**Consulting Proposal**

BTR Associates  
PO Box 555  
Tentville, PA 19555-0564

# Walrus 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.

## Authorization to Begin

This signed agreement authorizes 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. | |

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## 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 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.