# Proposal

## Current Recommendations

We have been apprised of the current recommendations of BKY Consulting for Walrus Associates. Our understanding is that BKY Consulting has recommendations in the following topics areas:

Telephony

Internet Services

Support

Staffing and Outsourcing

Network

Servers

Common Operating Environment

Physical Plan

Fax

E-Mail

Backup & Recovery

Security

Video

Remote Access

Documentation Policies and Procedures

Contracts

Inventory

The purpose of this proposal is to identify which, if any, recommendations BTR Associates could be responsible for and to provide pricing for various options from which Walrus Associates and BKY Consulting may choose.

## Who We Are

BTR Associates is a small consulting firm of loosely associated independent consultants in various areas around the world (New York, Boston, Philadelphia, and The Netherlands). Dr. Jerry Thomason is the principle in the Philadelphia area, and the owner of the firm. BTR Associates is a virtual organization without any main offices or buildings to maintain (lower overhead costs). Dr. Thomason maintains a handful of carefully selected clients with whom she has a long term relationship. What she does for those clients is determined by the needs of the client as she has deep experience in a variety of areas including software and hardware, databases, applications, networking (LAN & WAN), planning, prioritizing, systems management, collaboration, virtual communities, documentation, and training.

How We Work

Our relationships with our clients are long term (not less than one year) and problem prevention oriented. Our goal is smooth computing. We do not provide hourly rates because we do not measure our value to our clients by how many hours we spent, but rather by how much value we bring to them. The value we bring is peace of mind because we are there to ensure the best information technology decisions possible.

Typical vendors have a financial incentive to fix problems, so their focus is often not on preventing problems. Our agreement provides the type of focus necessary to set up systems to prevent future problems. After the initial phase, the less you need us, the happier we are. Our goal is that you are never bothered again by outages, viruses, spam, lost backups, delayed installations, etc.

Option #1: Advice Only

The recommendations laid out by BKY Consulting have a number of different levels. There are several projects which would be considered 'strategic' or 'planning' oriented. Among those are tasks which BKY Consulting would be doing, items such as:

Prioritizing the recommendations

Choosing new vendors for

Telephony,

Internet Hosting,

Internet Access,

Desktop provisioning,

Help Desk

Support, etc.

Dr. Thomason would "provide ongoing support" for the plans established by BKY Consulting, She would keep an eye on the plans as they were laid out and ensure that they were progressing as expected. She would meet regularly with Charles Walrus and Walrus Associates employees (as well as BKY Consulting, if necessary) in order to provide whatever help is wanted to move forward on the recommendations.

Dr. Thomason would also supplement whatever planning was not done in the first phase. She would facilitate discussions and share her expertise as needed. Additionally, she would prepare documentation for best practices and help Walrus employees decide on procedures. There are several 'documenting & best practice' type items which will be necessary, including:

Defining and Documenting

Backup Procedures

Restoration Procedures

Common Operating Environment

Email setup Procedures

New System Procedures

Security Procedures

Password Authentication Procedures

An IP Addressing Scheme

Firewall and DMZ

Server Consolidation Needs

Remote Access Needs

An Inventory of Hardware and Software

Maintaining Oversight on "Big Picture" decisions regarding technology.

Knowledge Transfer of best practices.

Development of Technology Vision plan and annual revisions of plan.

Supervising regular preventative maintenance.

In order to properly help her clients, Dr. Thomason feels that regular dialog on the big picture of technology decisionmaking is essential. Dr. Thomason will provide quick response (within 2 hours) in order to help in the event of an emergency. There is an expectation, however, of a reciprocal response from the head decision maker of Walrus Associates, Charles Walrus. It is essential that, if necessary, Mr. Walrus is available to make critical decisions in a timely manner.

This option is the base that will underlie all other options discussed in this proposal.

Option #2: Advice Plus Network

In addition to some of the strategic items discussed, there are some particular network implementation items involved in the recommendation. These network tasks include:

Implementing DHCP

Implementing a true Firewall and DMZ

Establishing an IP Addressing Scheme

Integrating New Computers into the Network

Consolidating Servers

Providing Remote Access

Establishing a VPN

The second option would entail providing advice, making hardware recommendations, but then also implementing these recommendations. This would include hands-on effort as necessary. In order to avoid impacting the working environment, project work may be done on weekends and evenings.

Option #3: Advice Plus Security/Backup/Restore

In addition to some of the strategic items discussed, there are some particular security and business continuity implementation items involved in the recommendation. These security tasks include:

Implementing Backup Procedures for all systems including desktops

Testing Restoration by simulating a disaster

Establishing a future testing frequency

Training alternative employees on backup and restore procedures

Implement security procedures

Establishing automated Anti Virus updates

Change passwords and implement password authentication procedures

Train users on secure passwords and security procedures

Consolidate and Secure (ie - move to another room) servers

Consolidate Power Management.

The third option would entail providing advice, but also making hardware recommendations not only for smooth networking, but also hardware and software implementation to ensure the safety and security of the information on the network. This would include hands-on effort as necessary as well as policy implementation and training as necessary.

Option #4 Deluxe Plus Email/Collaboration/Intranet/Web Enhancement

Frankly, Options 1,2,&3 are about survival. All three are a matter of laying the infrastructure to stay alive and not be shut down by spam, viruses, blackouts. Along with desks, paper, and phones, a secure and backed up network is necessary to ensure that there will be a businesses in the future.

There are many options beyond the basics, however, that have become affordable in recent years due to software and hardware enhancements of the Internet and Video capability. To have an advantage over your competition, more than just the basic survival is required. This fourth option includes spending extra time to think strategically about ways of leaping over the competition. This fourth option also includes a vision of the future. That might mean an Extranet for clients, (a online Knowledge Base, chat capability, a discussion forum) and an Intranet for employees (a place to find procedures, employee forms, a discussion forum). New technologies would be investigated for inclusion in the Walrus systems and additional income producing possibilities. Additionally, choices such as video conferencing and virtual meetings might prove to be invaluable tools. This fourth option will provide Walrus with the decision making tools necessary to keep up with today's technology, and figure out when to implement tomorrow's technology for the good of Walrus customers.

What Our Clients Say

We find that rather than further describe our services to you, it is much more effective for us to share what our clients have written or told us about our services in the past. Feel free to contact anyone on this list and ask about us.

About Consulting

“Jerry's business expertise straddles large and small, startup and established. She provides the kind of insight which you would normally find in a world renowned consultant, but she is much more responsive and closer to home. Her command of a variety of areas makes her uniquely qualified to tackle difficult challenges. She is more proficient than specialists in so many areas - including (but not limited to) leadership, technology decisionmaking, people management, educational approaches, business strategy, architectural design, project prioritization, and forecasting. Whether Jerry is teaching a course, starting a business, or providing high level consulting, she always demonstrates the characteristics of a consummate professional. Without reservation, I would highly recommend Jerry Thomason” Jack Sprat, Founder & CEO (retired), SI Handling, Inc.

“Due to Jerry's efforts, I was able to present to executive staff the need to improve the security in our networking. While it is difficult to assess an exact value on the recommendations, we have certainly saved at least four time the amount paid in the first eight months alone. Jerry's recommendations on standardizing in many areas have been followed, allowing us to improve our ability to keep the systems (especially operating systems) current in versions and patching levels. In the last eight months, we have not had any major problems or system downtime from any of the sources [that previously caused problems]. We have saved a lot of staff time in cleaning up from these attacks, and been able to use that time proactively elsewhere. We will engage her services again - and highly recommend Jerry to any organization in need of analytical consulting. ” Lee S. Baker, Director of Information Technology, Drug Plastics & Glass Company, Inc.

“Excellent! Significant progress has been made to create new innovative ways to capture information and integrate technical and financial information. Tremendous progress has been made. Jerry has worked effectively with members of the CTO sector, and has lead a team to successfully integrate the SDM process with the approval process. Jerry has been instrumental in revising the Management Excellence packages and working on the executive information system. Many changes among the department and wider division have taken place in the way people utilize their PCs. Meeting minutes are now done with styles - saving hours each month. Requests are done in a database, saving hours each week. Changes have taken place in TACS, Personnel, CFO Admin, the Controllers office, and Taxation - Plans are moving along! Jerry has done a superior job supporting Resource Allocation Development and leading change. She is a solid professional. ” Caroline Wren, Senior Executive Vice President, MBNA

“EMCOR Group, Inc. has engaged Jerry Thomason as a consultant on several occasions. In the last project, decisions had to be made as to whether to upgrade the legacy system prior to migration and conversion (or after). The recommendations that Jerry made probably saved EMCOR over $200,000 due to her finding that we did not, in fact, need to move off the legacy system (regardless of what the vendor was telling us). The project came in one month early and $100,000 under budget - due to her direct efforts. ” Peter Pumkineater, Director Applications, EMBOR Group, Inc.

“Jerry is technologically extremely savvy, but she has a more managerial and strategic thought process than many techies. I'm continuously impressed with Jerry's broad based entrepreneurial and business management experience in several business settings ranging from very small firms to larger companies. ” Raymond J. Sailor, Chairman, President and CEO, Leesport Financial Corporation

“The benefits to our organization of Jerry's contributions will be yielding dividends for years to come. ” Virginia D. West, Chair of the Board of Directors, Pacem In Neverneverland

“Jerry provided the technology management expertise to partner with all the areas and successfully deliver IMPACT, the new Capital and Project tracking system. Jerry brings the same level of high commitment and energy to all work that she touches, and through applying her technology background to the department business strategies, has been able to deliver innovative enhancements to processes, reporting, and information delivery. ” Steve Hussy, Senior Vice President, MBNA

“The quality of [Jerry's] work as a consultant is so terrific that verbal acknowledgement does not do it justice. I hope this letter can go a little further in conveying my respect, appreciation, and gratitude. Our systems were devastated - it took days to make things right - and Jerry did it all with relaxed good The technical nature of what Jerry does is way beyond my powers of comprehension. What I do know is that she has solved every problem we've had, and given me a literal and emotional safety net. Each time, Jerry has come through for us promptly, effectively, and with such grace that we are left to wonder how other people manage. Not only do we know that we can count on Jerry in the future, but, thanks to the systems she has put in place, things can never get as bad as they did in the past. I can only hope for the good fortune to keep working with Jerry in the years to come. ” Jane Kelp, President, Jane Kelp Marketing

“Jerry's attention to detail and vast knowledge in her field has helped me to better organize and take advantage of the power of our new system. Jerry responds very quickly to my questions and problems by telephone, email, or personal visit. She has made my systems more efficient, and, in many cases, faster in their operation. Jerry has the ability to go into a program or system in a manner that no average user would even think of doing - never mind knowing how to do these procedures. I would strongly recommend Jerry to any individual computer user or corporate entity. ” Conrad Koalabear, President, FilmCon

“Jerry is thorough in her preparations. She makes sure she gets quality input. Jerry goes the extra mile to do a thorough job. She is extremely dependable, doing whatever it takes to get the job done. ” Darren Karren, Senior Vice President, First USA, Bank One

“[Jerry] has been the snowplow in the storm and has cleared the way to keep our project moving. [Jerry gave us] help in getting the focus needed on the MVS project. It's been a long road and we are beginning to see the end in site. Jerry has contributed greatly to getting issues identified and resolved. ” Susan Miler, Managed Maintenance, First USA, Bank One

“Jerry' energy is contagious and made her an invaluable asset to all areas. ” Chuck Cheese, PCI, MBNA

“Jerry is very knowledgeable - she has the insightfulness and the ability to deal with processes. Jerry is one of the few who clearly understands the interrelationships between the various IS processes (project office, change management, problem management, work request, work order) and is working to build the links between and across these processes. Jerry works with everyone to ensure that the final solution will be an enterprise solution. Jerry accomplishes responsibilities with superior outcomes. She completes the task with great urgency and low error ratio. ” Brian Brainstone, Senior Vice President, First USA, Bank One

“Jerry understood my frustrations - she developed a process to build and maintain useful distribution lists that assist with the communication throughout the organizations. ” Diane Finestine, MIS Analyst, First USA, Bank One

“Jerry responds to every challenge with drive and determination. While managing the TRAX pilot, she committed to a very aggressive project plan and met all of the commitments despite several technical obstacles.” Teresa Weazey, VP, Metrics, First USA, Bank One

“It would have cost us much more to hire a programmer or consultant from McKinsey. Now we can maintain it ourselves and we get all the reporting we need, anytime we need it. ” Sandy Shandernam, Project Director, The Food Trust

“Our wake-up call was losing data we thought was backed up—because our nightly back-ups weren’t working. Now we know we can restore data even after a systems failure. ” LouAnn Kake, CEO, Hitchcock Enterprises

About Leadership

“Jerry's ability to assess an employee and his working methods/ability caused the company to reassess its view of his value to the organization, and to adopt a fresh approach in working with him. Not having to replace this senior employee presented significant quantifiable savings - at least five times the fees. ” Lee S. Cookie, Director of Information Technology, Drug &Glass Company, Inc.

About Mentoring

“I may be most grateful for Jerry's calm, good-natured and articulate manner. She explains things so clearly that even I can understand and she does it without a trace of the patronizing impatience so common among computer consultants. ” Jane Jackson, President, USF&G

“I've been a computer user for over 15 years working extensively in my web site design, video editing, and photographic manipulation as well as developing my own brochures, invoices, business cards and other customer print designs. But in the short couple of months that I've worked with Jerry, I have grown tremendously in my abilities, and create higher quality print and visual productions. Jerry's good humor and teaching skills are unique in her field. Her manner of communicating, backed by her extensive knowledge, is the highlight of her services. ” Jorge Borge, Desks Incorporated

“Just what I require to help me gain the confidence I need to work more effectively. I am very pleased. ” Joanne D. Chuust, President, Fine Artist and Antiques

“Jerry is always there - every time I need her. She goes the extra mile, and always finds the problem no matter how long it takes. She doesn't give up. ” Harold Harrison, Vice President, Bank One

“New technology can be overwhelming - unless you have someone you can trust that you can call anytime. It's a great feeling to call Jerry and know that you're getting the best. ” Dave Bosler, Partner, Lewis/Bosler/Kurz and Associates, Inc

About Speaking

“She can read the audience, frame the message, exact a response. To give a specific example, she did a superb job on an Alumni day panel with Pete Musser (CEO of Safeguard Scientifics) and Austin Furst (CEO of Vestron) where the points she made came echoing back from the folks as we mingled at lunch. ” Gerry Geraldine, Founder & CEO (retired), Richtor, Inc.

“Both the workshop Jerry presented and the panel that she arranged and moderated were highly rated by those attending. When someone says, Should have been longer, you know Jerry had their interest! The interest in Jerry's presentation was so high, in fact, that we plan to change the format of the event next year to provide a keynote opportunity for Jerry at another major part of the event. When Jerry began her talk, she literally stopped people in their tracks as they listened to her points. ” Mike Catheter, VP, Foreign Trade, Technology, and Investors Forum, Jerold County Chamber of Commerce

“I really enjoy listening to Jerry. She is very knowledgeable and catered to the audience. The session was awesome!! ” Jackie Chan, Nutrition Education, The Food Emporium

“Jerry' passion for her work is clear both in one on one meetings, small groups, and even large assemblies. She presents information clearly, concisely, and with feeling.” John Lehman, Senior Vice President, First USA, Bank One

“Jerry is a well-versed individual with excellent presentations skills. She is able to communicate effectively across various disciplines and lines of management. ” Brian Hotela, Senior Vice President, First USA, Bank One

“Jerry Thomason did a great job. I would highly recommend her to others. She would be a useful speaker at any company - thanks for having her as a speaker in this course. ” Claire Kreen, Corporate Library, Unisys Corporation

About Writing

“Her ability as a communicator is supreme. She is an excellent speaker and an engaging writer. ” Jack Srasten, Founder & CEO of Jorner Corner, Inc.

“Jerry originally impressed me with her teaching skills, and of all the many skills that she has, I believe her ability to explain complex subject matters may be her strongest suit.” Fred Ked, Chairman, President and CEO, Limerick Financial Corporation

“Jerry does a great job breaking down complicated technical issues and explaining them in language that people can easily follow and understand. ” John Johnson, Managing Editor, Western Pennsylvania Business Journal

“[Jerry] is a very good writer. All the info is there, and her writing is a pleasure to read. ” Kathy Kantner, Features Editor, InfoWorldWeek

Authorization to Begin

This signed agreement authorizes Jerry Thomason of BTR Associates, Inc. to begin the work:

Walrus Associates agrees to pay BTR Associates the amounts described here.

|  |  |
| --- | --- |
| Choices | Amount |
| Option #1: Advice Only | $3000 a month for 12 months |
| Option #2: Advice Plus Network | $4000 a month for 12 months |
| Option #3: Advice Plus Security/Backup/Restore | $5000 a month for 12 months |
| Option #4 Deluxe Plus Email/Collaboration/ Intranet/Web Enhancement | $6000 a month for 12 months |
| Service expectation includes a direct two way response agreement between Jerry Thomason and Charles Walrus: within 2 hours for an emergency, within 48 hours for a non emergency.  It is understood that time and effort expended will be variable; full time effort may be required for several weeks initially, with focus decreasing over time depending upon option chosen. After initial year, agreement may be continued on a month to month basis. | |

Authorization

Please sign and return to BTR Associates at PO Box 555, Tentville, PA 19555-0564 with the initial month's fee if you would like Jerry Thomason to schedule the work. You will be billed on the first of each month thereafter, terms are due upon receipt.

Please be advised that the window for choosing is closing. At the present time, Option #3 and Option #4 are only available as choices if the begin date is prior to July 2, 2007. Option #2 will no longer be available after August 6, 2007. Rates are subject to change after June 28, 2007.

Begin Date

The begin date scheduled for \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. Rescheduling of the begin date does not affect the due dates or terms of this authorization.

Walrus Associates:

(Charles Walrus, Owner) (date)

Billing Address: Walrus Associates, 7811 Jackson Road, Northco, NJ 08004-1232. Phone: 800 555-5257

BTR Associates:

(Jerry J Thomason, Owner) (date)

Payment Address: BTR Associates, Inc, PO Box 555, Tentville, PA 19555-0564

Phone: 484-555-3331. EIN # 66-3097870.