NEXT STEPS:

IT Department-as-a-Service™

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Agenda

- SMB IT core functions overview

- IT Managed Services (MSP) menu

- Virtual CIO Services (vCIO) menu

- ProjexTeam™ eBusiness platform functions

- Getting started

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SMB IT Core Functions and Responsibilities

SMB business performance is driven by the competitiveness of products and services, the effectiveness of marketing and sales, and the strategic integration of operations and IT to create sustainable, strategic advantages:

- Managed Services (MSP) are operationally oriented:
  - Network/servers/security
  - User help desk/training/mobile device support
  - Business continuity/asset management

- Virtual CIO Services (vCIO) are strategically oriented:
  - Strategic IT/business management
  - Analytics toolkit to drive growth, productivity and engagement
  - CRM-to-Cash business process optimization

- eBusiness Platform functions are speed/agility oriented:
  - Extranet – internal/external teams
  - Integrated web presence – platform/website/ecommerce
  - Collaboration/networking/project management
  - Online learning/document management

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IT Managed Services Menu

- Platinum Server Care

- Help Desk

- Mobile Device Management

- Business Continuity/BDR

- Field Services/Hardware

- IT Asset Management

- IT Projects

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Server Care Platinum:

- Proactive 24/7-365 monitoring and remediation

- Multi-vendor antivirus management

- Remote problem resolution and restart by NOC

- Hardware and software audits

- Ticket-based workflow and escalation

- System performance analysis and troubleshooting

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Help Desk:

- US-based end user support

- LogMeIn Pro remote control

- Performance and preventative maintenance reports

- Antivirus management – Webroot Antivirus license

- Malwarebytes Anti-Malware Pro™ software

- Hardware and software audits

- Administrative scripting and policy management

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Mobile Device Management:

- End-to-end corporate/BYOD mobile device support

- Passcode and encryption enforcement

- Device restriction controls

- Email access controls

- Remote locate, lock and wipe

- Advanced MDM – App management, expense management

- Secure MDM – Mail, browser, app management, app security

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Business Continuity/BDR:

- End-to-end management of backups by NOC (24/7-365)

- Granular scheduling for backups and retention

- Cloud storage replicated to two data centers

- Unlimited local backups with offsite cloud storage management

- Tickets for backup related issues that need MSP attention

- Full disaster recovery support

Field Services/Hardware:

- Identification through RMM (tickets or direct request)

- Select priority – routine to urgent

- Technician dispatch and scheduling management

- Hardware replacement (if required)

- Active IT systems technical support to technicians

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IT Asset Management:

- Asset inventory via network scan

- Asset editing (OS, software licensing/compliance)

- Software inventory and audit

- Deployment module – deploy scripts, registry, uninstallers, installers

- Excellent/comprehensive reporting

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IT Projects – Scheduled per Your Timeframe:

Typical Desktop Projects

- Anti-spyware/anti-malware scans

- Anti-virus scans

- Disk defragmentation

- Browser installation/troubleshooting

- Java installation/updating

- Microsoft projects

- Adobe® projects

Typical Server Projects

- Active Directory setup/migration

- Exchange Server setup/migration

- Physical-to-virtual machine conversion

- Service pack installations

- VMware server setup

- Small business server setup/migration

- Webroot deployment

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Virtual CIO Services (vCIO) Menu

- vCIO strategic consulting services

- vCIO analytics toolkit

- CRM-to-Cash business process optimization

- Commercial cloud-based applications

- Custom software development

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Strategic Consulting Services:

A Virtual CIO (vCIO) is a company that serves as an organization's chief information officer, providing strategic or operational services that complement the client organization's internal resources, including:

- IT/business strategic and operational alignment

- Productivity analytics, tools and solutions

- Business growth analytics, tools and solutions

- Employee engagement analytics, tools and solutions

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vCIO Analytics Toolkit:

- Performance assessments – IT, functional and financial

- Frameworks – Enterprise/detailed structure of all business functions

- Roadmaps/Playbooks – Strategic planning, marketing, sales, human capital management

- Business development methodology – Book/eBook and training course

- Data mining – access to multiple best practices, KPI and industry databases

- Research – Custom research projects using BI tools and multiple databases

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CRM-to-Cash Business Process Optimization:

CRM-to-Cash, also referred to as CTC or C2C, is the set of business processes involved with forecasting, receiving and fulfilling customer orders for goods and services:

| ORDER FORECAST | CUSTOMER ORDER | ORDER FULFILLMENT | ORDER DELIVERY | ORDER INVOICING | PAYMENTS/ COLLECTION | CASH APPLICATION |

CRM-to-Cash – Detailed Processes:

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Business Process Management (BPM):

Business Process Management is the modeling, automation, execution, control, measurement and optimization of business activity flows. There are two categories of software tools designed to optimize business processes individually, or across the complete CRM-to-cash process:

- **BPM Tools** – Focus on coordinating work across all resources: People, information, machines and systems. These tools are used to discover, design and manage business processes across the organization.

- **iBPM Tools** – Intelligent BPM refers to a suite of tools that includes real-time analytics, complex business process modeling, business maturity monitoring, social and collaborative capabilities in addition to the core functions of BPM tools.

Commercial Cloud-Based Applications:

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Custom Software Development:

Projex IMC is uniquely qualified to define, discover, and deliver custom software development projects for fixing a business process, supporting a project or sharing data across multiple systems. Our capabilities include:

- Business process management

- Project management

- Software development and testing

- Change management and user training

- Documentation management and maintenance
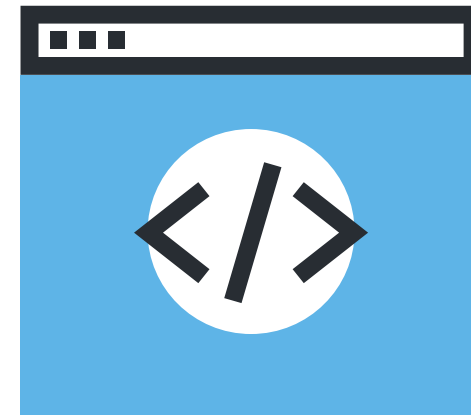
ProjexTeam™ eBusiness Platform:

- **Open source code base** - (GPLv2+)

- **LAMP stack** - Linux/Apache/MySQL/PHP

- **RESTful API** - facilitating integration with a wide range of third party software applications

- **Pluggable model** - (WordPress plugin repository + PROJEX/client custom extensions)

- **Well supported** - WordPress powers 25+ percent of all web properties worldwide

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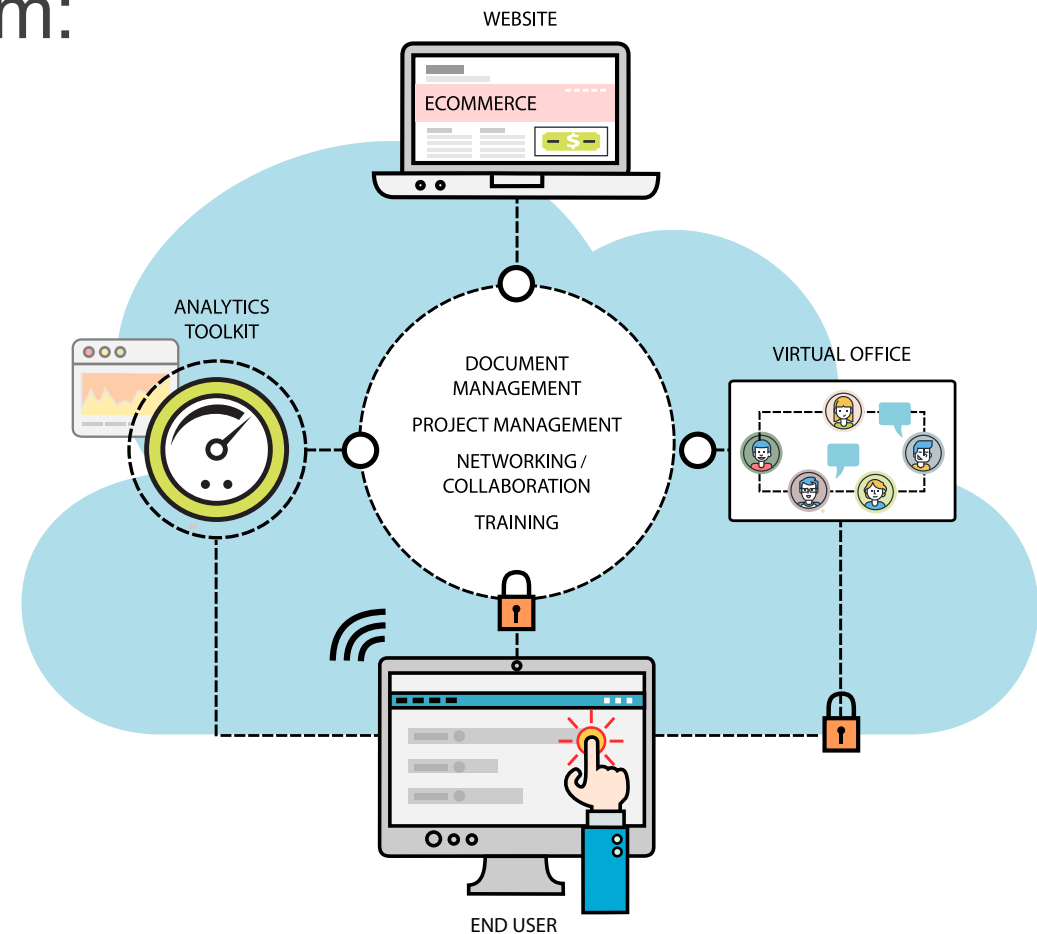
Platform Functionality:

ProjexTeam™ provides essential functionality for SMB owners and managers seeking to elevate business performance through closer alignment of IT and other critical business functions:

■ **Networking** - ProjexTeam™ includes built in tools for strategy development, collaboration, project planning, activity management, document management and training. Internal (management/staff) and external (sales representatives/distributors/contingent workers/OEMs/consultants/supply chain partners) team members communicate and collaborate in a seamless, secure online environment.

■ **Embedded content** - ProjexTeam™ includes embedded tools and resources to help your team optimize key business functions: IT/operations, marketing/sales and human capital management.

■ **Web framework** - ProjexTeam™ provides a flexible framework for website development, content management, social engagement and ecommerce transaction support.

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Platform Customization:

ProjexTeam™ is WordPress-based, open source software, allowing quick, cost effective customization:

- **Brand it** – Let everyone know ProjexTeam™ is *YOUR* eBusiness platform, not ours

- **Extend it** – Add/edit/delete content and extend functionality to suit your business needs

- **Move it** – Host ProjexTeam™ at our data center or move it to your own internal servers – your data is always yours

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One Platform: Three Integrated Applications

Productivity

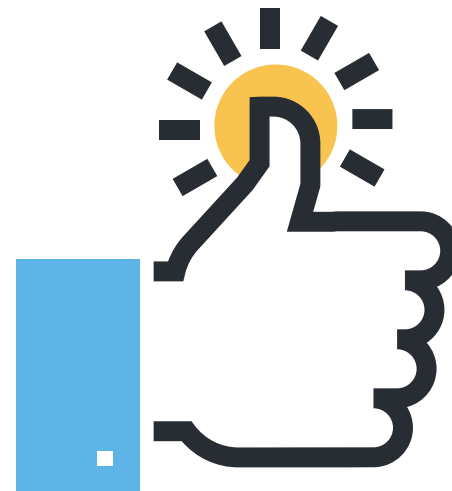- Strategy/business planning/IT alignment

Business Growth

- Marketing automation/sales enablement

Engagement

- Human capital management

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Getting Started …

- Questions/follow-up requested

- Managed services evaluation program – statement of work

- Benefits of network security assessment

- Next steps

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Getting Started …

Managed services evaluation program – statement of work

Projex IMC will provide the following analytical services, reports and consulting to the client at no cost until the completion of the 30-day operational trial period:

① **Network security assessment:**
- Non-disclosure agreement
- Site data collection/secure and non-invasive
- Input data to report builder app

② **Review network security report:**
- Network assessment and issues/security assessment and issues
- Budgetary proposal and recommended network upgrades

③ **30-day operational trial:**
- Install server software (up to 3)
- Install desktop software (up to 20)
- Connect to PROJEX operations platform
- Set up virtual office
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④ **Full operations:**
- Set up IT eBusiness platform
- Conduct quick start IT department tools training

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Benefits of Network/Security Assessment …

- **Unobtrusive/non-invasive/secure:**
  - No agents, probes or software to install
  - No business data or passwords are gathered or transmitted

- **Identify critical network issues:**
  - Active/inactive user/login analysis
  - Active/inactive computer/age inventory
  - Major application installation inventory
  - Password strength analysis (Microsoft Baseline Security Analyzer - MBSA)
  - Missing security updates (Microsoft Baseline Security Analyzer - MBSA)
  - Server/computer hard drive storage analysis
  - Anti-virus/anti-spyware software detection
  - Remote listening ports
  - External security vulnerability

- **Identify critical security risks:**
  - Outbound security – system leakage/web filtering/wireless access
  - Password policy analysis
  - Account lockout policy analysis
  - Computer login analysis
  - User login analysis

Thank You!

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