



# SERVICE OVERVIEW: TECHNOLOGY EVALUATION AND SELECTION SERVICES

David L. Boone possesses 10+ years of technology evaluation and selection experience, and has assisted clients in a wide variety of industries to identify, evaluate and select needs-appropriate technology solutions. David holds a Systems Management (STEM-certified) graduate degree, with courses in acquisition management, decision sciences, deterministic modeling, managerial finance, operations research, probabilistic modeling (statistics), project management, systems analysis/engineering, and user centered design. He has attained Professional Scrum Master I certification with experience in Agile/Scrum and waterfall methodologies.

David guides clients through the myriad technology options and components available in the marketplace to engineer the best solution for their needs based on a rigorous process of evaluating requirements, cost, flexibility, performance, value, and other factors relevant to each individual client. He can also take the lead on the RFQ/RFI/RFP as required, as well as the establishment of scoring criteria and models, evaluation/selection committee proceedings and negotiations.

<p><b>CRM Cost Model – 10/1/2012</b></p> <p>October 1, 2012</p>		<p><b>Estimated System Acquisition Costs*</b></p>																									
<p><b>Analysis of Recurring Annual Costs</b></p> <ul style="list-style-type: none"> <li>Includes: Technical support costs and problem resolution, Version upgrades</li> <li>Includes: Technical support in month charged on an annual basis at 75.0% of initial cost</li> <li>Value Calculation: \$805,457 (Initial Cost) x 20% (Support Cost Factor) = \$161,091</li> </ul> <p><b>System Maintenance and Support</b></p> <ul style="list-style-type: none"> <li>Includes: System maintenance and enhancement accounts for 70% of the life cycle only</li> <li>Value Calculation: \$200,000 (Initial Cost) x 70% (percentage of life cycle cost for system maintenance) = \$140,000</li> </ul> <p><b>Hardware and Software Resources</b></p> <ul style="list-style-type: none"> <li>Includes: Hardware and software resources of complete program and associated backup of data</li> <li>Includes: Hardware and software resources of complete program and associated backup of data</li> <li>Value Calculation: \$120,000 (Initial Cost) x 100% (percentage of life cycle cost for hardware and software resources) = \$120,000</li> </ul>	<p><b>BEST AND FINAL OFFERS</b></p> <p>RFQ #022976 - Customer Relationship Management (CRM) System</p> <p>Adjusted Final / Final Cost of Proposed (FPO) Model, Version 6.4, 6/29/2013</p> <table border="1"> <thead> <tr> <th>Vendor Name</th> <th>Final Offer</th> <th>Final Cost</th> <th>Final Offer</th> <th>Final Cost</th> </tr> </thead> <tbody> <tr> <td>Oracle</td> <td>\$1,100,000</td> <td>\$1,100,000</td> <td>\$1,100,000</td> <td>\$1,100,000</td> </tr> <tr> <td>Microsoft</td> <td>\$1,200,000</td> <td>\$1,200,000</td> <td>\$1,200,000</td> <td>\$1,200,000</td> </tr> <tr> <td>SAP</td> <td>\$1,300,000</td> <td>\$1,300,000</td> <td>\$1,300,000</td> <td>\$1,300,000</td> </tr> <tr> <td>Oracle</td> <td>\$1,400,000</td> <td>\$1,400,000</td> <td>\$1,400,000</td> <td>\$1,400,000</td> </tr> </tbody> </table>	Vendor Name	Final Offer	Final Cost	Final Offer	Final Cost	Oracle	\$1,100,000	\$1,100,000	\$1,100,000	\$1,100,000	Microsoft	\$1,200,000	\$1,200,000	\$1,200,000	\$1,200,000	SAP	\$1,300,000	\$1,300,000	\$1,300,000	\$1,300,000	Oracle	\$1,400,000	\$1,400,000	\$1,400,000	\$1,400,000	<p><b>GIS Integration - Preliminary Findings</b></p>
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The examples above illustrate a typical set of major deliverables produced for an information system acquisition effort. The cost and resource models are based initially on an estimate of the solution. This estimate may be based on a bottom-up estimate based on the requirements, a top-down estimate, a parametric estimate based on similar systems, or any other means of itemizing and costing a reference system to be used for comparison of vendor offers and other alternatives for acquiring the system (for example, build vs. buy based on internal development estimates).

Once the initial vendor proposals are received, the technical proposals are evaluated against the published requirements using the scoring criteria. Vendors/alternatives may come in above or below the “should cost” estimate which serves as a reality check on the submitted costs. Specific differences in the technical, cost and resourcing proposals are then used as the basis for shortlisting the set of proposals/alternatives, formulating any requirements for demos / additional explanations that may be required, as well as for the development of negotiation strategies to maximize leverage with the final contenders. The scoring criteria and decision model are then used to rescore the Best and Final Offers for the shortlisted vendors and support the award decision.