Certified Enterprise Engineer and Citrix Certified Enterprise Administrator





certifications. Core also employs four additional full time Citrix certified employees who have the ability to deliver on a subset of Citrix technologies, primarily XenApp and XenDesktop.

Core has designed, installed, and configured many thousands of seats of XenApp and XenDesktop for clients ranging many verticals (banking, finance, health care, manufacturing, nonprofit, etc.) and continues to provide ongoing support, monitoring, and maintenance for the majority of them. Core uses our industry experience and Citrix reference architecture to create a Citrix environment that correctly meets each client's needs and project requirements.

Core has experience designing and implementing many larger Citrix environments that span multiple data centers & countries for high levels of availability and resiliency within the Citrix environment. This includes designing and implementing Citrix features such as Global Server Load Balancing, Branch Cache, Application Acceleration, and Application Firewalls using tight integration of the Citrix NetScaler product line.

### **EMC PARTNERSHIP**

Core holds the Signature Velocity partnership status with EMC, by holding specialization certifications in Consolidate, Advanced Consolidate, Backup & Recovery and Isilon Technologies. Core is also an Advanced Services Network (ASN) partner. As an ASN partner Core can be subcontracted by EMC to implement their products sold direct or by other partners that may not have the experience or certifications required. Core has been involved in several EMC complex projects that require replication and integration with virtualized environments and core networks

Core is an RSA Affiliate Elite partner. We're also certified on Data Loss Prevention and enVision.

Core's partnerships with both RSA and Archer date prior to EMC's acquisition of each organization.

### **VMWARE PARTNERSHIP**

Core is a VMware Premier Solution provider with specializations in Infrastructure Virtualization, Desktop Virtualization, and Business Continuity. Core was selling and implementing VMware solutions prior to VMware having any Wisconsin-based account teams. Not only has Core helped customers successfully virtualize their standard applications, but also their Tier 1 applications often not considered for virtualization.

Core offers official VMware curriculum via our Core learning division. We have also provided custom training for some of Wisconsin's largest companies.

### **NETAPP PARTNERSHIP**

Core is a NetApp Gold Partner, with across-the-board expert level certification, signifying NetApp's recognition that Core has the advanced technical capabilities that are required for the design and implementation of any/all NetApp storage solutions in complex computing environments. Further, Core has been designated a "go-to" partner by NetApp for deployment and support of their FlexPod Data Center Solution, based on the depth of Core's expertise with Cisco and Citrix technologies.

### **INGRAM MICRO PARTNERSHIP**

Core has a long-standing partnership with Ingram Micro, the world's leading distributor of IT hardware, and has worked with the companies in their world-wide Ingram Micro Services Network on many occasions. This relationship dates back to 1987, and for the last several years, Core has had "Strategic VAR" status with Ingram, the highest partnership level that is available.

## CORE BTS – DIFFERENTIATORS AND VALUE ADDED SERVICES

Core is a business transformation company providing organizations comprehensive IT solutions from data center deployments to a variety of cloud and virtualization services. Core recognizes and respects the current level of competition in the industry. This recognition along with our enthusiastic corporate culture inspires us to continually improve and be the best at delivering service excellence. We know we are not your only choice, but we are the first choice for thousands of organizations around the country because we offer you these differentiators that set us apart:

<b>EXPERIENCE</b>
Our engineers have logged millions of hours on various projects, and each member of our executive team has their roots in technology. We know this business inside and out and bring our expertise to every meeting with you.
<b>CUSTOMER SERVICE</b>
Second to none: you have a deadline to beat, budget to meet and expectations to exceed. Every single employee at Core strives to make this happen, day in and day out. That means that every order is double-checked for accuracy, every invoice is clear and detailed, and every phone call and meeting addresses your concerns.
<b>SOLUTIONS PORTFOLIO</b>
Whether it is a large, multi-faceted project or a number of different projects at different times, you can take comfort in the familiarity and trust that a single solution provider can bring. Core's expansive solutions portfolio means that we can handle just about any project, regardless of size, providing you the familiarity and service that only a consistent team can bring.
<b>SUPPORT</b>
With Core there is a beginning but there is no end. Not only do you get the personal support you expect during a project engagement, but also can explore the options of customized on-site training and 24x7x365 NOC support.
<b>PROGRAM AND PROJECT MANAGEMENT</b>
Core Business Management Services (BMS) combines the people, processes and services that surround any IT experience. Through Core's proven engagement methodology method, you can maximize every dollar and make your IT investments more effective.

We provide **technology-neutral assessments** of your business to understand how end-users work with technology and how you would like technology to work for them. We employ I.T. Information Library (ITIL) best practices for IT management and best-in-class Project and Program Management. And we offer the best IT training division in the nation to ease the adoption of technology for everyday use.

This unique, **all-encompassing methodology** provides true ongoing support and ROI realization throughout the life of the project. Core has hand-picked each individual on this team to bring you the world-class talent that you expect. They are experienced professionals, with certifications in their respective roles.

Many solution providers employ a lifecycle management approach, but none are as comprehensive or successful as the one-of-a-kind model that Core has built. **Core's delivery model ensures maximum efficiency, communication and ROI for each and every project.** Every project Core delivers is internally reviewed for excellence at the critical stages of delivery. The talent of the Core team gives customers the confidence and knowledge that their project will be done correctly and bring added-value to their business.

## EXPERIENCE MANAGEMENT SERVICES



## ENVISIONING SERVICES

Core BTS' Envisioning services help our customers define success criteria in solving their business problems. The techniques applied by this team include business analysis, elicitation, requirements gathering and validation, enterprise analysis, requirements analysis, solution assessment and validation and adoption. The Envisioning team leverages our business analysts, risk and compliance consultants, and practice directors who identify, then translate business drivers into actionable plans. The results of these engagements include deliverables which can be consumed by C-level, business unit stakeholders and IT. Envisioning services engagements typically answer questions such as: What is the problem we are trying to solve? What are the requisite resources to solve the problem? When do we need to solve this problem? How will we know when we are done? What are the success criteria? Are we ready to solve this problem? What are the early wins we can demonstrate?

As an overlay to our five technology disciplines— or focus areas—around which we deliver projects and ongoing support for our clients, is our training and project/program management service. Both of these Core BTS areas have been very positively received and as a result our program management team has been engaged to oversee other companies' projects for our clients.

## DEDICATED PROJECT MANAGEMENT ORGANIZATION (PMO) WITH CERTIFIED PMP'S ON STAFF

The critical benefit of effective program and project management is that it provides the framework that enables the delivery of products and services that meet client business needs with a high quality result in predictable and efficient time frames. Through a consistent model and approach the Core BTS project management team takes a project from discovery to production. Core BTS maintains a high level of organizational capability for project management activities via its selection of qualified staff, alignment with PMI (Project Management Institute) principles, active oversight of ongoing projects, and our commitment to an involved Project Management Office. Project Managers are supported in their activities by common required practices, processes, documentation, and standards. These protocols enable predictable project execution and delivery of high quality outcomes for our clients. All efforts of significant size are required to employ a qualified project manager and adhere to our standard project management practices.

## DEDICATED NATIONAL TRAINING DIVISION

Core BTS Learning Solutions (Core BTS Learning), formerly Inacom Learning Solutions (Inacom), has earned national awards and been acknowledged by local business communities. It is consistently voted #1 IT Training Firm for a reason. Core BTS instructors and consultants have years of experience and hold the industry's highest levels of technical certification. Our professional instructors spend part of their time "in the field" designing, implementing, and supporting the technology they teach. They pass along their real world experience in the courses they teach, giving Core BTS a distinct value-add.

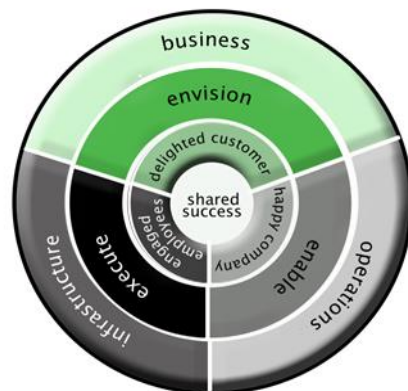
The state-of-the-art facilities offer hands-on training for practical applications. Whether your goal is to polish your marketable skills or needing to complete a full certification, Core BTS Learning's experienced staff will guide you in the classroom and continue to provide support after your course is completed. We can also bring the classroom to you through private, remote, and/or customizable training, ensuring your end-users are fully versed in any new technology: private training makes the technology adoption process painless.

## QUALITY ASSURANCE/QUALITY MANAGEMENT

### COMMITMENT TO EXCELLENCE

Core BTS strives to make each interaction one of value with a goal of service excellence. To that outcome we are invested in making sure that each solution has a project close including a delivery excellence review where we determine the success of the project. The project will not close until both parties agree that the deliverables outlined in the statement of work were met. Core BTS is open to fixed price projects as well as drafting warranty language into our statements of work (SoW). Core BTS' long term success depends on long-standing, mutually beneficial relationships, with whom we partner. We cannot achieve our goals unless we meet and exceed our customer commitments.

Customer satisfaction and service QUALITY is of utmost importance to Core BTS and its clients. In the event that there is a quality related issue on a project, Core BTS has a formal quality escalation process. This process begins with the submission of the incident by the project manager, managing consultant or the account representative. Additionally there is an email address that clients can use to report concerns ([quality@corebts.com](mailto:quality@corebts.com)). The reporting of an incident begins the review process where an internal review of the incident is performed to gather as much information as possible. This process may include but is not limited to project resources, account manager, and customer contacts. After the review is completed an action plan is put into place to resolve the issue as soon as possible. This process is overseen by the Business Manager, Consulting Services.



**VALUE**  
ensuring shared success

**SERVICES**  
envision | execute | enable

**TECHNOLOGIES**  
business | infrastructure | operations

## CISCO SMARTNET SERVICE OVERVIEW

### PROACTIVE TECHNICAL SUPPORT CAPABILITIES & SIMPLIFIED SMARTNET MANAGEMENT



#### CISCO SMARTNET CONTRACT MANAGEMENT

Cisco SMARTnet Service is an award-winning technical support service that can give your IT staff direct, anytime access to field engineers and Cisco.com resources to help ensure the fast, expert response and accountability required to resolve critical network issues. With Cisco SMARTnet Service you can choose from a broad range of service delivery options for all network devices.

Core BTS is a Cisco Gold Partner with a dedicated team focused on SMARTnet contract management. We specialize in proactively assessing customers' current Cisco SMARTnet maintenance spend and leveraging it against maintenance requirements and mitigated risk. Because our experts know how to consolidate and co-terminate multiple contracts, you receive the best pricing and effective management of multiple contracts.

#### OUR APPROACH TO CISCO SMARTNET SERVICE:

- Hands-on information analysis — our experienced SMARTnet experts first get to know your business needs, and then align those requirements to identify, assess, and manage your Cisco maintenance records.
- Contract status review — we review your current contract status to ensure your critical devices are covered and that less critical devices have appropriate coverage at a reasonable cost.
- Cost-effectiveness assessment — To give you the most cost-effective review, we assess coverage based on asset type, location, and usage within the network, including assets that have moved out of production and are at the end of their usable lifecycle.

#### CISCO SMARTNET SERVICE INCLUDES:

- Around-the-clock, global access to the Cisco Technical Assistance Center (TAC).
- Access to the extensive Cisco.com knowledge base and tools, for easy access to online technical information and service request management.
- Ongoing Cisco software operating system support on licensed operating system software, for covered Cisco products. Support includes access to both minor and major releases within the licensed feature set.
- Advance hardware replacement is available to fit the critical needs of your network. Next-business-day as well as premium service level options that provide parts replacement in as little as 2 or 4 hours are available depending on your preference and the type of contract coverage you select.
- Proactive diagnostics and real-time alerts on select devices with Cisco Smart Call Home.

*\*You may purchase different levels of SMARTnet depending on your needs.*

## CISCO SMARTNET DETAILS

*Cisco offers different levels of SMARTnet depending on your needs.*

### *SMARTNET SOFTWARE SUPPORT ONLY*

With the Cisco Base support program Cisco will provide access to its Technical Assistance Centre (TAC), twenty-four (24) hours a day, to assist you with product use, configuration and troubleshooting. Cisco will respond to you within one (1) hour for all calls received from 8: 00 a.m. to 5: 00 p.m. of the local TAC Time Zone for your region), Monday through Friday excluding scheduled local holidays ("Normal Business Hours") and for Priority 1 and 2 calls received outside the Normal Business Hours. For lower priority calls received outside the Normal Business Hours, Cisco will respond no later than its next business day. Cisco will use reasonable commercial efforts to generate solutions to software problems. Cisco will support each software release for thirty-six (36) months from the date of first commercial shipment of that release. Cisco will provide access to its web page, CCO, which will also provide you with new releases of software and/or documentation online.

### *SMARTNET ADVANCE REPLACEMENT*

Cisco Advance Replacement offers customers the flexibility to cover their equipment with an advance replacement service only. Cisco Advance Replacement provides a full year of advance replacement coverage, access to the public portion of Cisco Connection Online and technical support. Replacement hardware will be delivered by the Next Business Day (NBD), but no Software upgrades or updates are provided.

### *SMARTNET BASE*

Provides customers with software maintenance, registered access to CCO, advance replacement of hardware, and technical support required for self-maintenance. SMARTnet maintenance has three delivery options:

- SMARTnet Next Business Day (NBD)--8 hours/day, 5 days/week, next-business-day hardware replacement
- SMARTnet 8 x 5 x 4--8 hours/day, 5 days/week, 4-hour hardware replacement
- SMARTnet 24 x 7 x 4--24 hours/day, 7 days/week, 4-hour hardware replacement

### *SMARTNET ONSITE*

Provides all the benefits of SMARTnet maintenance, plus the presence of a Cisco trained Field Engineer to install your replacement hardware. SMARTnet Onsite has three delivery options:

- SMARTnet Onsite--8 hours/day, 5 days/week, next-business-day response
- SMARTnet Onsite 8 x 5 x 4--8 hours/day, 5 days/week, 4-hour response
- SMARTnet Onsite 24 x 7 x 4--24 hours/day, 7 days/week, 4-hour response

### *CISCO SMART CALL HOME*

Cisco Smart Call Home is a proactive, connected service capability of Cisco SMARTnet Service that is available on Call Home-capable devices, such as the Cisco Catalyst 6500 Series Switches. With the Smart Call Home feature of the Cisco SMARTnet Service, you get proactive, detailed diagnostics and immediate alerts on core network devices to help you quickly identify and resolve issues, conserving valuable staff time and improving network availability. Devices equipped with the call home technology can be enabled to continuously monitor their own health and notify you of potential issues using a secure, personalized web portal that contains messages, detailed diagnostics, and recommendations. If a serious problem arises, Smart Call Home can automatically generate a service request with the Cisco TAC that is routed to the right team for your particular problem. For a complete list of call home-capable devices, go to [www.cisco.com/go/smartcall](http://www.cisco.com/go/smartcall).

## CORECARE SERVICE OVERVIEW

### EVOLVE FROM A REACTIVE TO A PROACTIVE ENVIRONMENT

CoreCare is an innovative service that combines network-wide Cisco technical support with ongoing network monitoring and proactive maintenance to deliver a comprehensive approach to the care and continuous improvement of your network.

**A SIMPLE, COMPLETE SOLUTION:** Core BTS CoreCare Service provides technical support for your entire business network (including advanced security and IP voice solutions) with a single support contract. You receive expert technical support directly from Core BTS ongoing operating system and application software updates for all covered devices and applications, next-business day hardware replacement with an option to upgrade to four-hour advance replacement in the event of a failure, and a wealth of Cisco tools and resources through registered access to Cisco.com. As a result, you can take a comprehensive approach to the care and continuous improvement of your network for a single price, with a single point of contact.

**PEACE OF MIND:** Core BTS will proactively verify that your network is secure, reliable, and functioning optimally at all times. Additionally, Core BTS offers Service Level Agreements for help desk call-backs times, web portal availability, reporting, disaster recovery backups, and security monitoring.

**NETWORK VISIBILITY:** Cisco CoreCare Service delivers visibility into the health and security of your network, giving you the information you need to improve performance and increase your operational efficiency. Through a secure web portal, you can view the status of your overall network health, security, and voice performance anywhere, anytime. The Cisco certified partner maintains a clear, continuously updated picture of each device in your network to provide you with up-to-date status reports and identify potential problems.

**CONTINUOUS IMPROVEMENT:** Core BTS will perform periodic assessments of your network health and availability to proactively identify potential issues and help ensure that all of your Cisco devices are configured optimally, according to Cisco best practices. Depending on the technologies in your network, assessments also can include in-depth reviews of your network security systems and the performance and availability of your Cisco Unified Communications IP voice solutions. Core BTS will notify you if there is an issue with any Cisco device in your network and recommend how to address problems before they affect your employees and your business profitability. Core BTS can even perform a comprehensive analysis of your network to assess its readiness to support advanced IP voice communications solutions.

**A SIMPLE, COMPLETE SOLUTION:** Cisco CoreCare Service provides technical support for your entire business network (including advanced security and IP voice solutions) with a single support contract. You receive expert technical support directly from Core BTS ongoing operating system and application software updates for all covered devices and applications, next-business day hardware replacement with an option to upgrade to four-hour advance replacement in the event of a failure, and a wealth of Cisco tools and resources through registered access to Cisco.com. As a result, you can take a comprehensive approach to the care and continuous improvement of your network for a single price, with a single point of contact.

**CUSTOMIZED SUPPORT AND MAINTENANCE:** Cisco CoreCare Service is customized specifically for client to give you just the right level of network service to support the size and complexity of your business.

## FEATURES:

- ✓ Increases network visibility and provides you with the information needed to efficiently manage and improve the network
- ✓ Improves network uptime, security, and performance through ongoing monitoring and periodic assessments
- ✓ Allows IT staff to operate more efficiently by reducing the time and effort required to keep the network running optimally
- ✓ Enhances employee productivity and responsiveness through improved availability of essential business applications
- ✓ Optimizes business profitability by helping you get the most from technology investments
- ✓ Simplifies contract management and maintenance through a single service contract that covers all Cisco devices
- ✓ Combines the expertise and service advantages of both Cisco and Core BTS into a single offering

## VENDOR AND CONTRACT MANAGEMENT

Using the Discovery and Inventory capabilities of the CoreCare, we provide you with the most up-to-date view of your network and help ensure that your Cisco-approved devices are covered. In addition, we will provide information about any devices that are not covered, along with any emerging or potential service or support issues.

### **Discovery Service**

Discovery is a basic service that identifies hardware located on a network. Subsequent discoveries can be scheduled and comparisons made to the list of discovered devices currently stored in the Client database at Cisco.

### **Inventory Service**

Collected data includes items such as IP addresses, device types, serial numbers, software versions, and basic device system parameters, such as memory and flash. Sensitive information—such as usernames, passwords, and configuration files—is stored in the hardware or software network appliance.

## NETWORK ASSESSMENT (HEALTH, SECURITY, VOICE)

With Network Assessment, for a specified period of time, data about your network is collected using telnet, SSH, or SNMP. Only devices that may be accessed by the CoreCare network appliance will be included in the assessment and repair service. The data collected is then compared to predefined threshold values established by Cisco best practices, in order to assess the health and stability of each device.

### **Disaster Recovery**

The Disaster Recovery service backs up configuration files and related information about the routing, switching, and security solutions on customer's network.

### **Proactive Monitoring and Notifications**

The Proactive Monitoring and Notifications service provides continuous care for customer's network.

There are three Proactive Monitoring services available:

#### ✓ **Core Monitor**

The Core Monitor service uses both active (hourly) and passive monitoring of most Cisco Layer 2 and Layer 3 devices. The service examines device configurations and high-level syslog events, and generates messages



to your local syslog server, describing any modifications that may be required to properly configure each Cisco Layer 2 and Layer 3 network device.

✓ **Security Monitor**

The Security Monitor service examines syslog events, analyzing them for any evidence of possible virus infection or file corruption, and generating reports that detail any corrective action that may be required.

✓ **Voice Monitor**

The Voice Monitor service provides statistics on networks that currently have Cisco voice deployed. The service analyzes and reports on your network's total inventory of voice devices and applications, while also identifying any network characteristics that may adversely affect voice services.

**SERVICE LEVELS**

SMARTNET	CORECARE	DESCRIPTION
✓		ACCESS TO CISCO TAC FOR ALL SUPPORTED CISCO HARDWARE AND SOFTWARE IN THE NETWORK WITH SERVICE LEVEL BASED MAINTENANCE CONTRACTS
✓	✓	NEXT-BUSINESS-DAY STANDARD AND PREMIUM (4HR) ADVANCE REPLACEMENT FOR SELECT CISCO DEVICES ADVANCE REPLACEMENT OF CISCO DEVICES
✓	✓	SOFTWARE UPDATES AND MAINTENANCE RELEASES FOR QUALIFIED CISCO APPLICATIONS
✓	✓	CISCO IOS® SOFTWARE SUPPORT, INCLUDING MAINTENANCE RELEASES AND PATCHES, MINOR RELEASES, AND MAJOR RELEASES
	✓	CORE TECHNICAL EXPERTISE READY 24X7X365 TO ASSIST ON ALL SUPPORTED CISCO HARDWARE AND SOFTWARE IN THE NETWORK WITH A SINGLE NETWORK-WIDE MAINTENANCE CONTRACT
	✓	REMOTE MONITORING AND REPAIR OF CISCO DEVICES AND SOFTWARE APPLICATIONS
	✓	PROACTIVE HEALTH CHECKS AND PERIODIC ASSESSMENTS OF CISCO NETWORK FOUNDATION, VOICE, AND SECURITY TECHNOLOGIES TO BETTER IDENTIFY POTENTIAL ISSUES
	✓	PROACTIVE NOTIFICATIONS TO SIMPLIFY THE UPDATING OF CISCO DEVICES
	✓	ASSESSMENT AND PREPARATION SERVICES TO SIMPLIFY THE ADDITION OF NEW TECHNOLOGIES AND APPLICATIONS OVER TIME
	✓	IOS BACKUPS AND DISASTER RECOVERY

Direct integration between Core's NOC and Delivery teams allows seamless escalation if necessary, as well as continuous development and improvement, making this a truly integrated offering within Core BTS.


**Collaborative approach:** Core's ITaaS offerings are meant to augment (not replace) the client's staff and operations.

**All levels include: Monitoring, alerting, monthly/quarterly reporting, prescriptive guidance, and analysis.**

- ✱ **ITaaS: Service Desk:** On demand remediation. NOC remediation available at \$125/hour. If the incident requires escalation into Delivery there is a 6% discount on the hourly rate (based on resource/requirements).
- ✱ **ITaaS: Operations Management:** NOC remediation included (4 Hour Max). If the incident requires escalation into Delivery there is a 6% discount on the hourly rate (rate based on resource/requirements).

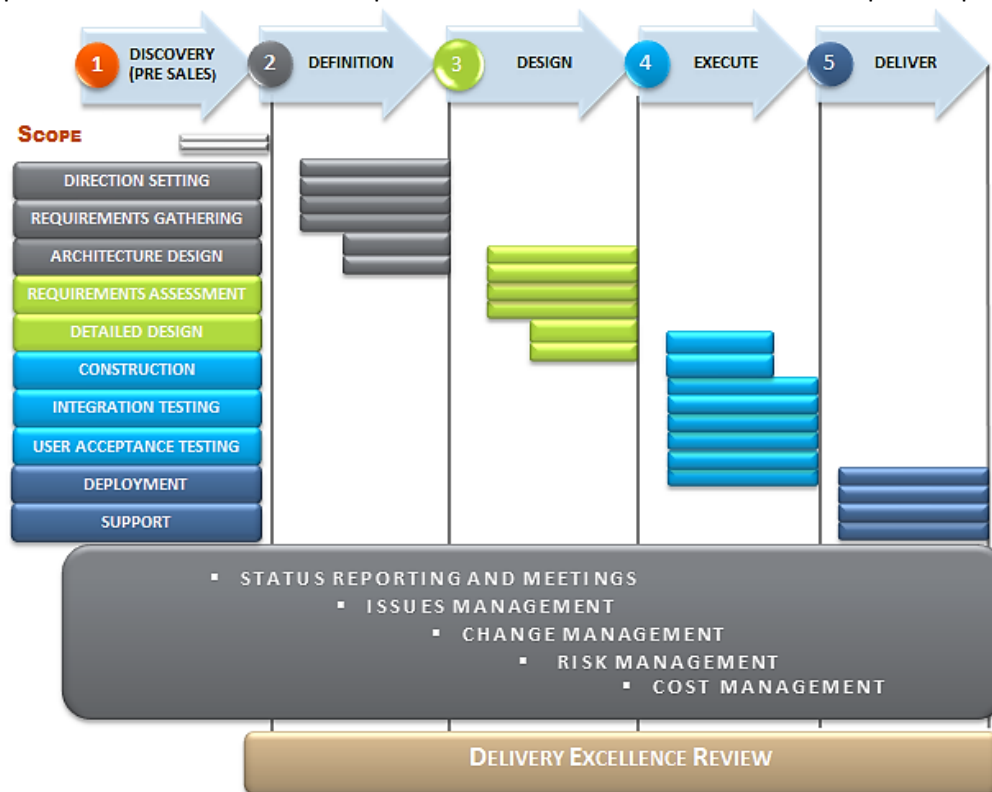
## PROJECT MANAGEMENT PLAN – METHODOLOGY OVERVIEW

*Core BTS project managers and consultants are trained and cultured in several cycle, delivery and business process methodologies, in order to provide a holistic, intelligent approach to our customers' needs.*

<p><b>ITIL</b> Iterative life-cycle planning and management for service management and application development.</p>	
<p><b>TOGAF</b> Business analysis, planning and implementation methods</p>	
<p><b>PMI</b> Project Management processes and best practices are used to define and document our project processes and procedures</p>	
<p><b>BUSINESS ANALYSIS</b> Standard methods for BA are utilized throughout our teams</p>	

To meet goals and objectives, a sound approach and methodology are important. It will ensure business objectives are understood and realized, focus the project team for efficient delivery and validate that the solution meets the objectives. The diagram below defines the high-level phases a project will iterate to meet the desired end state.

Each of these phases has a deliverable as well as Delivery Excellence Reviews (DER) which ensure the deliverables match work described in a Statement of Work (SOW). The foundations for each of these phases are tracks of work which develop supporting artifacts and further solution definition. The solution roadmap shown below provides a high-level view of the project phases and illustrates the customer the relationship between project phases relative to project completion. It is not intended to depict effort associated with each of the respective project phases.



## PROJECT PHASES

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At the highest level, there are five phases to a Core BTS project:

- **PRE-SALES DISCOVERY**
- **DEFINITION**
- **DESIGN**
- **EXECUTE**
- **DELIVER**

The end of each of these phases is marked by a Delivery Excellence Review (DER). The Delivery Excellence Review is conducted by Account Managers, Senior Architects, Practice Leads and Practice Directors to create a common, accepted view of solution delivery and support.

### **PRE-SALES DISCOVERY**

The **PRE-SALES DISCOVERY** phase is where Core BTS works to understand the business problem faced by clients. During this phase Core BTS will determine if we have the competency to meet the stated business objective.

### **DEFINITION**

The **DEFINITION** phase is where Core BTS begins direct customer engagement. The phase will engage Core BTS Business Analysts, Senior Architects, and Program Managers with the goal of formalizing project approach, schedule, scope, and client responsibilities.

#### **THE OBJECTIVES FOR THIS PHASE ARE:**

- **Perform direction setting activities**
- **Communicate engagement schedule and milestones with Customer**
- **Reach agreement on customer responsibilities and engagement assumptions**
- **Perform engagement kickoff meeting**
- **Understand conceptual solution definition (architecture)**
- **Communicate project costs, schedule, resourcing and risks with the project team**

#### **THE DELIVERY EXCELLENCE REVIEW FOR DEFINITION WILL:**

- **Assess project risks and mitigation plan**
- **Perform high-level architecture assessment, validating against scope**
- **Assess client readiness and resource availability (people and computing)**
- **Assess direction setting materials including final readout, future state architecture and initiative prioritization.**

#### **TYPICAL QUESTIONS ANSWERED FROM DEFINITION INCLUDE:**

- **Which design pattern is most appropriate to solve this solution?**
- **What technologies and processes are required to build the solution?**
- **What is the timeline, scope and effort for the following phase?**
- **How will the solution impact our current environment?**
- **What are the guiding principles for the architecture?**
- **What are the operational requirements for the solution?**
- **How will this solution impact the Disaster Recovery Plan?**

## DESIGN

The **DESIGN** phase is where Core BTS builds upon the Definition phase by further defining the solution. In this phase, Core BTS uses Security Consultants and Project Management to refine the solution to a detailed design. This is the final development phase before solution construction begins.

### THE OBJECTIVES FOR THIS PHASE ARE:

- Define detailed solution requirements captured in a solution design and requirements assessment document.
- Create detailed solution design specification
- Validate, and update where necessary, solution architecture

### THE DELIVERY EXCELLENCE REVIEW FOR DESIGN WILL:

- Review solution scope and requirement prioritization
- Review detailed design for solution accuracy and technical complexity
- Validate product placement and usage
- Review technical risks and validate mitigation plans
- Review actual vs. planned engagement expenditures

### TYPICAL QUESTIONS ANSWERED FROM DESIGN INCLUDE:

- What do we need to order (hardware/software/training) to build and operationalize this solution?
- What steps are necessary to move this solution to Production?
- How will each of the solution components need to be configured to work together as designed?
- Does the detailed design match the architecture design?

## EXECUTE

Just as the Design phase built upon the work completed in Definition, the **EXECUTE** phase builds upon the work efforts completed in Design. During this phase, Core BTS consultant(s) begin to build the solution based upon the Design and Requirements Assessment specification compiled during Design.

### THE OBJECTIVES FOR THIS PHASE ARE:

- Validate, and update where necessary, the solution design
- Implement and configure all products/components according to the solution design
- Conduct thorough unit and integration testing of solution components to assess quality

### THE DELIVERY EXCELLENCE REVIEW FOR EXECUTE WILL:

- Review updated solution design
- Review solution testing and defect resolution results
- Determine whether the solution is ready for deployment
- Determine organizational readiness for solution deployment
- Review actual vs. planned engagement expenditures

### TYPICAL QUESTIONS ANSWERED FROM EXECUTE INCLUDE:

- Does the build match the detailed design?
- Do the solution components work together as designed?
- Is Customer ready to support the solution in Production?

## DELIVER

The **DELIVER** phase includes the final project phases prior to full production deployment as well as the production deployment. During this phase, Project Managers, Engineers, and Technology Adoption Specialists work to deploy the solution and ensure solution adoption.

### THE OBJECTIVES FOR THIS PHASE ARE:

- Complete user acceptance testing so Customer is confident in solution quality
- Deploy tested solution to production environment
- Train users, administrators and operations staff
- Resolve solution installation, configuration and usability issues

### THE DELIVERY EXCELLENCE REVIEW FOR DELIVER WILL:

- Assess user acceptance of the deployed solution
- Review operations characteristics of the solution in production environment
- Review actual vs. planned engagement expenditures
- Obtain final signoff of project deliverables

### TYPICAL QUESTIONS ANSWERED FROM DELIVER INCLUDE:

- Does the solution resolve problems identified at the beginning of this project?
- Does the solution meet Customer expectations?
- Are users, administrators and operations staff adequately trained to support the solution?

The following deliverables will be produced during this project. Customer and Core BTS will work jointly to develop the deliverables with responsibilities as indicated below:

PHASE	DELIVERABLE	DESCRIPTION	CORE BTS RESPONSIBILITY	CUSTOMER RESPONSIBILITY
DEFINE	Kick-off Presentation	Outline of project objectives, stakeholders, approach and schedule Project schedule / timeline used to manage project activities	PRIMARY	ASSIST
	Project Plan		PRIMARY	ASSIST
	Requirements		ASSIST	PRIMARY
	Process Flow Diagram	Business, functional, and technical requirements Graphical representation of processes to be implemented	PRIMARY	ASSIST
DESIGN	Design Specification	Display of relationships between applications, field list, data driven events, page layout global reports, workspaces, notifications, and access control specifications.	PRIMARY	REVIEW
EXECUTE	Configured Solution	Working solution with all components outlined in the design	PRIMARY	ASSIST
DELIVER	User Acceptance Testing	User testing to determine if solution meets requirements	ASSIST	PRIMARY
DELIVER	Solution Administration Guide	Documentation outlining configuration and use of final solution(s) targeted towards solution administrators	PRIMARY	REVIEW
	User Documentation	User training materials outlining use of solution(s)	PRIMARY	REVIEW

PROJECT FORMS

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**PROJECT CHANGE CONTROL**

The following provides a Change Management Process to follow if a change to the Statement of Work (SOW) is required.

A Project Change Request (PCR) will be the vehicle for communicating change. The PCR must describe the change, the rationale for the change, and the effect the change will have on the project.

The designated primary contact of the requesting party will review the proposed change and determine whether to submit the request to the other party.

Both parties will review the proposed change and approve it for further investigation or reject it. Core BTS will specify charges for such investigation, if any. If the investigation is authorized, the primary contact will sign the PCR that will constitute approval for the investigation charges.

The Client will be responsible for any such charges, if applicable. The investigation will determine the effect that the implementation of the PCR will have on price, schedule and other terms and conditions of this Statement of Work.

A written Change Authorization must be signed by both parties to authorize implementation of the investigated changes.

**PROJECT CHANGE REQUEST (PCR)**

<b>Project Name:</b>			
<b>Requested By:</b>		<b>Request Date:</b>	
<b>Prepared By:</b>		<b>Prepared Date:</b>	
<b>Contact for Questions:</b>		<b>Telephone:</b>	

<b>Change Title:</b>		<b>Change #:</b>	
<b>Change Description:</b>			
<b>Project Components Affected:</b>			
<b>Project Timeline and/or Cost Impact:</b>			

**Disposition:**                      Approved: \_\_\_\_\_      Rejected: \_\_\_\_\_      Deferred: \_\_\_\_\_

**APPROVAL**

Authorized signature on this page by CLIENT authorized approver indicates that the project scope will change according to additions, changes, and/or deletions indicated above.

On behalf of CLIENT:

\_\_\_\_\_



# CORE BTS LOGISTICS MANAGEMENT

**SATISFACTION. DELIVERED.**



Core Logistics offers a customizable portfolio of services designed to save our customers time, money and headaches.

Core Logistics delivers pre-stage (assemble, burn in, test, and configure) equipment, asset tag and rack mount application, as well as rack-based delivery of equipment and disposal of all packaging. Additionally, reverse logistics for replacement gear is a valuable asset in the procurement process. Finally, Core delivers superior communication through its logistics managers who provide detailed tracking reports, equipment lists, and coordinate shipments.

Specific desired services, including same-day delivery from our ISO 9001 certified warehouse and customer kitting is also available, to improve process and deliver a superior experience for your business.

Core Logistics has helped streamline procurement for a variety of organizations across the United States as well as internationally, including global manufacturing facilities, healthcare organizations and education institutions. It's focused and secure process, coupled with its transparent Logistics Team delivers flexibility, confidence and freedom to your organization and employees.

All of these offerings, in combination with Core's legacy product expertise, technical support and enhanced partner inventory, position the customer for true operational excellence.

## WAREHOUSE OFFERINGS

ON-DEMAND WAREHOUSE RESOURCING THAT ENABLES YOU THE PROJECT FREEDOM YOU DESIRE. DELIVERABLES INCLUDE: 24x7 DISTRIBUTED STRUCTURES, DUAL/REDUNDANT BACK UP SERVERS WHILE BEING ISO 9001, ISO 14001 AND ISO 27001 CERTIFIED.

## CLEAR COMMUNICATION

CORE PRIDES ITSELF ON OFFERING THE MOST EFFICIENT LOGISTICS SERVICES. TO DO SO, CORE ASSIGNS A LOGISTICS OR PROGRAM MANAGER AS THE SINGLE POINT OF CONTACT FOR ALL LOGISTICS PROJECTS.

## FLEXIBILITY & CONFIDENCE

LOGISTIC SERVICES FROM CORE BTS DELIVERS A FLEXIBLE SOLUTION THAT ENABLES YOU TO EXECUTE YOUR WELL-PLANNED STRATEGY, WHILE GIVING YOU THE CONFIDENCE THAT THE JOB WILL BE DONE AS IF YOU WERE DOING IT YOURSELF.

ENGAGE WITH US



[www.corebts.com](http://www.corebts.com) | 1-855-CoreBTS | [info@corebts.com](mailto:info@corebts.com)



VALUE. DELIVERED

## BUSINESS CHALLENGES...

- ◆ Lack of IT trainers within an organization
- ◆ New technologies
- ◆ Employees at different skill levels
- ◆ Lack of formal curriculum available
- ◆ Low adoption rate = low ROI
- ◆ Lost employee productivity
- ◆ Lack of best practices
- ◆ Differing needs of learners
- ◆ Lack of one-on-one training

...**SOLVED**

### Public Schedule

Companies are looking for training solutions that can help their employees master the ever expanding technology used by today's businesses. Core BTS Learning's public training schedule focuses on delivering the most popular technology training courses on the market today. Our courses are delivered by trainers who have achieved the highest industry recognized certifications. Core BTS Learning's instructors stay sharp with hands-on field experience ensuring that you are learning from those who know how things work in the real-world.

### Private Classes

In today's busy marketplace many companies are looking for customized training solutions that can be tailored to fit the exact needs of their employees. Whether an organization needs a standard course for employees or a custom training solution, adjusting course content to eliminate topics that do not apply, or combining topics from different courses, Core BTS Learning can help. These classes can be delivered in our classrooms or a client site.

### Technology Adoption

Organizations are under pressure to introduce new technologies and stay ahead of the curve, but an implementation is only successful if people actually use the new technology. Many organizations struggle with users embracing change and new technology within an organization. Implementing a successful technology adoption campaign requires a significant commitment of time and resources. The Core BTS Learning Solutions team has experienced technology adoption specialists to help solve this challenge. We can help navigate the technology adoption lifecycle and bridge the gap between technology and productivity.





CORE LEARNING – TECHNOLOGY ADOPTION

**Technology Adoption**  
*Bridging The Gap Between Technology And Productivity*

**TECHNOLOGY ADOPTION OFFERINGS**

- **KNOWLEDGE ASSESSMENTS**
- **TECHNOLOGY ANNOUNCEMENTS**
- **CUSTOMIZED TRAINING DOCUMENTATION AND JOB AIDS**
- **CUSTOMIZED TECHNOLOGY DEMONSTRATIONS**
- **CUSTOM CREATED ELEARNING**
- **PROJECT TEAM AUGMENTATION SERVICES**

**THE TECHNOLOGY ADOPTION CHALLENGE**

Organizations are under pressure to introduce new technologies, but a technology implementation is only successful if people actually use the new technology.

Many organizations struggle with users embracing new technology and change within an organization.

Implementing a successful technology adoption campaign requires a significant commitment of time and resources.

The Core BTS Learning Solutions team has experienced technology adoption specialists to help you solve this challenge. We can help your organization navigate the technology adoption lifecycle and bridge the gap between technology and productivity.

Contact your Core BTS Learning Representative for more information or to schedule a consultation with one of our technology adoption specialists.

ENGAGE WITH US

[www.corebts.com](http://www.corebts.com) | 1-855-CoreBTS | [info@corebts.com](mailto:info@corebts.com)

**core**  
LEARNING SOLUTIONS

## CORE BTS TERMS AND CONDITIONS

1. **Payment Terms.** Payment is due within thirty (30) days of invoice date. After this time period, interest accrues at the lesser of the maximum rate permitted under applicable law or one and one-half percent (1.5%) per month from the date due until paid.
2. **Independent Contractor; Taxes.** We will perform all services hereunder in our capacity as an independent contractor and not as an employee or agent of you. Our employees shall not be entitled to any privileges or benefits that you may provide to your employees, and we shall be responsible for payment of all unemployment, social security, federal income (state and local income where applicable) and other payroll taxes imposed by any governmental body on us in regard to our employees who are engaged in the performance of the services. Pricing set forth herein is exclusive of applicable sales, use and similar taxes assessed on the performance of any services. You agree to reimburse, indemnify and hold us harmless from and against any such tax, penalty and interest thereon levied against us for the provision of services to you hereunder.
3. **No Hiring.** For the term of the project and for a period of one year thereafter, you agree not to hire, solicit or accept solicitation of, through employment or otherwise, directly or indirectly, any of our employees or independent contractors with whom you have had any contact during the project, unless you obtain our prior written consent. Should you hire an employee or independent contractor of ours through employment or otherwise within this time period without our prior written consent, you will immediately pay as liquidated damages to us an amount equal to the relevant person's then current annual compensation (or the amount paid to or on behalf of the person in the last 12 months, in the case of an independent contractor).
4. **Warranty.**
  - A. We warrant and represent that the services will be performed in a skillful and workmanlike manner according to those standards generally prevailing among consultants performing similar services under similar circumstances. To the extent that we are not the manufacturer of any hardware or software products that you may purchase as a result of or relating to our Services, we do not provide any warranty on such products, whether with respect to their design, performance, functionality or compatibility with your existing system. Any warranty with respect to product must come from the manufacturer, or our product procurement distributor, or we will pass through to you any applicable warranties of the manufacturer, to the extent permissible.
  - B. **EXCEPT FOR THE EXPRESS WARRANTIES STATED IN THIS SECTION, WE DISCLAIM ALL WARRANTIES INCLUDING ALL IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE.**
5. **Our Indemnity.** We will indemnify, defend and hold you harmless from and against any claims, liabilities, losses, expenses or damages (collectively, "Damages") caused by the services performed or the work delivered by us under these terms infringing any copyright, trade secret or any other proprietary right of any third party. Excluded from such indemnification are any claims related to (i) services performed on equipment or software which you covenanted that we had the rights to modify as set forth in Section 7 below, (ii) services performed to your specification or design and (iii) infringement resulting from or caused by your misuse or unauthorized modification of systems or product. We will also indemnify, defend and hold you harmless from and against any Damages resulting from our willful misconduct or negligent acts or omissions in performing the services which are the subject of these terms, except to the extent such Damages are caused by the willful misconduct or negligence of you, your employees or agents. Our obligation to indemnify and defend you with respect to any claim shall be subject to (i) your providing us with prompt notice of such claim, (ii) our having sole control over the defense and settlement thereof, (iii) your providing us with the information and assistance necessary to defend or settle such claim as reasonably requested by us, and (iv) the limitations on liability set forth in Section 6 below.
6. **Limitations of Liability. WE WILL NOT BE LIABLE FOR INCIDENTAL, SPECIAL, PUNITIVE, INDIRECT OR CONSEQUENTIAL DAMAGES, INCLUDING FOR LOSS OF DATA OR ITS USE OR LOST PROFITS OR OTHER ECONOMIC DAMAGES, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.** Your right to recover Damages in aggregate of all claims is limited to the greater of one million dollars (\$1,000,000) or our applicable insurance coverage(s), whichever is greater. You acknowledge that this limitation of liability is part of the consideration and was considered by us in establishing the prices and rates to be charged to you, which, but for this limitation, would have been higher.
7. **Your Covenants.** You covenant that: (i) you have the authority to agree to these terms and the funding necessary to pay for the requested services; (ii) you have title to or license or rights to use or modify any software or products which you have requested us to modify as part of such services; and (iii) you will provide us necessary access to your personnel, appropriate documentation and records and facilities in order for us to timely perform such services.
8. **Requests for Changes.** No change in the services provided hereunder will be performed until we receive a properly issued and executed Change Order; provided, however, that nothing herein will relieve you of the obligation to pay us for services rendered which were requested by you but are not documented in such a properly issued and executed Change Order or within the applicable scope of work.
9. **Confidentiality.** Each party acknowledges that it and its employees or agents may, in the course of the project, be exposed to or acquire information that is proprietary or confidential to the other party. Each party agrees to hold such information in strict confidence and not to discuss or disclose any such information to any third party for a period of three years. The parties acknowledge that the provisions of this paragraph shall not apply to: (a) information which at the time of disclosure is, or without fault of the recipient becomes, generally available; (b) information which either party can show was in its possession at the time of disclosure or was independently developed by it; (c) information received from a third party which had the right to transmit same without violation of any secrecy agreement with the other party; and (d) information which is required to be disclosed pursuant to court order or by law.
10. **Termination of Agreement.** Either party may terminate our engagement at any time upon 30 days prior written notice.
11. **Entire Agreement; Amendment.** These terms and the accompanying engagement letter sets forth the entire understanding of the parties with respect to the subject matter hereof and is binding upon both parties in accordance with its terms and may be amended only by an entry signed by both parties. There are no understandings, representations or agreements other than those set forth herein.
12. **Assignment.** You may not assign any of the rights or obligations hereunder without the prior written consent of Core.
13. **Notices.** Any notice or communication from one party to the other concerning the terms hereof shall be in writing and shall be sent by certified mail, return receipt requested and postage prepaid or by commercial overnight mail to the most recent address that either party has specified in writing to the other.
14. **Governing Law.** These terms shall be governed by and construed in accordance with the laws of the State of **Wisconsin**.
15. **Force Majeure.** Neither party shall be liable to the other for any failures or delays arising out of conditions beyond its reasonable control, including, without limitation, work stoppages, fire, civil disobedience, delays associated with product malfunction or availability, riots, rebellions, storms, electrical failures, delays caused by the other party, and acts of God and similar occurrences.
16. **Waiver; Severability.** Any waiver of any right or default shall be effective only in the instance given and if in writing and signed by the party against whom it is sought to be enforced and shall not operate as or imply a waiver of a similar right or default on any other occasion. If any term or provision hereof should be declared invalid by a court of competent jurisdiction, the remaining terms and provisions hereof shall be unimpaired, and the invalid terms or provisions shall be replaced by such valid terms and provisions as come closest to the intention underlying the invalid term or provision.