
Offeror Questionnaire – 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.

Zones would approach each state awarded as if this were the first SVAR contract for that state. Although a state may have an existing agreement, there may be a range of entities which are not familiar with or not utilizing existing programs. Our fresh-take approach would provide an opportunity reach out and try to involve all entities beyond those currently utilizing the state SVAR contract.

1. Zones will contact the principles at the state's central procurement office and update them on the outcome of the RFP. We will also ensure we have an updated list of all the state agencies and coop partners and brief them on our plan for implementing the WSCA contract.
2. Zones will design an electronic marketing program, while keeping within state guidelines, and send information on the new WSCA contract to all contacts. These e-mails would list our contact information along with how to learn more about the contract including:
 - a. Links to information posted on their state specific website
 - b. Links to webinars we will put together explaining the contract, how it works, how to get a quote and make a purchase.
 - c. Dates for local sessions we would establish for in-person training, instruction and Q&A.
3. Zones will follow up with a call campaign to ensure that all agencies and cities are aware of the contract offerings and know how to get any additional instruction and questions answered.
4. Zones will also post copies of the contract and training materials on each entity's WSCA specific website.
5. Zones will set up local training sessions in strategic locations throughout the state and advertise those dates to all agencies and partners

6. Since Zones already does business with several hundred state & local agencies, we will also utilize a targeted campaign to present the WSCA contract to these clients as an additional contract that is now available for them to use.

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:

Zones will utilize a portfolio of secure, client-specific web-based procurement tools called ZonesConnect. Designed by supply chain management and IT professionals, ZonesConnect has the ability to meet each of WSCA's requirements for real-time, automated, on-line ordering, procurement and customized reporting systems. WSCA PEs will regularly access and utilize ZonesConnect through any standard web browser as a means of placing and tracking orders and obtaining extensive information about their product standards, availability, pricing and SLA performance. This site will have a clear architecture which allows PEs to enter at the main WSCA page and then drill-down to their own catalog via sub-sites dedicated to each state and type of entity within that state. Each of these pages will be fully customizable to provide training, branding, special information and contact information relevant to that state or entity type.

Zones certified procurement specialists will consult with WSCA PEs to develop product standards and processes to meet virtually any client request. Designated PE personnel are supplied with unique administration rights to create and modify product bundles directly within the ZonesConnect system. As the PE's internal policies require, Zones provides a means of restricting order access and ordering capability. The ordering feature can also be restricted for each user based on each client's access and usage policies.

ZonesConnect allows you to:

- Track purchasing information using custom data fields
- Ensure policy compliance with a multilevel approval process
- Generate custom reports and distribute them by e-mail
- Check order status and request quotes
- Submit return material authorizations requests (RMA) online
- Use built-in efficiencies for frequent purchases
- View client supplied inventory at Zones integration facilities
- Manage your software licenses with Zones License Tracker
- Enjoy convenient 24x7 access to your account
- Access more than 150,000 products available from Zones
- Control user access with a secure, password-protected entryway
- Get expert assistance from your Zones account executive
- Manage assets online

**ZonesConnect
integrates
into the
most popular
e-commerce
portals!**

With a click of the mouse, authorized end-users can research product information quickly and add it to a shopping cart to create customized quotes and orders. To streamline the internal approval process, the order is routed to a purchasing agent for budget approval/verification or can be sent directly to Zones for fulfillment and delivery. Once an order is received, the dedicated Zones sales

manager e-mails confirmation of order receipt to the appropriate client contact. This option minimizes paperwork and simplifies the procurement process.

Efficient Approval Process

Whenever an order is placed through ZonesConnect, an e-mail is automatically sent to the individual who is authorized to approve orders. The e-mail includes a link to the Purchase Management section of ZonesConnect. The approver simply clicks on the Purchase Management link to begin reviewing orders.

The first screen of Purchase Management specifies who placed the order, the order date, the order number, the PO number and the order amount. This initial screen also features “approve” and “reject” buttons for fast and easy order processing. While in Purchase Management, the approver may view order details, make order changes and approve or disapprove orders. As soon as the order decision is made, an e-mail notification is sent back to the originator of the order.

For greater efficiency, approval levels can be established for employees designating maximum order amounts. For example, an employee may be allowed to spend up to \$100 before approval is required. When the employee places an order for \$50, the order will automatically be placed. If the same employee places an order for any amount greater than \$100, the order will be processed through Purchase Management.

View and Change Order Details

To view the order, the approver clicks on the order number that appears on the first screen of Purchase Management. The approver now has complete control over the order and can make any necessary changes. For example, the approver may change the shipping address, adjust the shipping method, change the quantity of product(s) or alter the payment method(s).

Complete the Order

When the approver has finished reviewing the order, it can be updated and approved. If the decision is to cancel the order, a comment box is available to explain why the order is being denied. Once the order is approved or cancelled, the originator is sent a notification e-mail.

ZonesConnect Advantage

The ZonesConnect Purchase Management approval process can help ensure standards are met and track how budget dollars are being spent. Automating the purchasing process can also increase employee productivity by freeing up time for more important tasks. Orders will be placed by the fastest means possible through a secure online ZonesConnect account, so entities experience timely and dependable delivery of their products.

• Home page appearance and information

Zones’ website would start with the WSCA landing page and links to each individual state. Each state page will subsequently contain links based on entity type (local, state or education) and those pages will, in turn, have links to each participating entity’s individual catalog.

The information on WSCA’s home page is fully customizable and we will work with you to develop the content. This can include an introduction to the site, contact information for key Zones and

WSCA resources, a PowerPoint or video training session on how to utilize the site and any additional direction you wish to provide end users.

• On line tutorials

Zones will produce a training video or walkthrough video for WSCA participating entities and include this on the website for them to use as a training tool. We also have our ZonesConnect Champions available for customer walkthroughs. Should on-site training be needed, we would welcome the opportunity to discuss how that service could be delivered, either by training a customer resource or supplying the resource directly. There would be an additional cost should Zones resources be required on-site.

• Product catalog (include searchable fields, which products you would include, how VLA information is provided)

Each WSCA PE will have a customized catalog featuring all of the approved software products at the approved contract prices. This will include a powerful search capability which will allow end users to search for keywords and sort results based on best match, manufacturer name, part number and price. After the search is run, end users will also have the ability to refine their results by type of software (business, OS, personal software, etc.), by price range (\$0-1000, \$1000-2000, etc.) and by manufacturer and eliminate items which are out of stock.

Once a product is selected, the end user will be directed to a product page which includes a narrative description of the product, key features and benefits, system requirements and specifications. There will be links to related products and buttons to add the item to a shopping list or to e-mail the product link with a message to another end user. PE users will also have the option to set up alerts on the products so that an automated e-mail is generated when the product is back in stock or when the user's target price for the item is reached.

VLA information is uploaded by Zones and updated automatically when price changes occur, as new products are launched or as products are discontinued. These updates are performed in real-time every hour to ensure PE end users see the most up-to-date selection of products and pricing.

• Links

The main WSCA page will have links to each individual state in which Zones is authorized to sell. Each state will have links for different entity types and, from there, links to individual entity sites. Zones' site will provide a range of links including:

- Links to online training which we will produce to cover the user of the site and use of the contract.
- Links to shipping partner web sites to track delivery progress of any boxed software or shipped media.
- The ability to e-mail product links, reporting links and order status links to other users
- Links to other useful information including advanced Zones solutions, technology briefs, glossaries of terms, specials and more

Our e-commerce experts will work directly with WSCA and any participating entities to customize the site further with links which would enhance ease of use and site performance.

• 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).

ZonesConnect makes a wide variety of reports available to WSCA PEs. These custom reports help track purchasing activity, spending levels, freight costs and more. Zones provides PEs the ability to leverage ZonesConnect by taking advantage of automated reporting subscriptions in addition to real-time customized ad hoc report submissions. With ZonesConnect reporting tools, PEs can access detailed reporting history within minutes of requesting.

The ability to access information is tied to each end user's individual username and we will set permissions for each user to restrict access to only authorized information. For example, some Tempe end users who have no reason to view reporting can be restricted from viewing any data. Tempe stakeholders can be restricted to only the data involving their organization, while overall WSCA contract administrators can be given permissions to access all information from a given state or all information from all states.

ZonesConnect integrated reporting tools provide access into the following search criteria.

Accounts Payable – This data can assist PEs with reconciling open invoices.

Asset Management – Asset management data can be used to load an asset management system or a fixed asset accounting system or to analyze purchasing for a specific manufacturer's item or model.

Vendor/Part number – PEs can create specific reporting formats to analyze spend or performance data by vendor, product category or part number.

Invoice History – Data accessible through this link can be used to analyze purchasing activities and measure compliance with service-level agreements (SLAs).

Order Tracking – This data can be loaded into a client order-tracking system or can be used to measure compliance with SLAs and manage product installation schedules more accurately.

Serial Number – Serial number tracking and reporting allows Zones and PEs to identify individual products and shipments.

Original Order – PEs can utilize this to analyze the original order placed and any authorized substitutions.

Product Catalog – Data from the product catalog can be loaded into WSCA's procurement system. This feature enables PEs to request catalog-related reports based on items within their catalog. Catalogs can be modified real-time to add or remove products based on client direction.

Shipment Tracking – From this link, users track shipping, measure compliance with SLAs and maintain leasing schedules.

Software License Management – Zones License Tracker can be used to document compliance with software licensing requirements in addition to being an effective means of determining actual license utilization and reclamation. Zones License Tracker can also be an effective tool for negotiations with software publishers for true-ups and renewals of existing agreements.

ZonesConnect report data is output as a text file or Microsoft standard formats which can then be imported into various applications including Excel, Access and Lotus.

- How website is monitored, kept current and accurate

Pricing on the participating entity's site will be automatically populated from publisher special bids and pricing lists. Each entity will have an automated volume pricing index which applies the appropriate margin to publisher cost to generate an accurate cost to the user. Each catalog is updated on a nightly basis to ensure that the pricing is up-to-date and accurate. The level of automation in this process also eliminates the opportunity for human error and increases the level of accuracy.

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:

Zones Connect helps you automate your purchasing, but it can also help you facilitate the management of the software license agreements you purchase from Zones and other software providers. Zones License Tracker is a central database for all your software licensing information. The Zones License Tracker homepage grants you immediate access to recent licensing program news, a quick three-month report of any expiring licenses, reporting options and more.

Software License Management

Zones License Tracker automatically contains information about software licenses purchased through Zones, but it can also include licenses purchased elsewhere. To enter a single license, simply click on the data entry section and fill out the online form. To add multiple licenses, an upload can be performed using our pre-formatted Microsoft Excel® document that is available for download.

90-Day License Renewal Notice

The License Tracker homepage contains a quick button that displays a list of licenses set to expire over the next three months. The information is presented in a calendar format with expiration dates highlighted in blue. Click on any of the highlighted dates and a new window displays detailed information about the expiring license(s).

Custom Reports

Zones License Tracker reports provide critical information to ensure timely renewals and to help with software management. The report will include information on all licenses in the database based on the criteria selected. A Licensing Connect report can be set up to automatically run on a regular basis.

Licensing Newsletter

The Zones Software Licensing Newsletter is issued twice a month and features current promotions, licensing updates and licensing program news. The newsletter is available for download or you can sign up to receive the newsletter via e-mail.

Zones Advantage

Zones License Tracker enables PEs to track the licenses they purchase from Zones and elsewhere in a single, centralized database. The data in the reports are presented in an easy-to-read format to help keep on top of license expiration dates. This single tool will help get the most cost-effective software solutions, reduce the time and resources required to track PE's license agreements and ensure software compliance.

• The standard sort-able data fields you establish for these records

Zones' License Tracker includes the following 29 sortable data fields in standard reports:

- Agreement Expiration Date
- Agreement Issued Date
- Agreement Number
- Agreement Start Date
- Agreement Type
- Authorization Number
- Comments
- Customer Number
- Item Description
- Item Number
- Item Operating System
- Item Quantity
- Item Serial Number
- License Level
- License Pool
- Mfr. Customer Number
- Mfr. Name
- Mfr. Order Number
- Order Date
- Order Number
- Order Ship Date
- Order Type
- PO Number
- Product Family
- Product Points
- Product Version
- Program Name
- Purchaser
- Ship-to

- The information you track on behalf of Participating Entities.

A major differentiator for Zones is our ability to provide customized tracking for our clients. In addition to the 29 sortable data fields in License Tracker, we offer customer-defined fields which allow users to track information unique to that entity. We also have the ability to add additional fields as necessary to allow for further customization for each entity.

- 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.

Zones will propose a regular report to be sent to PEs at the end of the first month of each quarter. This report will highlight significant dates in the following quarter. For example, on January 31st, the PE will receive a report of all significant expirations, renewals, etc. occurring between April 1 and June 30. This will ensure at least 60 days of notice for all significant milestones.

- 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.

In addition to those reports mentioned above, Zones also provides graphs which show the top 10 licensing manufacturers purchased, the top 20 licensing products purchased and the percentage of license versus boxed product purchased. These will simplify the analysis for PEs and WSCA by providing simple representations of where the bulk of your software spend is going.

Zones also provides Connect Reports with the option for customer-defined fields, which may be used by PEs or WSCA to track additional entity-specific information which is not automatically captured in ZonesConnect. These reports can also include information on the approver (including order comments), for clients who choose to implement a purchase management solution.

A major differentiator for Zones is our ability to provide customized reporting for each of the WSCA PEs upon request. Our processes and extensive internal team resources allow us to provide most customized ad-hoc reporting requests within 48 hours. Pricing for reporting requests which fall outside of those which can be performed via ZonesConnect is included in our pricing attachment.

- 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.

All of our purchase orders contain instructions for the publisher to furnish license certificates directly to the end user, referencing the customer's purchase order number, with a copy sent to Zones. If Zones receives a Proof of License for a product, the purchasing team will send it to the appropriate Account Executive or ISR, who will provide it to the customer. There are some publishers and product lines for which Zones does not receive the Proof of License. It is sent directly to the customer instead. We have attached examples of proofs of license.

- Explain your method of retaining back-up copies of Proofs of License; and how, and how quickly, you could provide duplicate copies as needed.

If Zones receives a Proof of License for a product, we will maintain a copy of it on our network. These would be easily retrieved if a duplicate copy is requested. If it is a product for which Zones does not receive a copy of the Proof of License, we will request a duplicate copy on the customer's behalf, but the response time varies by vendor and publisher. Typically a copy will be provided within 3-5 days.

- Describe how you partner with a PE to demonstrate accuracy of licensing information to a publisher (e.g., True Up).

Zones works as a proactive partner with the PE. We have knowledge of each major publisher's requirements for accuracy and how to provide a satisfactory response. For example, if an entity has a Microsoft EA, we will work the T-36 process with the entity which ensures we are helping with every step of their EA. Part of this process includes working with the entity on their software asset management processes to ensure they are always compliant and helping them with the true-up process. The T-36 process is a three-year program which includes:

Year One

- Software Assurance Benefits or Maintenance Optimization through Quarterly Reviews
- Deployment Services and Program Maximization
- Contract Management
- Baseline discovery & Reconciliation Reporting for True-Up

Year Two

- Quarterly Maintenance or Benefit Review
- Software Optimization & Reconciliation Reporting for True Ups/Renewal

Year Three

- Software Optimization & Reconciliation Reporting for True Up
- Renewal Negotiation Support
- Roadmaps, Financial Analysis, & Benchmarking

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.

Contract Processing

Zones is the proud multi-year recipient of Microsoft's Operational Excellence Award. The award, bestowed only on Microsoft partners who maintain an annual contract process accuracy rate of 95% or higher, demonstrates Zones' core strength of software contract management, and is further evidence of our commitment to manage our clients' software contracts with the highest level of accuracy and timeliness available in the industry.

Contract Management System

Given the sheer number of publisher programs we support combined with each program's respective complexities, Zones implemented a custom built Contract Management System. This automated system, which includes a centralized repository to house client agreement details, subsequently streamlined our entire contract process. In addition, essential contract information, such as scanned images of contractual pricing agreements, contract amendments, etc. is now at the fingertips of our inside software support and operations teams, which ultimately drives more efficient order fulfillment and improved order accuracy as well.

On-Going Contract Administration

- Software Assurance benefits calculation and explanation. Zones has created and maintains a practice that ensures our clients maximize the opportunity and value related to Software Assurance. We will work with you on a continual basis to achieve optimum pricing and return on investment. (Cindy to locate additional details)
- Proactive notifications of licensing changes, program changes, price change alerts. Your dedicated Zones team keeps you updated on changes to your software agreements and on the products you use.
- Remote client support. We recognize that your remote purchasing teams may need help from time-to-time understanding the terms of your Licensing Agreements, maintaining software standards, and comprehending other items related to daily management of your software assets. We can assist you in developing and implementing a method to support your remote employees on a day-to-day basis.
- License compliance. Zones software specialists take the lead by actively tracking and reporting on WSCA's software license agreements. As part of this license management service, Zones monitors your license purchases to be sure you are within compliance of your contracted commitment levels.

Software Audit Support

Should your organization need assistance during a software audit, Zones is prepared to support you through it. We can provide documentation of your organization's purchase history, invoice history, and other information necessary to help you achieve a positive outcome. In addition, Zones can work directly with the software publisher on your behalf to ensure compliancy is achieved.

- 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.

Zones will make recommendations for terms and conditions and pricing to make sure your volume licensing agreements are beneficial and offer savings at renewal times. For tier 3 publisher spend, Zones offers a letter of agency (LOA). This will allow us to negotiate with publishers directly on your behalf. Zones can serve to improve productivity in your procurement department by reducing the total number of IT suppliers managed by WSCA PEs.

- Working with a publisher to maximize the leverage created by the total sales volume overall resulting from this contract.

Zones will proactively conduct regular pricing negotiations on behalf of WSCA to leverage the overall spend resulting from this contract. Financial analyses will also be performed to determine all opportunities for leveraging WSCA's buying power during vendor negotiations.

- Working with a PE and publisher to obtain the best quote on a high volume purchase.

In addition to the quarterly contractual negotiations, all large opportunities (quotes or orders) greater than \$20K are processed through our bid desk and will be shopped for best pricing. All opportunities greater than \$100K will be reviewed by the Vice President of Purchasing to ensure best pricing is obtained. The bid desk will work hand in hand with our internal software operations team, product management team, suppliers and publishers to ensure the best program level discounts are attained based on WSCA's qualifications.

- If, and how, you use historical purchase information to provide targeted assistance to a PE.

As one of the largest resellers of software in the industry, Zones has access to vital market intelligence. Depending on the particulars of each organization's needs, we can utilize historical purchase information to provide benchmarking assistance to PEs with regard to programs and pricing. We will compare their past spend to other similar public entities and see what additional discounts, improved terms or other considerations should be available. We will then utilize this information in our negotiations with software publishers to ensure each PE is receiving the best possible pricing in an agreement with suits their organization's unique requirements.

- 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.

Zones will work as a liaison between the PE and the publisher involved to find a solution. We employ on-site vendor representatives from most tier-one and tier-two software publishers who will become involved to facilitate the delivery of software which we may have limited experience with. We also maintain strong relationships with a wide range of distribution partners and we would work with their licensing experts on the PE's behalf to ensure delivery within their specified budget. Costs for this service would depend upon the specifics of the engagement, but in most cases it would be provided at no cost to the WSCA PE.

- Explain the training you could provide (other than online tutorials) to assist PE's in using this contract and obtaining best value from it.

Zones will host regional training sessions for participating entities within the states we are awarded. We currently host similar sessions nationwide for major corporations. For example, if awarded the State of Washington contract, we would anticipate holding trainings in the Seattle, Olympia and Spokane areas to provide convenient access for all participating entities. This training would cover how to use the contract, the associated e-procurement portal and some of the software licensing trends which will most likely impact their organization. We would also tape this training and post it on WSCA's ZonesConnect portal so that all participating entities can view it.

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?

Zones provides a range of customized software optimization services including:

- Providing a consolidated license history and SCCM reports from a list of pre-determined software vendors
- Complete reporting of software purchased through multiple channels
- Centralized portal of purchase history broken out by tab and summarized
- Maintenance renewal reporting by quarter
- A range of potential cost savings opportunities resulting from our optimization methodology including:
 - Recognizing possible over or under licensing scenarios
 - Reducing risk of non-compliance by helping to recognize discrepancies between vendor's purchase histories and your own
 - Maintenance renewal analysis and recommendations
 - Recognizing and recommending possible cost savings via bulk purchasing, moving to volume license agreement where possible, co-termination or cancellation of licenses.

- 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.

Zones' Product and Partner Management (PPM) Group supports the relationships we hold with over 2,000 OEMs and software publishers. One of the primary focuses of this team is retaining, adding and improving certification levels with publishers. This team includes on-site experts dedicated to specific manufacturers and category managers who oversee all manufacturers within a specific product type. Our team members are trained in specific technology categories and focused on product knowledge and availability. Others within the PPM team are specialized in developing direct, influential relationships with major hardware manufacturers and software publishers. They will bring valuable product insight and emerging technology news to WSCA entities.

Zones maintains on-site OEM solution specialists to provide support to our customers and sales staff. The solution specialists represent a specific publisher and specialize in all manufacturer products and programs to ensure that the agreed-upon goals between the publisher and Zones are met. The primary measurement metrics for each solution specialist are:

- Continued revenue growth for each represented manufacturer (quarterly goals).
- Hitting key growth and activity targets as set by Zones and the manufacturers.
- Maintaining a 2-hour response SLA; 48-hour resolution on special pricing.

The solution specialists' charter to each Account Executive at Zones includes, but is not limited to, the following:

- Be the product and program expert within Zones, including driving key product and technology solutions as designated by the category manager.
- Train the account executives on how to sell and position the publisher's products, including usage of key tools and configurators.
- Train and assist account executives to build an accurate order or quote for the products.
- Initiate publisher field sales engagement between the account executives and our customers.
- Apply for deal-specific costing for each eligible program.
- Keep each account executive apprised of up-to-date product and program information.
- Track all sales opportunities for Zones and manufacturer funnel reports.
- Inform, track, and assist in renewal sales opportunities when they exist.
- Initiate and conduct customer, publisher, and account executive engagements such as conference calls, onsite visits, and customer events.
- Provide assistance for conflict resolution between the publisher and the customer.

Part of maintaining certification levels is maintaining certain mandated levels of certified personnel. Zones runs a program which enables our account executives and support personnel to further their education by providing a monthly certification focus and lab. The labs are sponsored by our partner manufacturers and assist the account executives in gaining special designation of VMware Sales Specialist (VSP), Symantec Sales Expert (SSE), Cisco (CSE), and more.

- 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?

Zones would offer our software asset management services to entities. These services would help drive down the cost of procurement and reduce the amount of work that needs to be done by the entity to stay on top of their software licensing. Tasks performed associated with these services could include:

- Introducing and facilitating the relationship between the entity and a SAM tool provider, if the client does not have an electronic inventory or discovery tool.
- Monitoring the collection of inventory data.
- Compiling the License Gap Analysis each quarter.
- Comparing current practices to one or more recognized standard.
- Authoring a report to management findings and recommendations in accordance with standard.
- Comparing the inventory to license entitlements.
- Reconciling software installations to license entitlements.
- Applying license terms & conditions to the entity's environment and usage patterns.
- Analyzing and applying upgrades, downgrade rights and software maintenance agreements.
- Applying, where possible, license surpluses to shortages.
- Summarizing the findings of the license reconciliation.
- Attending on-site meetings with the entity to collect information.
- Interviewing key entity management with respect to its baseline SAM initiative.
- Reviewing the entity's policy and procedures related to SAM.
- Reviewing best practices related to SAM.
- Comparing current practices to one or more recognized standard.
- Authoring the report to management with findings and recommendations.
- Drafting and finalizing License Gap Analysis and SAM Optimization Model reports.

The deliverables provided from this service will include:

- Ongoing communications with publisher's representatives and compliance team regarding progress.
- License Gap Analysis Report (sample attached)
- SAM Optimization Model Analysis Report

8. 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.

Zones utilizes an SLA scorecard and management report to document the key measures of our performance. These documents will be customized to the specific requirements of WSCA and its PEs and will include reports on costs savings realized either through price negotiation or other process-driven means. A sample scorecard is attached.

In addition, we will also perform regular surveys via e-mail utilizing online tools such as Survey Monkey. This survey will be sent to decision makers and end users monthly across all entities. Results will be obtained through web collection and results will be scored on a scale and published for Zones' management for review. Comments and ratings are reviewed by managers with the designated account executive. End users that have voiced concerns through comments about services and/or products are considered critical follow-ups and are addressed immediately. Issues that may arise are escalated and a solution is found for the customer.

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.

Software Asset Management Assessments

Best Practices SAM Consulting

In addition to helping you negotiate, manage, track and report on your software agreements, Zones Licensing Executives can work with you to establish a best-practice software license management (SAM) program. A formalized SAM program helps you:

- Reclaim unused software licenses
- Eliminate unnecessary purchases
- Use license data for agreement negotiations
- Improve management practices
- Detailed license overview that serves as the basis for migration planning
- Maintain compliance to avoid the risk of fines
- Simplify budgeting with pinpoint forecasting

Software Asset Management (SAM) Planning

Zones works with many clients similar to WSCA participating entities to assist in building a comprehensive strategy for software asset management. Implementing a disciplined approach to SAM is essential in eliminating overspend and compliance penalties. Our Certified Software Asset Managers are available to take you through our formalized SAM methodology and can help you setup a program that works best for your organization. An overview of our methodology includes:

1. Enterprise Review
2. Software Reconciliation
3. Contract Negotiation Planning
4. Software Tracking & Reporting
5. Management & Compliance Planning

License Inventory Tool

To establish an automated baseline of company-owned and deployed software, Zones partners with Scalable Software, Ltd. to utilize their IT Asset Lifecycle Management Tool, Survey. Survey is a tool which systemically identifies unused and under-utilized hardware and software assets. The primary difference between Survey and other solutions is the way Survey tracks usage. With Survey, you see who is actually using the application, because Survey tracks usage based on keyboard and mouse actions made by users within the applications. Other solutions, such as SMS, SCCM, Altiris, Tivoli, Remedy, Heat, etc., base usage strictly on opening and closing the software. This solution may help further reduce your overall IT spending by eliminating unnecessary maintenance obligations, reallocating existing software licenses, reducing annual true-up costs, and cutting back on support needs.

ExpertConnect

Zones will provide PEs with access to our ExpertConnect teams, which will collaborate with the PEs to craft best-in-class, multi-vendor solutions to complex technology issues. The advantages of this team include:

- Knowledgeable and experienced authorities in their field. ExpertConnect specialists have practical, hands-on experience. These professionals have undergone extensive training and hold multiple technical certifications.
- Cross-category, multi-vendor solutions. ExpertConnect specialists confer with one another to formulate the best solutions covering hardware, software and services. Engage one of these IT specialists and you'll gain access to an entire team of resources.
- Consultative approach to deliver maximum value. With thousands of IT products, services and procurement methods available, it's difficult to find all the resources necessary to make informed decisions. Zones ExpertConnect specialists consult with you to craft cost-effective, beneficial solutions.

ExpertConnect Software Licensing

The ExpertConnect Software Licensing team is made up of experienced software professionals who ensure you get the highest return on your investment.

- Explain the myriad of licensing programs to you and assess whether you are getting an optimum return on the licenses you currently have.
- Ensure you do not have too many or too few licenses for the software applications being used throughout your organization.
- Maintain a deep understanding of the licensing programs of leading brands:
 - Microsoft Large Account Reseller (LAR), we also can assist you with Select, Open and other Microsoft volume licensing programs
 - Microsoft Certified Solution Provider (MCSP)
 - Software Asset Management (SAM) certified
 - Adobe Cumulative Licensing Program (CLP)
- Licensing provider for Symantec, McAfee, Trend Micro, Citrix, and many other software manufacturers

ExpertConnect Security

The ExpertConnect Security Team consists of highly trained and well-seasoned IT security specialists whose sole responsibility is to ensure that you and your IT assets are secure.

- Secure your network to prevent unwanted intrusions
- Ensure your systems are protected against external threats such as phishing, SPAM and malware
- Guarantee data integrity and regulatory compliance
- Combat internal threats with a comprehensive data loss prevention strategy
- Design solutions to protect your physical assets
- Maintain a deep understanding of the licensing programs of leading brands:
 - IBM ISS: Internet Security Systems Technical V1, Internet Security Systems Sales Mastery, Managed Security Specialist
 - VMware: VSP; VTSP
 - CA: Internet security product specialist
 - McAfee: Data Protection, System Security
 - Symantec: Protection suite, Enterprise Security Manager, Mail Security for Microsoft Exchange, Mail Security for Domino, Network Access control, Data Loss prevention
 - RSA: SecurID Overview

ExpertConnect Virtualization

The ExpertConnect Virtualization team is made up of experienced professionals with an extensive understanding of all aspects of virtualization. Whether you are interested in virtualization around server consolidation, desktop/thin clients, applications or storage, our team of experts can help you craft the best solution for your unique situation.

- Zones has the following accreditations from our partners, recognizing our expertise:
 - VMware® Premier Partner and VMware® Authorized Consultant
 - Microsoft® LAR and Microsoft® Gold Certified Partner with Virtualization Competency
 - Citrix® LAR
 - Parallels® Gold Partner, Virtuozzo Authorized

- ExpertConnect specialists have the following certifications:
 - VMware® Sales Professional (VSP), VMware® Technical Sales Professional (VTSP), and VMware® Certified Professional (VCP)
 - Microsoft® Windows Server® 2008 and HyperV (MCP)
 - Parallels® Virtuozzo Certification
 - Citrix® Sales Expert (CSE)