



# WSCA Software Value-Added Reseller Offeror Questionnaire Methodology



**Presented by DLT Solutions**



April 15, 2011

This proposal includes data that shall not be disclosed outside the Customer and shall not be duplicated, used, or disclosed - in whole or in part - for any purpose other than to evaluate this proposal. If, however, a contract is awarded to this offeror as a result of - or in connection with - the submission of this data, the Customer shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the Customer's right to use information contained in this data if it is obtained from another source without restriction.

DLT is providing the following responses to the offeror's questionnaire – Methodology on the WSCA Software Value Added Reseller (SVAR) RFP.

## METHODOLOGY

1. Assume you recently received a contract as the sole Software Value-Added Reseller in a State (serving that State and its cooperative partners). Further assume: the State has multiple state agencies and multiple municipalities using that State's contract; the State and cooperative partners have separate volume license agreements and existing perpetual licenses; the State has an existing contract with a personal computer (hardware) provider which provides equipment already loaded with basic distributed software products.
  - DESCRIBE the actions you would take to establish yourself as that State's SVAR, with the central procurement office, and with individual using entities (e.g., a state agency and a coop partner such as a city).
  - DESCRIBE how those actions may be modified if your contract were the first SVAR contract for that State.
  - DESCRIBE your outreach to State and Cooperative Partner users.

Upon notice of award from the WSCA lead state (State of Arizona), DLT will commence post award discussions. During these discussions, the contractual and sales staff of DLT will request points of contact within all of the Participating Entities (PE). This contact list will include all PE purchasing and End User information. DLT requests that it include phone numbers, email addresses, and physical addresses for all PE personnel. The following actions are associating with the marketing launch of this contract award:

- Participate in Post Award Conference
- Launch DLT WSCA Contract website
- Press Release – DLT's marketing department will craft a press release and will seek WSCA approval of the content. Upon approval, DLT will release to the news wires.



Dear Adam,

**DLT Solutions to Co-Sponsor "Best Practices for Achieving Migration to a Cloud Model" Special Report and Webcast**

***Online event with i360Gov.com will feature speakers from NIST and In-Stat***

**Herndon, VA, February 16, 2011** – [DLT Solutions](#), a leading value-added reseller in government [information technology](#) (IT) products and services, today announced that the findings of the special report "Best Practices for Achieving Migration to a Cloud Model" which the company co-sponsored with i360Gov.com, a network of web sites and newsletters designed for government business and technology leaders, will be available to participants of an educational webinar on the topic being held February 23.

[Click here](#) to read more ...

**To register for the webcast, click [here](#).**

**About DLT Solutions**

- Email Blast – Following the Press Release, DLT’s marketing department will develop an HTML email noting the DLT WSCA contract award with pertinent information such as: contract number, website information, product offerings, and contact information.
- Letter – As with the email blast mentioned above, DLT’s marketing department will develop a form letter with the information contained within the email blast.

DLT will identify with the support of the lead state (Arizona) those volume license agreements and existing perpetual licenses for each state and each OEM (Original Equipment Manufacturer). DLT will commence discussions on how to either novate these agreements or move the buying entities to this new vehicle, if that is the desired result of the participating entity. DLT will do a similar effort associated with those existing contracts with HW providers that pre-load software products covered under this SVAR contract.

2. Contractor is required to provide a website for each participating state. Describe the website you would establish for a State and that website’s functionalities or special features. You can supplement this response with illustrative page shots (no more than 10) from one of your existing websites. Please address, at a minimum:
  - Home page appearance and information
  - On line tutorials
  - Product catalog (include searchable fields, which products you would include, how VLA information is provided)
  - Links
  - Downloadable standard reports, if any. Include how information is controlled and sorted (e.g., how can Tempe, AZ obtain only their information, how can Procurement Officer of contract obtain a purchasing profile for users and volume in State).
  - How website is monitored, kept current and accurate

Following the WSCA contract award, DLT will participate in a post award conference wherein DLT will present its initial and baseline website (e-portal) plan. At this conference, DLT will work with WSCA to determine the overall structure and content of the website so that it meets all of WSCA’s requirements.

The following series of screen shots represent DLT’s initial design of the e-portal website per the requirements listed in this solicitation. Each of these pages are schematic representations, and DLT will work with WSCA to make appropriate modifications and adjustments to add necessary functionality and special features.

For online tutorials, DLT will implement an on line training element as part of the overall website implementation as required by contract. The tutorial will include topics such as:

- How to obtain a user login
- Navigation of on line catalog
- How to view reports
- How to submit orders
- DLT points of contacts

For web maintenance, DLT will conduct a quarterly audit of the WSCA e-portal to assure all information is current and functioning.

## WSCA Software Value-Added Reseller Portal Home Page

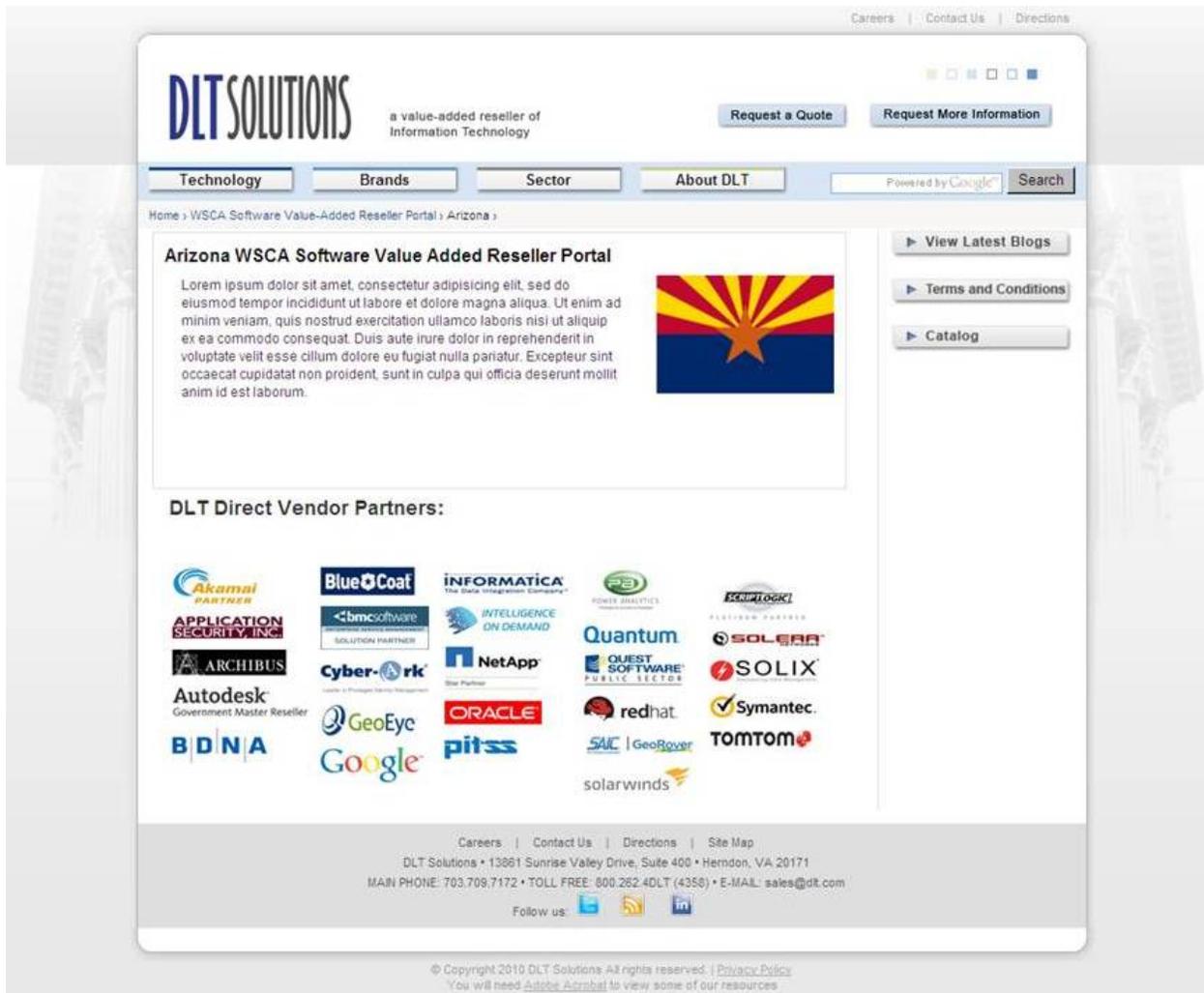
This first screen shot is the WSCA Software Value-Added Reseller Portal Home Page. From the home page, each PE can navigate to their individual state page.



## WSCA Software Valued-Added Reseller Portal State Screen Shot

The following customized PE page represents the PE specific terms and conditions, and requirements. Each PE will have its own unique page, yet all pages will include the following standard functionalities:

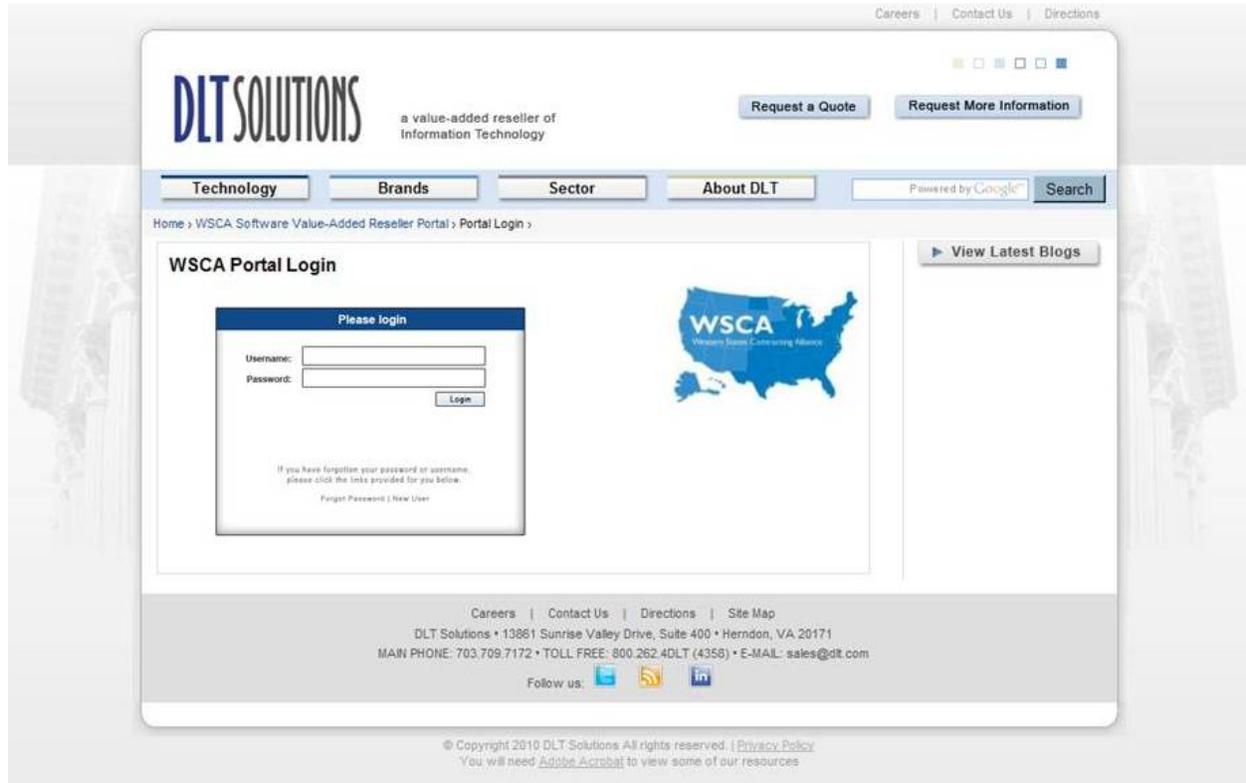
- Pricing Catalog
- State Term and Conditions
- Request for Quotations



## WSCA Portal Login Screen Shot

Each WSCA customer will request a login from DLT. DLT, WSCA, and the PE's will establish policies and procedures associated with login rights and privileges into the e-portal website. Upon obtaining a login, WSCA customers will be able to access the entire DLT WSCA website.

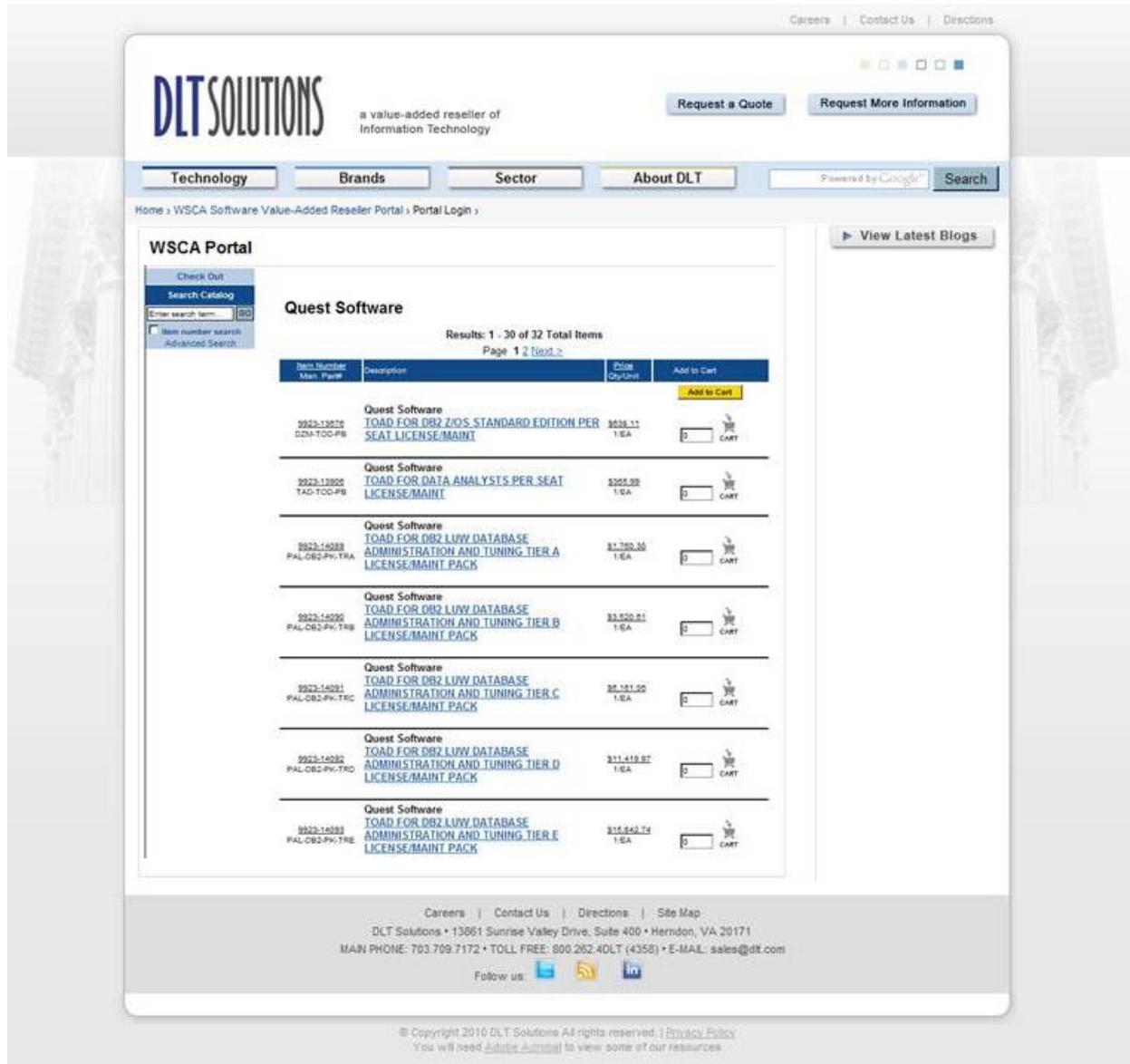
The screen shot below shows the WSCA e-portal login.



## WSCA Portal Catalog Screen Shot

The screen shot below illustrates the DLT pricing catalog capabilities. Each WSCA customer can choose a particular software manufacturer, and see all products offered under the WSCA contract. The product information, SKU number, description, and price are all available. The catalog includes a shopping cart feature. This will allow customers to build a quotation. Once this quotation is finalized, the WSCA customer will submit to a DLT sale representative. Once submitted, the DLT sales representative will follow up within 24 hours.

One of DLT's distinguishing features is the connectivity between pricing and the e-portal website. As new pricing catalogs are updated and imported from our vendors, the website will automatically refresh to ensure WSCA customers have current pricing.

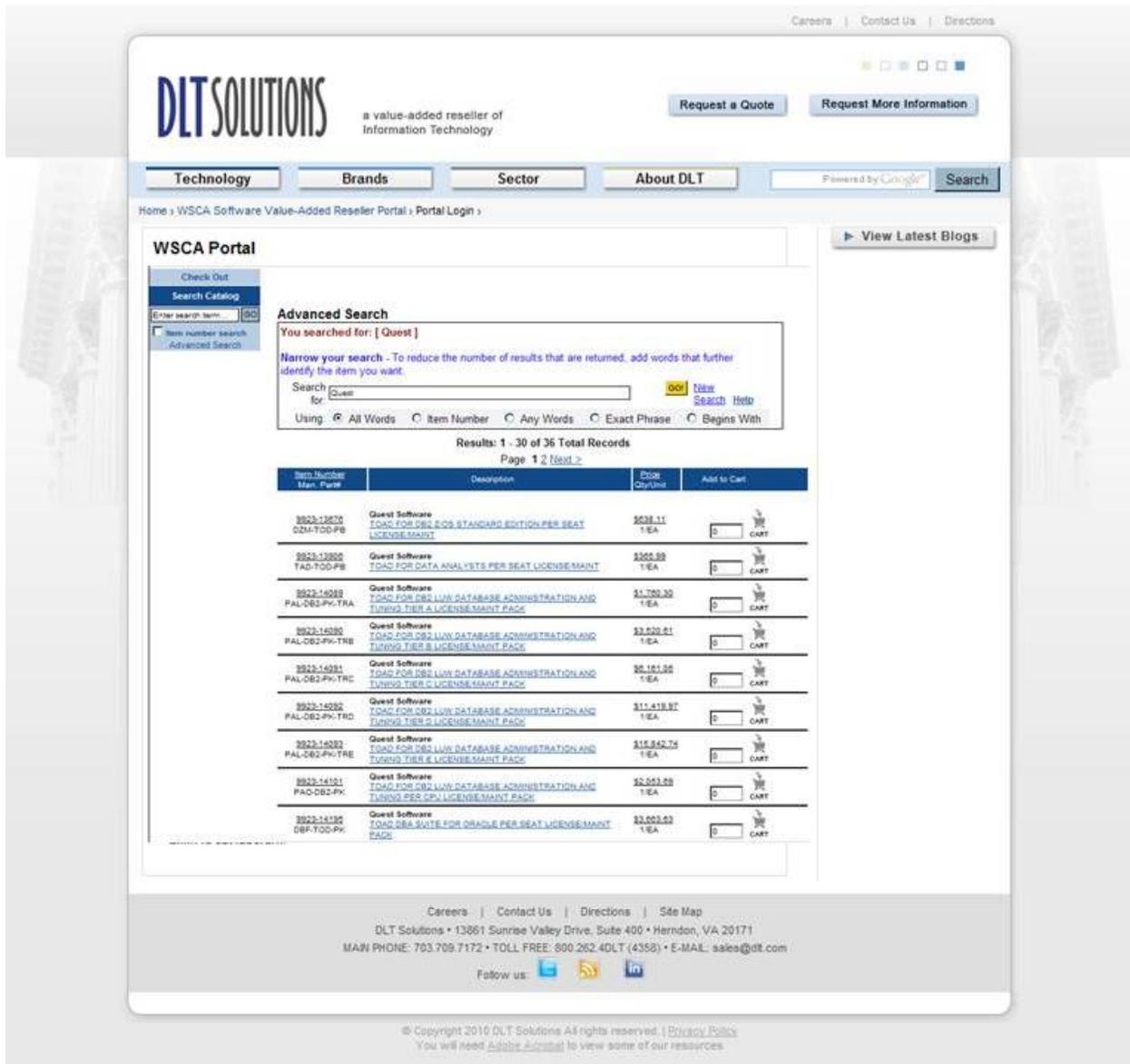


## WSCA Portal Catalog Search Screen Shot

The DLT WSCA e-portal will provide product catalog for all products DLT can sell direct to WSCA customers. The searchable functionality will assist WSCA customers to easily navigate through the catalog. Customer can search based on manufacturer, SKU, and product description.

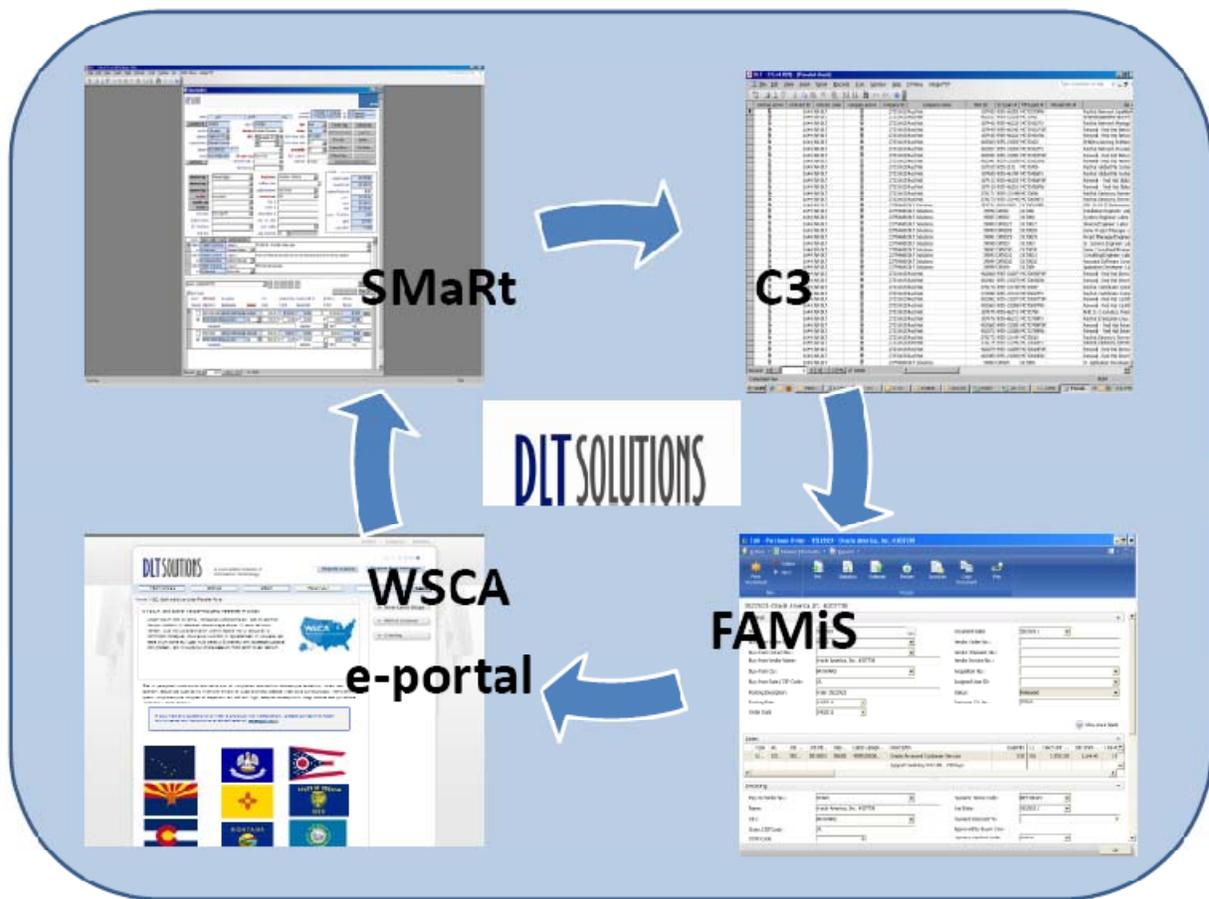
For all non-direct products, DLT will provide links to Ingram Software's pricelist via their VARStreet capabilities.

The screen shot below is a search using Quest as a manufacturer.



3. Describe your method for tracking software licenses and ensuring that Participating Entities (PE) receive timely notifications of renewals or are advised of volume agreements opportunities or vulnerabilities, etc. Please address, at a minimum:
  - The standard sort-able data fields you establish for these records
  - The information you track on behalf of Participating Entities.
  - How reminders of significant dates or volume plateaus are triggered and how your organization, as a partner with a PE, works with the PE to ensure no deadlines are missed or opportunities unexplored.

As previously noted, DLT utilizes a collection of separate and distinct back office Enterprise Resource Planning/ Customer Relation Management (ERP/CRM) systems. These systems include SMaRT, C3, FAMiS and the WSCA e-portal website. The following graphic depicts the relationship between each of these systems.



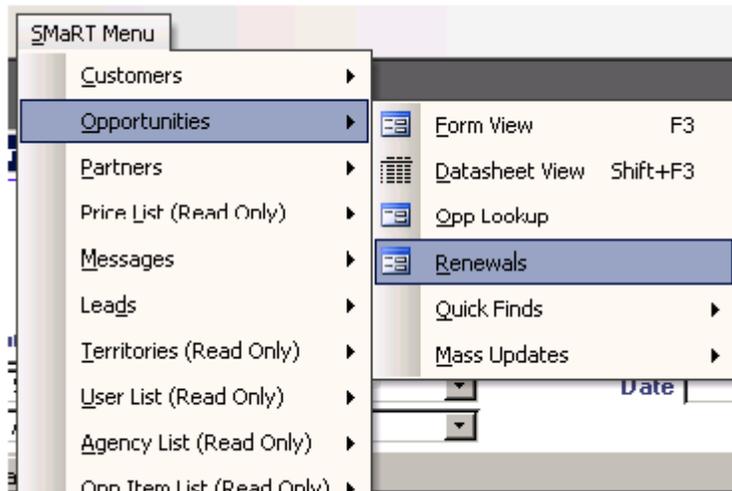
When a vendor price list is updated or received, the pricelist is entered into C3. When entered into C3, price lists are compared against current pricelists, and any outliers are identified, verified, and researched. This process eliminates redundancy and potential pricing miscalculations. This is a built in quality control function within DLT systems.

Once the C3 modification is complete, the price list is published to SMaRT, FAMiS, and the WSCA e-portal.

DLT’s method for tracking renewals includes the following:

- When an opportunity is either won or lost, the line items that are renewable (maintenance or renewals) are stored in a “renewal log”
- The system takes all the pertinent header and line item data (including POP) and stores this as a renewal record
- Renewal “batches” group the renewal records by Sales team, 3-4 months before POP expires, for review and updating by Sales
- Once reviewed, Sales releases the batch in SMaRT (MAStEr Controller process) and the renewal records become regular opportunities
- Reporting is user-defined and can be either monthly or quarterly. Monthly report will always include a rolling 13 months
- Reports can be run by the following:
  - Sales Rep
  - Product group
  - Sector
  - Reseller
  - External Rep
  - Sales Division
  - Manufacturer
- Will need to choose dollars, contract count, or seat count

The following screen shot is from our SMaRT system. Each DLT sales representative has access to this system, and will use it to ensure WSCA renews their software in a timely manner.



The value-add to WSCA and the PE's is the following:

- Allows DLT sales insight into what is available for renewal
- Auto creates renewal opportunities in SMaRT
- Tracks renewed opportunities, and more importantly, opportunities not renewed
- Provides accurate reporting:
  - By various categories, especially by Rep
  - Removes Upsell from renewals
  - Captures Co-terms/Consolidations accurately
  - Uniform reporting across DLT

4. Describe standard reports which you can generate for a PE (other than downloadable reports addressed earlier) and provide sample reports as examples. Describe and provide examples of Optional Reports which you could provide and provide pricing in the Offeror – Pricing attachment.

Downloadable Reports – DLT will provide normal standard reporting covering the following items:

- All purchases under WSCA contract
- All purchases by state under WSCA contract
- Who purchased under WSCA contract
  - What was purchased under WSCA contract
  - How much was purchased under WSCA contract

Should there be any other reports needed for the WSCA contract DLT will develop additional reports.



DLT Solutions LLC  
 FY2011 Q1 Sales Report  
 Contract DE-AB01-07IM00180.A000

**Oct-10**

DOE Ordering Organization	Date of Order	Quote #	DOE Price of Order	GSA Price of Order	List/Retail Price of Order
LANL	10/5/2010	3480056	3,160.00	\$ 3,491.80	\$ 4,108.00
General Atomics	10/7/2010	3468877	6,560.00	\$ 6,848.03	\$ 8,056.50
SRNL	10/12/2010	3429177	6,925.00	\$ 7,240.09	\$ 8,517.75
LANL	10/13/2010	3484370	370,000.00	\$ 456,025.00	\$ 536,500.00
Jefferson Lab	10/19/2010	3445078	91,275.00	\$ 95,428.01	\$ 112,268.25
RL	10/21/2010	3482255	2,530.00	\$ 2,645.12	\$ 3,111.90
Oak Ridge	10/26/2010	3489304	891.42	\$ 931.98	\$ 1,096.45
PNNL	10/27/2010	3432922	102,227.60	\$ 106,878.96	\$ 125,739.95
			<b>\$ 583,559.02</b>	<b>\$ 679,488.98</b>	<b>\$ 799,398.79</b>

**Nov-10**

DOE Ordering Organization	Date of Order	Quote #	DOE Price of Order	GSA Price of Order	List/Retail Price of Order
LBL	11/3/2010	3459394	26,700.00	\$ 38,581.50	\$ 45,390.00
INEL	11/8/2010	3478028	2,300.00	\$ 2,404.65	\$ 2,829.00
KCP	11/22/2010	3487122	3,750.00	\$ 3,920.63	\$ 4,612.50
LBNL	11/22/2010	3495967	275.00	\$ 282.84	\$ 332.75
Oak Ridge	11/23/2010	3480421	152.94	\$ 221.00	\$ 260.00
			<b>\$ 33,177.94</b>	<b>\$ 45,410.61</b>	<b>\$ 53,424.25</b>

**Dec-10**

DOE Ordering Organization	Date of Order	Quote #	DOE Price of Order	GSA Price of Order	List/Retail Price of Order
DOE	12/2/2010	3482257	625.00	\$ 648.13	\$ 782.50
Sandia	12/6/2010	3472110	556,260.50	\$ 756,514.28	\$ 890,016.80
SRNL	12/21/2010	3487932	35,408.00	\$ 41,232.62	\$ 48,508.96
LLNL	12/22/2010	3485631	9,571.00	\$ 9,762.42	\$ 11,485.20
LLNL	12/29/2010	3482254	5,650.00	\$ 5,907.08	\$ 6,949.50
			<b>\$ 607,514.50</b>	<b>\$ 814,064.52</b>	<b>\$ 967,722.96</b>

<b>Total Q1 2010</b>	<b>\$ 1,224,251.46</b>	<b>\$ 1,538,964.10</b>	<b>\$ 1,810,546.00</b>
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- 5 Explain your method of ensuring a PE will receive and can provide proof of licenses. Include in your response:
- Describe how you provide a Proof of License certificate to a buyer. Also, provide sample(s) of a Proof of License such as you would provide.
  - Explain your method of retaining back-up copies of Proofs of License; and how, and how quickly, you could provide duplicate copies as needed.
  - Describe how you partner with a PE to demonstrate accuracy of licensing information to a publisher (e.g., True Up).

The proof of license varies between each software vendor. With each transaction, a Proof of License will be provided directly from the vendor. A purchase order or invoice from DLT will act as another form of Proof of License. – DLT tracks and holds this documentation for all orders transacted.

DLT will receive a quote request from a WSCA customer via the e-portal. Once the quote is created and sent back to the WSCA customer, a corresponding Purchase Order will be sent to DLT. Upon receipt, DLT's Order Management team will process the order in the FAMiS system and provide an order confirmation from the software vendor. The software vendor will provide a shipping packing number to DLT within 24-48 hours.

As soon as the order is processed, all documentation pertaining to that order is uploaded to e-packet and tagged back into the SMaRT system with original quote. E-packet is an internal website that contains resident information on all transaction. This allows DLT to provide any necessary back-up information regarding any transaction during the course of the WSCA contract. All of this information is electronic based; hence DLT can access it immediately. This documentation includes: the Purchase Order, Order Report, and Invoice. As part of this process, DLT receives from the software vendor, a ship order confirmation which includes tracking info, serial number, price, order number, and estimated shipping date.

6. Describe how you work with a PE and publisher to maximize the Entity's value in obtaining products and services under this contract. Description is to address, but is not limited to, the following:
- Working with a PE and a publisher to assist the Entity in best managing their volume or enterprise license agreements.
  - Working with a State and publisher to maximize the leverage created by the total sales volume from a State and its cooperative partners to ensure best value to all PE's.
  - Working with a publisher to maximize the leverage created by the total sales volume overall resulting from this contract.
  - Working with a PE and publisher to obtain the best quote on a high volume purchase.
  - If, and how, you use historical purchase information to provide targeted assistance to a PE.
  - Assuming a software configuration is not within the knowledge or authority of your organization, describe how you could assist a PE in finding a solution (i.e., helping PE obtain needed configuration assistance from the publisher or designee.) Explain how you would 'price out' such assistance.
  - Explain the training you could provide (other than online tutorials) to assist PE's in using this contract and obtaining best value from it.

With a unique business model of deep relationships with the premier software manufacturers, DLT is able to maximize WSCA and its PE's buying capacity. DLT is simply not an order taker, we are a Value-Added Reseller. Opposed to standard resellers, DLT attempts with every order to assist end users with true configuration and an assessment of whether the technology truly fits their needs.

For WSCA customers with significant install bases and potential large purchases, DLT will work with the customers to conduct a needs assessment. In this assessment, DLT and the WSCA customer will evaluate the short term and long term needs associated with each technology product. DLT will work to right-size the customer's portfolio. This process will include a data-call to establish a software baseline. Once this baseline is verified and analyzed, DLT can work with the WSCA customer and the software vendor to create a tailored portfolio that yields cost savings and high product usage.

For large, strategic purchase, DLT will work with the WSCA customers to establish their baseline and fully understand future software needs. With a baseline and future requirements established, DLT can work with the customer to obtain the appropriate funding. This information will allow DLT to fully assist the WSCA customer in negotiations with the particular software provider. The internal DLT systems can assist in providing the back-up documentation to support negotiations. Documentation such as previous orders, previous quotations, previous discounts, license counts, and contact information. Finally, DLT recognizes the importance of each software vendor's quarter and year end close as the WSCA customer's ability to ensure contract award by those end dates may improve percentage discounts.

All of these efforts will be documented through DLT's ERP/CRM systems and as such, and for training purposes, DLT will provide these best practices, and case studies on its e-portal website.

7. This contract has a maximum life of five (5) years, the technology field is a fast evolving one, and the potential volume under this contract is beyond any single entity contract.
- How would you improve the value of this partnership, over time, during the life of the contract?
  - We require the successful contractor(s) to retain publisher certification levels, to improve upon them, to work to reduce their costs to obtain publisher products, etc. Explain your processes to meet these requirements.
  - How would you partner with the Procurement Officer and Participating States to adapt to changes and keep the contract viable?
  - As this is a contract which is expected to be used by many states, there is potential for a level of value and partnership – considering market information, volume, extended relationships with publishers, shared standards, etc. – beyond that provided by a single State or PE contract. What extra services or value do you feel you could provide given this expanded user and volume base?

DLT to maintain adequate number of sales and technical certifications necessary to support the federal business and deliver technical support, quoting, and configuration capabilities to the registered partners. DLT recognizes that technology is constantly changing, and as such technical refreshes are extremely important to DLT's business model. DLT's sales representatives are continually educated in their products new releases and technology improvements.

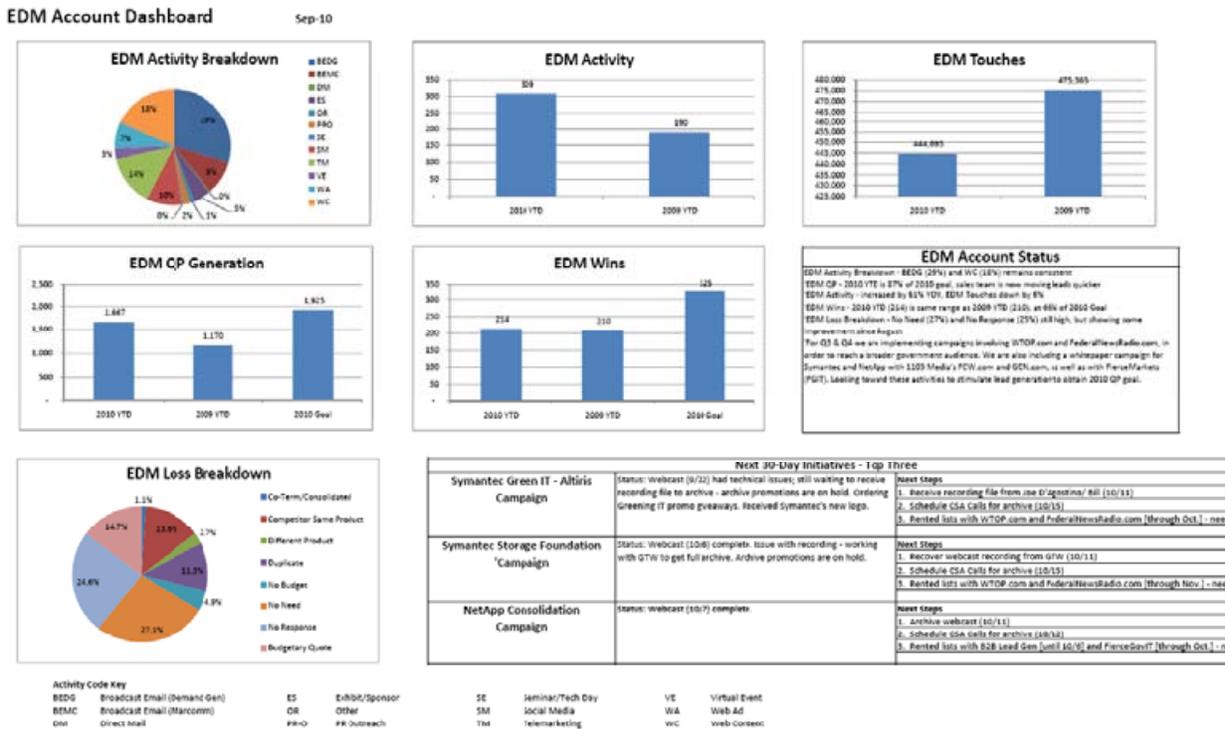
As part of our goal of educating our customers and prospects, DLT has seen demonstrated success in the development of educational and informational-based content. From our own industry blogs (see examples at [www.acronymonline.org](http://www.acronymonline.org) and [blogs.dlt.com](http://blogs.dlt.com)) to guest blogs on public sector community sites such as GovLoop, we are pioneering the use of online media and content to demonstrate how technology and services are and can address the challenges of modern government.

In addition to our blog insights, DLT has also developed custom publications such as the well-known “For Dummies” co-branded guides (including the “Virtualization for Government Guide for Dummies”); industry magazines such as our digital design user publication – “Acronym Magazine” – now in its fifth year; as well as other custom print and electronic publications that we leverage to build a community of interest and engagement around DLT’s partner offerings.

DLT will bring all of these resources to bear on the WSCA contract.

- What performance measures would you establish to ensure yourself and users of this contract that you are, at a minimum, meeting the requirements of this contract, providing cost-savings solutions, and realizing a high level of customer satisfaction. Describe your methods of defining and tracking your performance against specific measurable objectives. Provide copies of any reports you may have developed that communicate your performance levels to customers.

DLT utilizes numerous metrics to measure our performance. These tools include marketing dashboard with information such as lead generation activities, sales metrics number of calls, conversations, pipeline, etc. See an example below. In area of professional support, DLT provides reporting of call queue answer time, case closure rate, case closure time, customer satisfaction rating.



9. We have requested information about optional reports (Question #4), about functions you could serve to assist in more complicated configurations (Question #6), and in providing extra value possible given the potential magnitude of this solicitation (Question #7). Please use this item as an opportunity to describe other value-added services you can provide that were not specifically required in this solicitation, but are consistent with its intent. Please advise the cost for the services you describe in the Offeror – Pricing attachment, or advise if they are included at no additional cost.

DLT offers to WSCA customers a full complement of corporate services, not typically associated with a reseller. These include a mature Business Development department, Marketing organization, and competent program management. These capabilities will be at the disposal of all WSCA customers, at no cost.

Another discriminator of DLT is its organic professional services team, which supports the following software vendors: Symantec, NetApp, Quantum, and Red Hat. These in house technical capabilities can augment and support sales team to ensure proper software configuration and validation requirements. DLT is the only authorized Symantec Technical Support Partner Program (TSPP) entity to support the public sector via a 24x7 call center. Under this program, DLT has a historical rate of 99.5% case closure rate. The significance of this success gives DLT greater discounts based upon the high rate of closure. For WSCA, this translates to a lower cost.

Finally, DLT is a corporate member of the National Association of State Chief Information Officers (NASCIO) and participates in seminars, panels, conferences, market analysis research projects, and will share this information with WSCA PEs at no charge through our CTO.