



## Premium Business Support Services

To proficiently run your business, you rely on your business application to run as efficiently as possible.

Our mission is to help ensure that you get the most out of your IT investments. Whether you are looking to improve your bottom line, enhance productivity, or use technology to realize new business opportunities, The Rand Group (TRG) is ready to assist. From business support to strategic consulting, we offer a full range of Premier Support services for any stage in your business and technology lifecycle.

## Annual Half Day Partner Strategy Session

Regardless of the size of your organization, your position in the organization, the systems you own or the industry you work in The Rand Group strives to be your strategic business partner. We are here to make processes more efficient by right sizing technology to fit your organization. Our *Annual Half Day Partner Strategy Session* is an integral step to integrating people, processes and technology in order to mitigate business risk, reduce operating costs and enhance revenue.

The purpose of the *Annual Partner Strategy Session* is designed for business influencers, accounting, operations, sales and technology managers to gain valuable insight into the return on your current investment of time, money and resources in the Microsoft/Sage business systems.

The value of the *Partner Strategy Session* is to provide proactive guidance regarding where you are today along with specific recommendations in support of business objectives that:

- Optimize existing and new IT investments across your organization to realize the best return on new investments and drive new capabilities/functionality from existing investments
- Connect what you have and will have with relation to the software publishers' current product roadmap
- Drive processes to operate more efficiently and effectively – from individuals to the overall organization
- Strategic collaboration with a trusted advisor

## Sample Meeting Agenda

### Introductions and Objectives

#### Part 1 – Update: A Look Back

- What were the business objectives one year ago? Grow, Maintain, Cutback, Survival
- What changes were adopted to support the objectives?
- What are the business objectives for the coming year?

#### Part 2 – Analysis and Review: Current Status

- Review of premium business support services performed during the past year
- Review easy to read scorecard of results and expectations providing a 360 degree view
- Overview and understanding of what's next for your business

#### Part 3 – Recommendations: Looking Ahead

- Enhancement Recommendations
- Training Recommendations
- Process Change Recommendations



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### Annual Licensing and Deployment Review

Over time software licensing, versions and functionality can change where new functionality is added and some functionality is retired. As things change organizations want to know that they are using all of the resources available to them and the right technology is in place for successfully meeting the needs and demands of the organization.

The purpose of the *Annual Licensing and Deployment Review* for Microsoft/Sage ERP/CRM is to provide a comprehensive accounting of the business technology you have purchased and is available to you today. In addition any technology and/or functionality that is available but not currently in production is identified.

The value of this *Licensing and Deployment Review* for your Microsoft/Sage system is to provide you with a view of how your business systems are currently meeting your needs today and guides you to the next steps of obtaining the most return for your technology investments.

A TRG Business Services Support Professional works with you to document how you currently use your Microsoft/Sage products in your organization. An analysis of key deployment points is performed to create a formal review of the production deployment. The end deliverable is an easy to read PDF format document which provides both an overview and supporting detail of the licensing and deployment of your specific business system.

This premium business support service documents for you how the investment in Microsoft/Sage is currently meeting your needs today and guides you to the next steps of obtaining the most return for your existing technology investment. Understandably, after the *Licensing and Deployment Review* is completed, TRG will have also have a better understanding of your business and technology investment as we deliver superior support and work towards building on the trusted advisor relationship that is the foundation of our success.

### Review Scope

The Scope defines the objectives of the review and lists the activities that are considered a part of the review (along with the activities that will not be part of the review).

#### In-Scope:

- Review existing licenses and functionality of Microsoft/Sage products
- Review existing Licensing and functionality of Microsoft/Sage third party products
- Document what Microsoft/Sage functionality has been deployed
- Provide findings, recommendations and best practices for the current Microsoft/Sage production deployment

#### Out-of-Scope:

- Reporting recommendations
- Installation or deployment procedures or methodologies for any of the Microsoft/Sage components
- Installation or configuration for any non Microsoft/Sage products
- Any areas that the regular TRG support channel or your partner should be used for (service pack installations, installation procedures, installation issues, or others)
- Performance consideration for custom entities and enhancements of any non Microsoft/Sage applications and add-ins
- Detail about functionality or performance of the next release of Microsoft/Sage products
- Detailed test environment considerations
- Bandwidth requirements for Microsoft/Sage clients
- Detailed upgrade plan

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### Annual Environment and Client Profile Review

Technology and business needs and demands are never current for very long. Keeping up with new releases and changing demands for any business is often difficult to ascertain and keep up to date.

The purpose of the *Annual Environment and Client Profile Review* for Microsoft/Sage ERP/CRM is designed to provide an annual assessment of hardware specifications, operating systems as well as the activities and processes being supported by the these systems.

The value of the *Environment and Client Profile Review* for Microsoft/Sage is in having current and up to date system and process information and prescriptive guidance about how your physical infrastructure is supporting the business processes and demands in your organization today.

A TRG Business Services Support Professional works with you to gather and compile key information about your business and processes we call the "Client Profile". We also gather and document key hardware and operating system software supporting the business applications we call the "Environment". The information gathered is documented against the current recommendations and best practices for your specific "Customer Profile" as determined by the software publisher. The end deliverable is a PDF format document which provides both an overview and supporting detail for the specific Microsoft/Sage business system.

This premium business support service documents for you how the investment in Microsoft/Sage is currently meeting your needs today and guides you to the next steps of obtaining the most return for your existing technology investment. Understandably, after the *Environment and Client Profile Review* is complete, TRG will have also have a better understanding of your business as we deliver superior support and work towards building on the trusted advisor relationship that is the foundation of our success.

### Review Scope

The Scope defines the objectives of the review and lists the activities that are considered a part of the review (along with the activities that will not be part of the review).

#### In-Scope:

- Gather and document "Environmental" data
- Gather and document "Client Profile" data
- Provide findings, recommendations and best practices for the current Microsoft/Sage production deployment

#### Out-of-Scope:

- Reporting recommendations
- Installation or deployment procedures or methodologies for any of the Microsoft/Sage components
- Installation or configuration for any non Microsoft/Sage products
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### Annual Performance Review

In today's ever changing climate business needs and demands change as well. Knowing that current business systems, resources and processes are at peak performance is a key business objective.

The purpose of this *Annual Performance Review* for Microsoft/Sage ERP/CRM is designed to provide an annual analysis and evaluation of the business systems and processes that are impacted by demand, frequency and resources in your organization.

The value of the *Performance Review* for Microsoft/Sage is in developing specific metrics to measure the performance of your business systems and resources. The review includes prescriptive guidance on improving and management of the business system for peak performance returns.

A TRG Business Services Support Professional works with you to gather and document key data about the current system processes and the frequency, demand and resources in the production deployment. The information gathered is compared to current recommendations and best practices for your specific organization. The end deliverable is a PDF format document which provides both an overview and supporting detail for the specific Microsoft/Sage business system.

This premium business support service documents for you how the investment in Microsoft/Sage is currently meeting your needs today and guides you to the next steps of obtaining the most return for your existing technology investment. Understandably, after the *Annual Performance Review* is complete, TRG will have also have a better understanding of your business as we deliver superior support and work towards building on the trusted advisor relationship that is the foundation of our success.

### Review Scope

The Scope defines the objectives of the review and lists the activities that are considered a part of the review (along with the activities that will not be part of the review)

#### In-Scope:

- Gather and document current business system process
- Gather and document frequency, demand resource performance data
- Provide findings, recommendations and best practices for the current Microsoft/Sage production deployment

#### Out-of-Scope:

- Reporting recommendations
- Installation or deployment procedures or methodologies for any of the Microsoft/Sage components
- Installation or configuration for any non Microsoft/Sage products
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### Annual Maintenance and Disaster Recovery Review

When properly planned and implemented, a maintenance and disaster recovery plan makes possible the retrieval of lost data and the smooth resumption of system operations. Such procedures are a critical part of business system operations at all levels.

The purpose of this *Annual Maintenance and Disaster Recovery Review* for Microsoft/Sage ERP/CRM business systems is to provide an annual review of the maintenance and disaster recovery policies and practices currently in place.

The value of the *Maintenance and Disaster Recovery Review* for Microsoft/Sage is in knowing you have implemented best practices for maintenance and disaster recovery policies and practices. Such practices will undoubtedly reduce the cost of preparing for and recovering data from an unforeseen disaster.

A TRG Professional Services Support Professional works with you to gather and document the current maintenance and disaster recovery policies and procedures including a workable maintenance and disaster recovery plan as determined by the software publisher. This premium support service prepares and protects your organization from any substantial data loss and ensures you received the highest return for your existing technology investment. The end deliverable is a PDF format document which provides both an overview and supporting detail for the specific Microsoft/Sage business system.

This premium business support service strengthens and protects your current investment in Microsoft/Sage products in order to achieve the highest return for your existing technology investment. Understandably, after the *Maintenance and Disaster Recovery Review* is complete, TRG will have also have a better understanding of your business as we deliver superior support and work towards building on the trusted advisor relationship that is the foundation of our success.

### Review Scope

The Scope defines the objectives of the review and lists the activities that are considered a part of the review (along with the activities that will not be part of the review)

#### In-Scope:

- Gather backup, maintenance and recovery policies currently in place for the Microsoft/Sage products
- Provide findings, recommendations and best practices for the current Microsoft/Sage production deployment as determined by the software publisher

#### Out-of-Scope:

- Reporting recommendations
- Installation or deployment procedures or methodologies for any of the Microsoft/Sage components
- Installation or configuration for any non Microsoft/Sage products
- Any areas that the regular TRG support channel or your partner should be used for (service pack installations, installation procedures, installation issues, or others)
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## Annual Security and Access Review

Security and access policies are required to establish the requisite levels of access to protect confidential, sensitive, and private information and data contained in business systems. Because the size and requirements of an organization can vary a great deal, it is important to carefully consider the needs of both small and large deployments to weigh the effectiveness of security and access policies against the costs that may be involved.

The purpose of the *Annual Security and Access Review* for Microsoft/Sage ERP/CRM is to provide an assessment of the overall security and access policies and procedures in place for the business applications.

The value of the *Security and Access Review* for Microsoft/Sage is in documenting and/or deploying security and access policies and procedures that protect against information security related threats and dangers.

A TRG Business Services Support Professional works with you to gather and document the user security and access policies currently in place. Security and access refers to allowing only authorized users' access to a particular component or data in the business system. The information gathered is analyzed against the current recommendations and best practices as recommended by the software publisher for your specific deployment. The end deliverable for the *Security and Access Review* is a PDF format document which provides both an overview and supporting detail for the specific business systems.

This Premium Support Service documents for you how your Microsoft/Sage products are currently meeting your needs today and guides you to the next steps of obtaining the most return for your existing technology investment. Understandably, after the *Security and Access Review* is complete, TRG will have also have a better understanding of your business as we deliver superior support and work towards building on the trusted advisor relationship that is the foundation of our success.

### Review Scope

The Scope defines the objectives of the review and lists the activities that are considered a part of the review (along with the activities that will not be part of the review)

#### In-Scope:

- Gather and document security policies
- Gather and document access policies
- Provide findings, recommendations and best practices

#### Out-of-Scope:

- Reporting recommendations
- Installation or deployment procedures or methodologies for any of the Microsoft/Sage components
- Installation or configuration for any non Microsoft/Sage products
- Any areas that the regular TRG support channel or your partner should be used for (service pack installations, installation procedures, installation issues, or others)
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