



Exhibit B to Contract 24-03859

Info-Tech Research Group Inc.

Utah Transit Authority

Request for Proposal – Information Technology Research and
Advisory Services

24-03559RW

July 3rd, 2024.

Price Proposal - BAFO

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PRICE PROPOSAL
PART 6 – PRICING / COST

Info-Tech understands that UTA desires Ten (10) to Thirteen (13) seats with Info-Tech licenses. The terms for this contract will be a 3-year base with two (1)-year options for extension.

Info-Tech’s pricing proposal provides and fulfills UTA with all the requirements listed in 4.0 Scope of Services: Personalized Consulting Services, and Online Tools/Research Publications.

Info-Tech would like to honor UTA as long-standing members of Info-Tech, and to continue the partnership with UTA, Info-Tech is offering two (2) additional transition discounts of \$48,078.97 in year one, and a \$26,443.97 transition discount in year two. This is to assist with UTA’s budget for Info-Tech services through this future agreement.

Info-Tech’s proposal is good and firm for a period of ninety (90) days after the Deadline to Submit Proposals. Further, UTA can procure more licenses or services as required at any time.

Info-Tech Membership Proposal

Year 1:

1 x CIO Counselor Membership: \$101, 030.93 discounted = **\$50,656.01**

1 x Concierge Services: Included

1 x Industry Access: Included

1 x Onsite 5-day Workshop: Included

1 x Online 5-day Workshop: Included

1 x Counselor Membership: \$51,546.93 discounted = **\$22,578.46**

2 x Leadership Summit Tickets: Included

2 x Team Membership: \$8, 864.00 discounted = **\$6,137.80 for 2**

1 x Advisory Membership: \$28,350.52 discounted = **\$20,573.73**

15 x Reference Membership: \$0.00

Total Discounts: \$89,845.84.

Total: \$99,946.00

Year	Invoice Date	Invoice Amount	Term Start Date	Term End Date	Notes
1	July 31, 2024	\$99,946.00	July 31, 2024	July 31, 2025	Transition pricing discount provided of \$48,078.97
2	May 31, 2025	\$121,581.00	July 31, 2025	July 31, 2026	Transition pricing discount provided of \$26,443.97
3	May 31, 2026	\$148,024.97	July 31, 2026	July 31, 2027	
4	May 31, 2027	\$155,426.22	July 31, 2027	July 31, 2028	Option to exercise for year 4.
5	May 31, 2028	\$163,197.53	July 31, 2028	July 31, 2029	Option to exercise for year 5.

4.0 SCOPE OF SERVICES **ACCOUNT MANAGER:**

Your Dedicated Account Manager: Robert Webb

Robert Webb, Sr. Member Services Director, will be the main point of contact for UTA. Robert Webb brings 15+ years of experience in account management, client services, and business development. At Info-Tech, Robert Webb has had the opportunity to work with various client organizations, including both public and private financial organizations, as well as various government and transportation sectors. Robert's approach focuses on learning about the client's IT goals and ensuring that Info-Tech's service delivery is aligned to the client's vision and expectation.

Robert's experience in servicing IT organizations includes creating strategic roadmaps, defining the current and desired states of the client organization, determining required outcomes, and developing a plan of how Info-Tech will help the client achieve said outcomes. An important aspect of that work is collaborating with the client to understand what Info-Tech solution will address their needs in the most effective manner. Robert's main priorities in servicing UTA is to proactively engage with UTA members to forecast and identify future needs. As shown below, this is achieved through scheduling calls in advance, creating Customized Key Initiative Plan ("CKIP"), and being agile to the changing needs of UTA.

Robert's role will be focused on ensuring UTA receives the service required, while ensuring there is strategic alignment with UTA and the Info-Tech resource pool, including software, analytics, advisory, and tools and research. Robert will work to proactively engage UTA to forecast and identify future needs and liaise with other departments and internal teams at Info-Tech as necessary.

You learn more about Robert Webb's experience in her LinkedIn profile [here](#).

The Role of the Dedicated Account Manager

Robert will create a roadmap with you upon onboarding, setting standards for both parties as to the goals that UTA would like to achieve and challenges you'd like to manage throughout the membership term. Mark will work to continually increase business satisfaction with step-by-step roadmaps catering to core areas of IG, with timelines, and key stakeholders.

Robert's responsibility includes:

- Provide portal training to all Info-Tech users at the start of the membership, and regularly throughout the membership term.
- Assist you in navigating your membership and accessing membership services.
- Address any questions, requests, or concerns related to the membership, on-demand.
- Provide proactive support by conducting regular service calls, ensuring alignment and usage of the Info-Tech membership.
- Keep you updated on new materials, resources and services that become available, as well as upcoming events.

- Support cross-functional communication and collaboration between Info-Tech's Research and Delivery Teams.
- Continuously identify your service needs and ensure the membership is supporting them effectively.
- Solicit feedback to evaluate the success of our partnership and service delivery.
- Manage project documentation, scheduling, and continuity of service.

It is an Account Manager's responsibility to coordinate and steer external and internal stakeholders to project completion while adhering to the CKIP plan deadlines.

The process is outlined below:

Within first 30 days of membership activation:

- 1. Onboard all seat holders:**
 - a. Provide email to active membership and update password.
 - b. Reach out to set up a 1:1, to review website and membership details.
- 2. Onboard Leadership and/or Counsellor seat holders:**
 - a. Coordinate introductory call with Leadership holder and your dedicated Info-Tech Executive Counselor.
 - b. Facilitate introduction and book follow up call from first meeting.
 - c. Coordinate call for development of CKIP – Custom Key Initiative Plan.
 - d. Book Advisory calls as per Custom Key Initiative Plan.
 - e. Ensure case notes are complete as per CKIP requirements to ensure call accuracy.

Month over month:

- 3. Monthly touchpoints with members:**
 - a. Overview of the membership & usage.
 - b. Overview of current projects and current state.
 - c. Providing usage report for members.
 - d. Account Admin as required.
 - e. 30/60/90-day account health touchpoints to ensure customer satisfaction.
 - f. Gathering needs and scheduling any additional meetings as required.
 - g. Provide any relevant or timely information like research and tools that will aid in UTA's current situation.

Year over Year:

- 4. Contract renewal:**
 - a. Updating Contracts.
 - b. Coordinating Custom Key Initiative Plans discussions are booked with the Executive Counselor.
 - c. Responsible for ensuring entitlements are booked and utilized.
 - d. Responsible for overall account health.

- e. Responsible for ensuring concerns/complaints are handled in an efficient and timely manner.

We differentiate ourselves from other competitors in the marketplace in that Info-Tech takes our research and distills it down into actionable step-by-step blueprints to help organizations like UTA start and finish HR initiatives. Robert's responsibilities as your account manager are to keep the goals and needs of UTA as top priority; this includes sending and updating any information that is new or relevant to UTA members to aid in their current projects and challenges, as well as proactively forecast what is upcoming. This is done in an ongoing and consistent manner throughout UTA membership.

With our curated approach, we are the only vendor in the marketplace that offers tools and templates that focus on the practical application for IT research and actively customize them for your organization. We don't just provide the research; we give you a roadmap on how to do the work suggested in the research, thereby freeing up the time and effort it takes to do an implementation on your own.

In addition, Robert will actively schedule calls with subject matter experts to ensure they understand each step of the process and have the necessary tools and advice to successfully implement the changes. There is no more hunting for research and tools, Rober is there to guide, support, and facilitate the ease of managing through projects and challenges, as well as milestones and success.

Please see below for Info-Tech’s membership and value-added services descriptions.

SUBSCRIPTION TYPES

Membership Features	CIO Counselor Membership	Counselor Membership	Advisory Membership	Team Membership	Reference Membership
SERVICE DELIVERY					
Dedicated Executive Counselor	✓	✓			
Onsite or Virtual Counselor Working Sessions	4/year	1/year			
Custom Key Initiative Plan	✓	✓	✓		
ADVISORY SERVICES					
IT Cost Analysis & Optimization	✓**				
IT Spend & Staffing Benchmarking – Online*	✓**				
Expanded Industry Advisory Access	✓				
Concierge Services	✓	✓			
Software Selection as a Service	Unlimited	Unlimited	1/year		
Contract Review Service	Unlimited	Unlimited			
IT Vendor Price Benchmarking & Negotiations	4	2			
Analyst Calls	Unlimited	Unlimited	Unlimited		
Info-Tech LIVE Conference Ticket	2 Tickets	1 Ticket	1 Ticket		
RESEARCH CONTENT					
Industry Research	✓				
Technology Project Research	✓	✓	✓	✓	✓
IT Process Research	✓	✓	✓	✓	✓
People & Leadership Research	✓	✓	✓	✓	✓
Tools & Templates Library	✓	✓	✓	✓	✓
Software Selection Content	✓	✓	✓	✓	✓
DIGITAL EXPERIENCES					
Info-Tech Academy Training Platform	✓	✓	✓	✓	✓
Leadership Development Program	✓	✓	✓	✓	
IT Diagnostic & Benchmarking Programs	✓	✓	✓		
IT Metrics Dashboard	✓	✓	✓		
Industry Roundtable – Virtual	✓	✓	✓		
360 Feedback Tool	✓				

** These offerings can be substituted individually for 1 standard workshop each OR together for 1 enterprise workshop.

SERVICE DELIVERY	
Dedicated Executive Counselor	Members receive personalized and confidential one-on-one support from a seasoned IT executive to achieve their personal/organizational goals, grow as a leader, and prepare for the next chapter of their career.
Onsite Counselor Visits	The Executive Counselor will travel to the member’s location throughout the year to spend the day working through the member’s agenda. The Counselor will address the member’s top personal and organizational challenges, presenting relevant research and conducting working sessions.
Executive Advisor	Executive Advisors provide quarterly strategy planning support calls to members to help curate membership content and ensure they succeed on their initiatives.
Custom Key Initiative Plan	A fully customized plan of the member’s top three to five initiatives mapped to all relevant Info-Tech content and experiences to assist with execution and ensure success.
ADVISORY SERVICES	
IT Cost Analysis & Optimization or Onsite Workshop	The IT Spend & Staffing Benchmarking report is used to further investigate potential areas of spend and staffing optimization and form a roadmap to optimize IT spend and staffing within the organization. Option to substitute for a standard onsite workshop.
IT Spend & Staffing Benchmarking – Online	Info-Tech experts accurately map the member’s IT spend and staffing and benchmark against industry peers to build a comprehensive report detailing IT spend and staffing along four perspectives: Expense, Service, Business, and Innovation. Option to substitute for a standard online workshop.
Industry Advisory Access	Unlimited phone access to our team of industry experts to guide the member through our industry research and provide insights into the specific trends and challenges of our members’ industries.
Concierge Services	A powerful set of over 20 high-impact single-day consulting engagements designed to be delivered online or onsite.
Software Selection as a Service	Five advisory calls over a five-week period to accelerate and improve the member’s software selection process.
Contract Review Service	Access to our IT contract experts, who will conduct a business review of the Terms & Conditions and provide a comprehensive written summary of feedback.
IT Vendor Price Benchmarking & Negotiation	Access to our IT pricing experts and exclusive negotiation intelligence to achieve best-in-circumstance deals on contracts valued over \$1 million, covering over 40 major IT vendors.
Analyst Calls	Unlimited phone access to our team of subject matter experts to guide the member through their most challenging technology projects. An analyst from the team who wrote the research works with the member at key project milestones to advise, coach, and offer insights.
Info-Tech LIVE Conference Ticket	Access to Info-Tech’s premier conference experience with insightful keynotes, practical breakout sessions, and one-on-one analyst experiences.
RESEARCH CONTENT	
Industry Research & Benchmarking	In-depth industry-specific research content that includes benchmarking reports, trends analysis, technology evaluations, and reference architectures.
Technology Project Research	Over 700 do-it-yourself project blueprints to help our members save time and money when executing their most critical IT initiatives.
IT Process Research	A comprehensive and connected set of 45 project methodologies and best practices for improving and optimizing core IT processes.
People & Leadership Research	Strategies on how to lead teams effectively and resources proven to help you become a better manager.
Tools & Templates Library	Members save time creating critical IT documents and project deliverables with our massive, ready-to-deploy library of over 1,000 tools and templates.
Software Selection Content	SoftwareReviews provides vendor evaluations and rankings reports that aggregate feedback from real IT professionals and business leaders.
DIGITAL EXPERIENCES	
Info-Tech Academy Training Platform	An online learning management platform with 100+ hours of video content, 50+ quizzes, and 9 certification programs.
Leadership Development Program	An online or in-person leadership program focused on improving decision making and people-management skills for high-potential staff.
IT Diagnostic & Benchmarking Programs	Over 20 prebuilt survey programs to ask business and IT stakeholders insightful questions and convert their responses into reports that help IT departments make critical decisions.
IT Metrics Dashboard	An online portal for collaboratively collecting, managing, and communicating success on key IT metrics and projects.
Industry Roundtable – Virtual	Access to regular virtual industry roundtable discussions and peer networking to explore common challenges, share best practices, and help shape our industry research agenda.
360 Feedback Tool	An easy-to-use, customizable employee feedback tool to give IT leaders a multifaceted evaluation across their key competencies.

CIO COUNSELOR MEMBERSHIP

The CIO Counselor Membership is our premier membership designed to help CIOs deliver results and improve their effectiveness as a leader. It includes all available content and access to services at Info-Tech. A table of membership features is provided on page 7.

We collaborate with clients through our Counselor Services to gain consensus on their priorities and develop and execute personalized plans for success. Leveraging Info-Tech’s research and best practices, we provide consultative advisory services and executive coaching.

Info-Tech Research Group’s CIO Counselor membership provides privileged access to an executive partner (“Counselor”) who has deep domain knowledge and focuses 100% of their time on ensuring client value throughout the term of the subscription. Your Counselor will schedule monthly advisory sessions and be available on demand when you and your delegate need advice and counsel. Four one-day onsite strategy meetings are included. Typically, these full-day sessions are delivered on a quarterly basis.

CIO COUNSELOR MEMBERSHIP

The CIO Counselor is our premier membership designed to help CIOs in larger, complex organizations deliver results and improve their effectiveness as a leader. It includes all available content and services and is the best way to experience Info-Tech.

Service Delivery

Dedicated Executive Counselor

Members receive personalized and confidential one-on-one support from a seasoned IT executive to achieve their personal/organizational goals, grow as a leader, and prepare for the next chapter of their career.

Also Includes:

- 4 Onsite Counselor Visits
- Custom Key Initiative Plan
- Designated Account Manager

Advisory Services

IT Spend & Staffing Benchmarking – Online

Info-Tech experts accurately map and benchmark your IT spend and staffing against industry peers, to build a comprehensive report detailing IT spend and staffing along four perspectives: Expense, Service, Business, and Innovation.

IT Cost Analysis & Optimization

Leverage the IT Spend & Staffing Benchmarking report to identify IT cost optimization initiatives and build an IT cost optimization strategy and a 12-month roadmap. Pre-requisite service: IT Spend & Staffing Benchmarking. Option to substitute for a standard workshop.

Unlimited Analyst Calls

Unlimited phone access to our team of subject matter experts to guide you through your most challenging technology projects. An analyst from the team who wrote the research works with the member at key project milestones to advise, coach, and offer insight.

Industry Research & Advisory

In-depth, industry-specific research content and advisory service that includes benchmarking reports, trends analysis, technology evaluations, and reference architectures.

IT Vendor Price Benchmarking & Negotiation

Access to our IT pricing experts and exclusive negotiation intelligence to achieve best in circumstance deals on \$1M+ contract value covering 40+ major IT Vendors. Up to 4 contracts included with membership.

Also Includes:

- Concierge Services
- Software Selection as a Service
- Contract Review Service
- Two Info-Tech LIVE Tickets

Research Content

Project Blueprints

Over 450 step-by-step project methodologies to help members execute technology projects and improve core IT processes.

Tools & Templates Library

Over 1,000 ready-to-deploy tools and templates to save members time creating critical IT documents and project deliverables.

Software Selection Content

SoftwareReviews vendor evaluations and rankings reports that aggregate feedback from real IT professionals and business leaders.

Premium Industry Content

In-depth, industry-specific research content that includes benchmarking reports, trends analysis, technology evaluations, and reference architectures.

Also Includes:

- People & Leadership Research



Sample Key Initiative Plan



Sample Template



Sample Data Quadrant Report



Sample Industry Content

Digital Experiences

IT Diagnostic Programs

Over 11 prebuilt survey programs to ask business and IT stakeholders insightful questions and convert their responses into reports that help IT departments make critical decisions.

Also Includes:

- Info-Tech Academy Training Platform
- IT Metrics Dashboard
- Leadership Development Program
- 360-Degree Feedback Tool



Sample Diagnostic Report



Sample Video Content

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COUNSELOR MEMBERSHIP

Info-Tech Research Group will provide access to Counselor memberships to the CTO-level executives and those of similar duties at UTA. The deliverables for a Counselor membership are noted within the chart on page 7.

The Counselor membership will receive unlimited access to core research (both tactical and strategic). Our analysts publish content on project-based initiatives but also write trend reports, industry coverage, and software reviews that tackle emerging technologies and innovative practices that CIOs and IT executives are most interested in and need to understand to do their jobs effectively.

Your Counselor will schedule monthly advisory sessions and be available on demand for when you and your delegate need advice and counsel. One full-day onsite strategy meeting is included at your location.

Please see the graphic below for a full description of all services included within Info-Tech’s Counselor membership.

COUNSELOR MEMBERSHIP

The Counselor membership is designed to improve the maturity of IT and develop CIOs and IT leaders with expert guidance complemented by robust services, research, tools, and resources. It includes our most popular content and services to execute key initiatives.

Service Delivery

Dedicated Executive Counselor

Members receive personalized and confidential one-on-one support from a seasoned IT executive to achieve their personal/organizational goals, grow as a leader, and prepare for the next chapter of their career.

Also Includes:

- 1 Onsite Counselor Visits
- Custom Key Initiative Plan
- Designated Account Manager



Sample Key Initiative Plan

Advisory Services

Software Selection as a Service

Five advisory calls over a five-week period to accelerate and improve the member’s software selection process.

Unlimited Analyst Calls

Unlimited phone access to our team of subject matter experts to guide you through your most challenging technology projects. An analyst from the team who wrote the research works with the member at key project milestones to advise, coach, and offer insight.

Contract Review Services

Access to our IT contracts experts who will conduct a business review of the Terms & Conditions and provide a comprehensive written summary of feedback.

IT Vendor Price Benchmarking & Negotiation

Access to our IT pricing experts and exclusive negotiation intelligence to achieve best in circumstance deals on \$1M+ contract value covering 40+ major IT Vendors. Up to 2 contracts included with membership.

Also Includes:

- Info-Tech LIVE Ticket

Research Content

Project Blueprints

Over 450 step-by-step project methodologies to help members execute technology projects and improve core IT processes.

Tools & Templates Library

Over 1,000 ready-to-deploy tools and templates to save members time creating critical IT documents and project deliverables.



Sample Template

Software Selection Content

SoftwareReviews vendor evaluations and rankings reports that aggregate feedback from real IT professionals and business leaders.

People & Leadership Research

Strategies on how to lead teams effectively and resources proven to help you become a better manager.

Also Includes:

- IT Process Research



Sample Data Quadrant Report

Digital Experiences

IT Diagnostic Programs

Over 11 prebuilt survey programs to ask business and IT stakeholders insightful questions and convert their responses into reports that help IT departments make critical decisions.



Sample Diagnostic Report

Info-Tech Academy Training Platform

An online learning management platform with 100+ hours of video content, 50+ quizzes, and 9 certification programs.

Also Includes:

- IT Metrics Dashboard
- Leadership Development Program



Sample Video Content

ADVISORY MEMBERSHIP

The Advisory membership is designed to help IT leaders and managers complete projects and improve processes by leveraging our team of expert analysts and world-class research. It includes our basic content and services and is a great way for IT employees to experience and leverage the core services of Info-Tech.

Info-Tech Research Group has proposed an Advisory membership to address the requirements of the next tier of IT leaders within UTA. Please see table on page 7 for an overview of deliverables available.

As part of the Advisory membership, we will help build a Key Initiative Plan. The Key Initiative Plan helps focus attention on projects that matter most. All plans are customizable to the needs of UTA. Each role will receive a dedicated Executive Advisor to go through each major project or process with a step-by-step methodology.

ADVISORY MEMBERSHIP

The Advisory membership is designed to help IT leaders and managers complete projects and improve processes by leveraging our team of expert analysts and world-class research. It includes our basic content and services and is a great way for IT employees to experience and leverage the core services of Info-Tech.

Service Delivery

Executive Advisor

Executive Advisors provide quarterly strategy planning support calls to members to help curate membership content and ensure they succeed against their initiatives.

Also Includes:

- Custom Key Initiative Plan
- Designated Account Manager



Sample Key Initiative Plan

Advisory Services

Software Selection as a Service (1/year)

Five advisory calls over a five-week period to accelerate and improve the member's software selection process.

Unlimited Analyst Calls

Unlimited phone access to our team of subject matter experts to guide you through your most challenging technology projects. An analyst from the team who wrote the research works with the member at key project milestones to advise, coach, and offer insight.

Also Includes:

- Info-Tech LIVE Ticket

Research Content

Project Blueprints

Over 450 step-by-step project methodologies to help members execute technology projects and improve core IT processes.

Tools & Templates Library

Over 1,000 ready-to-deploy tools and templates to save members time creating critical IT documents and project deliverables.

Software Selection Content

SoftwareReviews vendor evaluations and rankings reports that aggregate feedback from real IT professionals and business leaders.

People & Leadership Research

Strategies on how to lead teams effectively and resources proven to help you become a better manager.

Also Includes:

- IT Process Research



Sample Template



Sample Data Quadrant Report

Digital Experiences

IT Diagnostic Programs

Over 20 prebuilt survey programs to ask business and IT stakeholders insightful questions and convert their responses into reports that help IT departments make critical decisions.



Sample Diagnostic Report

Info-Tech Academy Training Platform

An online learning management platform with 100+ hours of video content, 50+ quizzes, and 9 certification programs.

Industry Roundtable – Virtual

Access to monthly virtual industry roundtable discussions and peer networking to explore common challenges, share best practices, and help shape our industry research agenda.

Also Includes:

- IT Metrics Dashboard
- Leadership Development Program



Sample Video Content

Info-Tech Research Group

TEAM MEMBERSHIP

Please see table on page 7 for an overview of deliverables available.

The Team membership includes the following:

- Individual role-based access to all research and project methodologies.
- Access to Info-Tech Academy online platform.

Team membership is not sold separately and may only be purchased as part of a Bundle of Products (a Bundle of Products is defined as the purchase of two or more products). It must be purchased within a bundle or combination of products that, at a minimum, includes at least one Advisory membership or any one of the Counselor-level memberships.

TEAM MEMBERSHIP

The Team membership is our basic membership designed to help IT managers and employees execute on projects and improve processes with world-class research, tools, and templates. It includes the core research product and is a great way to become familiar with Info-Tech.

Service Delivery

Account Manager

Your Account Manager will ensure you get the most value from your membership by helping you understand your entitlements and the resources that you can leverage to help you excel in your role.

Research Content

Project Blueprints

Over 450 step-by-step project methodologies to help members execute technology projects and improve core IT processes.

Tools & Templates Library

Over 1,000 ready-to-deploy tools and templates to save members time creating critical IT documents and project deliverables.

People & Leadership Research

Strategies on how to lead teams effectively and resources proven to help you become a better manager.

IT Process Research

A comprehensive and connected set of 45 project methodologies and best practices for improving and optimizing core IT processes.

Software Selection Content

SoftwareReviews vendor evaluations and rankings reports that aggregate feedback from real IT professionals and business leaders.

Digital Experiences

Leadership Development Program

An online or in person leadership program focused on improving decision-making and people-management skills for high-potential staff.

Info-Tech Academy Training Platform

An online learning management platform with 100+ hours of video content, 50+ quizzes, and 9 certification programs.

REFERENCE MEMBERSHIP

The Reference membership includes the following:

- Individual role-based access to all research and project methodologies.
- Access to Info-Tech Academy online platform.

Reference membership is not sold separately and may only be purchased as part of a Bundle of Products (a Bundle of Products is defined as the purchase of two or more products). It must be purchased within a bundle or combination of products that, at a minimum, includes at least one Advisory membership or any one of the Counselor-level memberships.

Service Delivery

Account Manager

Your Account Manager will ensure you get the most value from your membership by helping you understand your entitlements and the resources that you can leverage to help you excel in your role.

Research Content

Project Blueprints

Over 450 step-by-step project methodologies to help members execute technology projects and improve core IT processes.

Tools & Templates Library

Over 1,000 ready-to-deploy tools and templates to save members time creating critical IT documents and project deliverables.

People & Leadership Research

Strategies on how to lead teams effectively and resources proven to help you become a better manager.

IT Process Research

A comprehensive and connected set of 45 project methodologies and best practices for improving and optimizing core IT processes.

Software Selection Content

SoftwareReviews vendor evaluations and rankings reports that aggregate feedback from real IT professionals and business leaders.

See the following pages for descriptions of our value-added services.

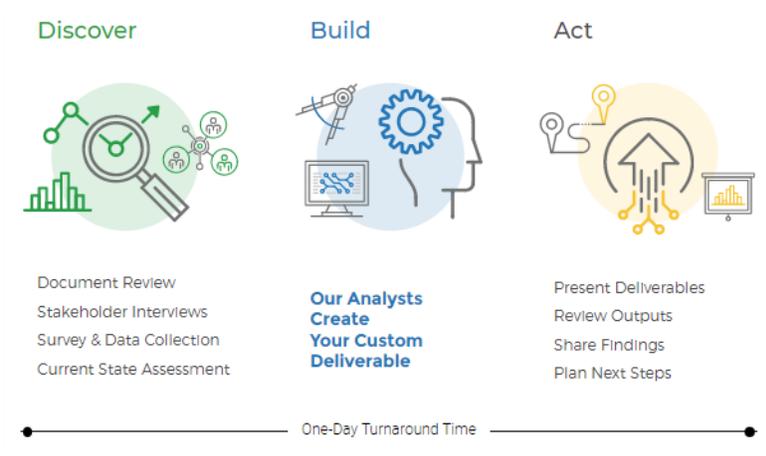
VALUE-ADDED SERVICES

In this section, Info-Tech will describe the different types of value-added services we provide our members that will be available within certain memberships or can be purchased as add-ons:

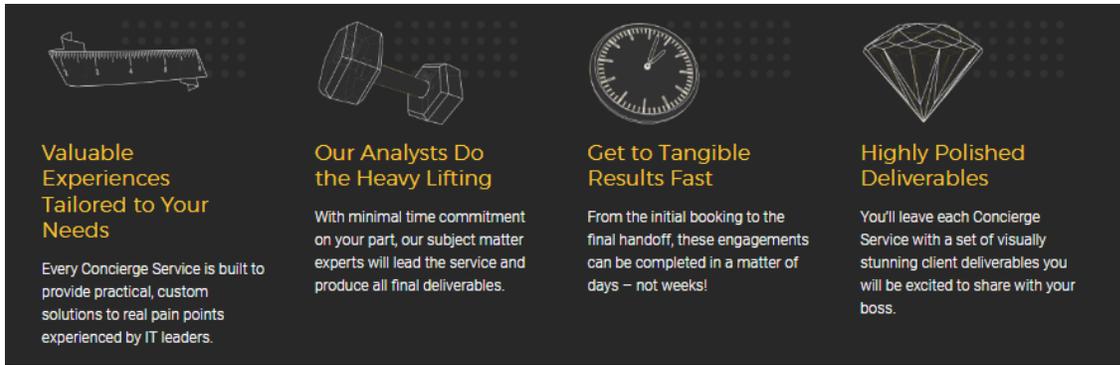
- Research analyst onsite to provide presentations and facilitated sessions.
- Pre-recorded media or presentations.
- Webinar briefings and presentations.
- Executive support – access for UTA executives to national-level governmental IT executive forums and peer groups to promote understanding of IT-related issues.
- Shared resources across the enterprise.
- Analyst or subject matter expert presentations via conferences, workshops, seminars, etc., with corresponding documentation made available after completion of session.
- Research analyst online briefings, podcasts, and webinars.

Concierge Services

UTA’s CIO, Executive, and Technical Counselor members will receive access to our Concierge Services: a powerful set of over 20 high-impact, single-day consulting engagements designed to be delivered online or onsite.



Our Concierge Services are designed with the client’s needs in mind first, and we provide valuable experiences tailored to those specific needs. Every Concierge Service is built to provide practical, custom solutions to real pain points experienced by IT leaders. Our analysts will do all the heavy lifting with minimal time commitment on your part. Our subject matter experts will lead the service and produce all final deliverables; we ensure that you will get tangible results fast. From the initial booking to the final handoff, these engagements can be completed in a matter of days. Finally, we provide highly polished deliverables that are ready to use. You will leave each Concierge Service with a set of visually stunning deliverables you will be excited to share and present across the company.



Contract Reviews

Info-Tech knows that ill-defined terms and weak vendor relationships lead to overspending on contracts. To avoid that, an IT organization needs proven processes to get the right contracts for the organization while building better vendor relationships. Info-Tech equips our clients with the expert advice and tools required to accomplish this goal by:

- Knowing the market competitive price for software that is being purchased.
- Managing annual maintenance costs.
- Improving organizations' contract negotiation skills.
- Optimizing contract language to meet specific organizational requirements.
- Developing a clear understanding of contract terms and conditions.

Info-Tech has helped thousands of members negotiate contracts with their vendors. What we have learned along the way provides significant advantages to our clients, enabling them to:

- Pay less than other purchasers by understanding the competitive price landscape.
- Realize significant savings by optimizing contract terms.
- Right-size contracts to purchase only what is needed, which helps avoid penalties and unforeseen costs.
- Future-proof the organization by building protections into contract terms to avoid price increases.
- Maintain a competitive edge by learning how to regularly review and update contracts.

SoftwareReviews

Info-Tech provides a best-in-class [SoftwareReviews program](#) where real end users provide their feedback on their software experiences. Info-Tech creates a report on solutions within a particular software category (e.g. CRM). Our process eliminates any bias toward vendors and provides real-time data to allow our clients to make informed business decisions based on peer reviews.

Industry Research

Explore deep vertical research to gain tailored insights into your industry. New Info-Tech Industry Benchmarking and Roundtables will be available to UTA per the membership levels

proposed. For a deeper dive into industry strategies, trends, technologies, and benchmarking, UTA will have access to the industry-specific content offered by our government and transportation research and advisory services, as well as access to the full library of industry research, which covers fifty-six industry categories. Connect with industry IT leaders and peers in regular collaboration sessions to tackle pressing industry issues.



Diagnostic Tools

Info-Tech’s Diagnostic & Benchmarking programs enable our members to collect the data they need to make key IT decisions. Info-Tech’s services include these programs throughout the term of the contract, targeted toward the IT business heads and senior leaders.

With data from over 40,000 business leaders, we understand what activities correlate with high IT performance and can help you successfully complete these activities in your own organization.

Unlimited access to Diagnostic & Benchmarking programs is available with advisory and above Info-Tech memberships. This is a key differentiator of our service offering and a value-added service for UTA.

Info-Tech has 11 diagnostic tools that are available for UTA. See the graphic below for the diagnostics we offer.



CIO Business Vision

Stakeholder management is a critical aspect of running a successful IT department. Info-Tech's CIO Business Vision program is a low-effort, high-impact program that will give you detailed report cards on the organization's satisfaction with IT's core services.

Use these insights to understand your key business stakeholders, find out what is important to them, and improve your interactions. The CIO Business Vision survey is administered by our research team upon request. The valuable statistics you will receive from this survey include stakeholder satisfaction metrics, IT capacity metrics, and departmental metrics including stakeholder feedback reports. This survey creates value by enabling you to:

1. Plan your stakeholder strategy with Info-Tech.
2. Build consensus and accountability within IT.
3. Brief critical stakeholders within COMPANY NAME's members.
4. Build relationships with key decision makers.
5. Create company and business unit action plans.

Please review the following sample report: [Sample Report – CIO Business Vision.pdf](#)

CEO-CIO Alignment Program

Info-Tech encourages IT leaders to take advantage of this program at the beginning of the membership so we can effectively set up an engagement plan over the course of the year that will provide the most value to your department and the organization. For decades, IT-business alignment has been recognized as a critical factor for effective IT. Yet many IT leaders are still without the tools they need to understand and support business priorities.

Decipher business needs by understanding the perspective of the CEO or head of the business. Automate IT-business alignment so IT can operate effectively and generate tangible value for your business.

As leader of an IT department, you recognize that your ideas, priorities, and perspectives differ from those of other business leaders. This program eliminates the guesswork and starts closing the gaps between these perspectives.

The CEO-CIO Alignment program is the first step to building IT-business alignment that optimizes IT and drives business value. You will receive a report with insights from the survey that will help your IT division achieve the following:

- Understand the business head's perception of and vision for IT in your business.
- Identify and build core IT processes that automate IT-business alignment.
- Create a plan to address alignment gaps impeding business growth.
- Deliver your plan to demonstrate IT value and progress.

Please review the following sample report: [CEO-CIO Alignment Report](#)

IT Management & Governance Diagnostic

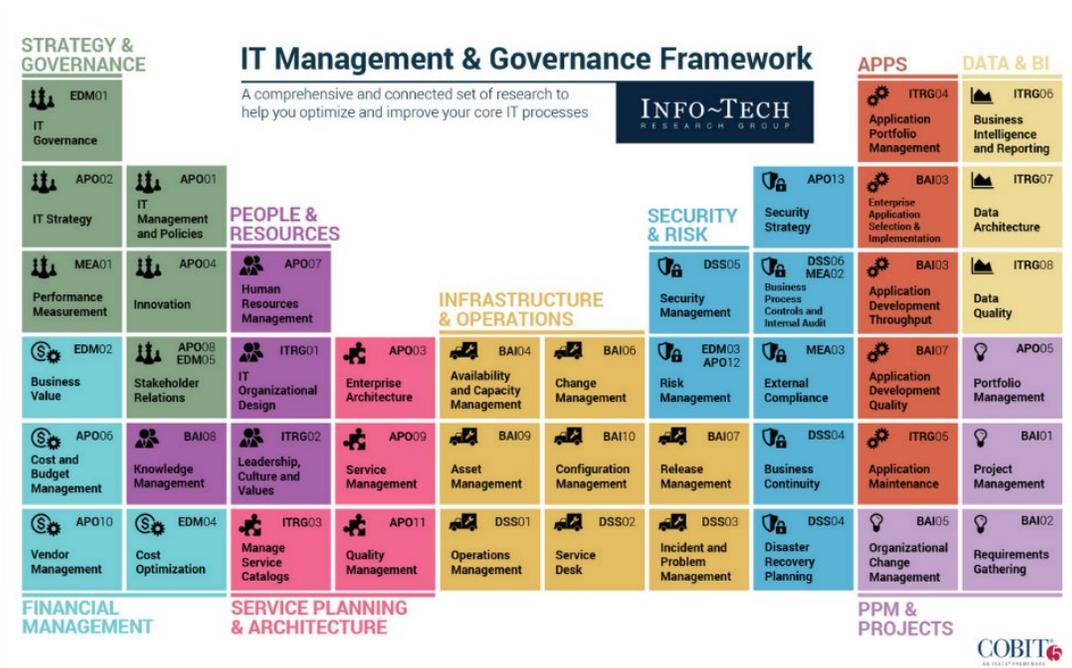
Info-Tech’s IT Management & Governance Diagnostic is an innovative program available to UTA’s members. This diagnostic allows IT executives to understand their team’s perception of the importance and effectiveness of their technology processes. It will aid in building consensus around which processes are important or ineffective by conducting an IT team alignment exercise.

This program enables the IT team to create a customized process improvement roadmap to maximize impact and focus time and resources more efficiently and accurately.

There are four key steps that will guide you through the program to optimize your IT processes:

1. **Map Your Process Landscape:** Determine which processes your team believes need more attention so that you can effectively allocate your time and resources across all process initiatives. Understand what your next steps should be for each of the processes in your organization based on the feedback received from your entire team.
2. **Process Spotlight:** Dive deeper into each process and its performance. Highlight contentious areas and understand how aligned your team is for each process.
3. **Team Alignment:** Use the results to facilitate a team alignment exercise with your team. Prioritize your team’s process improvement efforts by getting opposing views on the table and reconciling the differences to build consensus.
4. **Ownership & Accountability:** Assign process ownership and hold team members accountable for process improvement initiatives to ensure successful implementation and to realize the benefits from more effective processes.

Info-Tech uses a heatmap-style graphic to identify the effectiveness and relative importance of each IT process. The processes below align with the COBIT 5 framework of IT processes:



The above executive benchmarking and diagnostic programs are typically run on an annual basis to measure performance year over year. Our clients regularly improve scores and make measurable action plans. We suggest running these diagnostic and benchmarking programs toward the beginning of the membership to strategically align our services to meet the needs of your key business stakeholders.

Additional IT function diagnostic programs that can be used by UTA's Advisory and Team members include:

- [IT Security Diagnostic](#): The IT Security Diagnostic program is a low-effort, high-impact program designed to help IT security leaders assess and improve their security practices. Gather data and report on IT security governance, business satisfaction, and effectiveness to understand where you stand and how you can improve.
- [Application Portfolio Assessment](#): Application portfolio management requires an in-depth understanding of how end users feel about IT software. Develop data-driven insights to help you decide which applications to retire, upgrade, retrain on, or maintain to meet the demands of the business.
- [End User Satisfaction](#): Service optimization is nearly impossible to perform without an honest and thorough understanding of end-user sentiment toward IT services and software.
- [Data Quality Scorecard](#): Our comprehensive report shows you how the business feels about data quality and what the most pressing issues are. Use the feedback to guide improvement efforts and develop a focused action plan.
- [Project Portfolio Management Diagnostic Program](#): The Project Portfolio Management Diagnostic program is a low-effort, high-impact program designed to help project owners assess and improve their PPM practices. Gather and report on all aspects of your PPM environment to understand where you stand and how you can improve.

Tools, Toolkits, and Templates

Info-Tech will provide UTA's members with unlimited access to core research and downloadable resources, many of which are fully customizable, via our online research portal. Resources include (but are not limited to) the following formats:

- Microsoft Word documents.
- Microsoft PowerPoint documents.
- Microsoft Excel documents.
- Infographics.
- Videos.
- Recorded webinars.
- SoftwareReviews Data Quadrant and Emotional Footprint reports.
- Other SoftwareReviews resources and graphs.
- Customizable benchmarking tools.
- Online portal certification programs.

- Policy Template Access.
- Final PDF reports in a boardroom-ready format, customized specifically to UTA's requirements.

Talent Leadership Research and Learning Academy

UTA's members will have full access to all programs (events, leadership development programs, and webinars) and best-practice content to not only complete projects but also develop as IT professionals. One of the main benefits of using IT research and advisory services is understanding how industry peers are addressing their initiatives and having the resources to tackle new challenges.

Info-Tech provides an entire research silo related to [Talent Leadership & Management](#) research specifically targeted to improve your organization's strategies for leading your IT team effectively. We provide proven resources that will help your team become better managers.

In addition, Info-Tech Academy enables your staff to receive training in the 45 core IT processes (based on COBIT). Nine certificates are available and can be achieved by completing the outlined solution sets for each process. We understand that IT departments struggle to develop their staff. This is a unique opportunity to increase the use and value of our IT research service. Each topic is accompanied by webinars and videos with our subject matter experts and IT members.

For example, the Data & BI Certificate includes the following courses:

- Business Intelligence & Reporting
- Data Architecture
- Data Quality

The courses include a combination of videos, research, and activities. This is a great opportunity for your members to learn and develop as well as train direct reports and colleagues more effectively in these areas. Access to the program and related online research is unlimited for all IT staff at UTA. Each of the designated members can assign courses from the 45 core IT processes to their staff at any level.

Info-Tech LIVE

Info-Tech LIVE 2023, the three-day hands-on conference, has wrapped/is available to register for online. The authoritative voice for IT executives making technology decisions and influencing IT innovation, LIVE is your front-row seat to the future of IT with a focus on real, everyday challenges, ensuring that all attendees are engaged, productive, and challenged throughout each session. We've given our members access to all last year's keynotes so you can relive the excitement and revisit the content at your convenience.

IT Spend & Staffing Benchmarking Service

Info-Tech helps members optimize IT spend and staffing through mapping your IT spend and staffing data to a best-practice model, benchmarking against industry peers, and building a roadmap of next steps.

IT Spend & Staffing Benchmarking	IT Cost Analysis & Optimization
<ul style="list-style-type: none"> ✔ Info-Tech experts accurately map your IT spend and staffing, providing full transparency into business consumption of IT ✔ Info-Tech will cover spending information from a single general ledger extract ✔ Service covers commercial organizations with revenues under \$1 billion or public institutions with budgets under \$1 billion ✔ Benchmarking of IT spend and staffing against your industry peers ✔ Detailed review of your results and recommendations on optimization ✔ Comprehensive report detailing your IT spend and staffing along four perspectives: Expense, Service, Business, and Innovation ✔ Equivalent to and interchangeable with Info-Tech online workshop product 	<ul style="list-style-type: none"> ✔ Prerequisite: IT Spend & Staffing Benchmarking ✔ Info-Tech experts use the information provided in your IT Spend & Staffing Benchmarking report to further investigate, with you, potential areas of spend and staffing optimization ✔ We identify and evaluate the cost impact of multiple initiatives around: <ul style="list-style-type: none"> • Workforce productivity • Asset efficiency • Vendor partnership reinforcement • Project prioritization ✔ Service covers commercial organizations with revenues under \$1 billion or public institutions with budgets under \$1 billion ✔ We build, with you, a roadmap to optimize IT spend and staffing within your organization, in line with business objectives and projections ✔ We advise you on a change management strategy to successfully implement your roadmap ✔ Equivalent to and interchangeable with Info-Tech workshop product

Info-Tech Workshops

Info-Tech’s workshops are proven and road-tested methodologies to accelerate timelines and make major project decisions, facilitate productive conversations with key stakeholders, and leverage Info-Tech’s experience and expertise as well as client examples to ensure project success and sustained organizational support.

Each Info-Tech workshop is accompanied by supporting deliverables to help you accomplish your goals. After every workshop, Info-Tech will provide the leadership team with a final report and associated tools and templates and will work with you to identify next steps and supporting research and advisory services available to you through your membership.

Over the course of five days, our expert facilitators help you complete a key initiative, work through critical project deliverables, and train your team. We use a learning-based approach to implement Info-Tech methodologies tailored to your unique situation.

Why Workshops?

- Get 90% of any project done in five days of intense and focused work designed to collapse project timelines and make project decisions.
- Use our proven methodologies to get your project done quickly and effectively.

Proven Results:

- Since launching the product, Info-Tech has delivered over 4292 workshops (onsite and online) with an overall satisfaction rating of 9.4/10.

- 96% of workshop participants rate the effectiveness of the expert facilitators at an 8 out of 10 or higher.
- On average, workshops save our members **\$132, 882** per five-day engagement.

Info-Tech offers our members standalone workshops and subscription-level workshops, which can be delivered onsite or online.

Online Standard Workshop	Online Enterprise Workshop
<ul style="list-style-type: none"> ✓ Five-day Online Workshop to solve your most pressing problem ✓ Expert facilitators help you complete a key initiative, work through critical project deliverables, and train your team ✓ Follows the rigorous methodology of our blueprints 	<ul style="list-style-type: none"> ✓ 5-day customizable Workshop to solve your most pressing problem ✓ 7 days of effective effort by Info-Tech ✓ Expert facilitators help you complete a key initiative, work through critical project deliverables, and train your team ✓ Industry specialist available to ensure that the workshop deliverable is tailored for your business and industry ✓ Final deliverable includes a boardroom ready executive presentation

License Model, Sharing, and Usage Rights

The following usage rights are permitted:

- Licenses can be reassigned at any time during the term of the subscription.
- Research can be shared internally with both members and non-members.
- The senior IT leaders with analyst access can include other staff members on phone calls as needed throughout the term of the subscription.
- Downloaded research can be used perpetually even if the contract term expires.
- There are no limits on the number of phone consultations with a subject matter on one topic.
- Calls are one hour versus the traditional 30 minutes with other vendors.
- There is no maximum on the number of concurrent users or number of downloads.

Scheduling a call with an Analyst, Advisor, or Account Manager.

There are 3 distinct options for scheduling a call/video chat with our team members:

1. Via call or email to member’s account manager.
2. Via “Book Analyst Call” within a blueprint.
3. Via “Schedule your Call” within a blueprint’s guided implementation section.

Option 1:

Account Manager: to schedule a call with your account manager, a phone call to their extension, or an email is the simplest and easy way to book time via phone, or MS Teams.

Analyst, Advisor, or Counselor: Members can schedule calls with Analysts, Advisors, or Counselors by booking through their account manager, either via email or phone.

Option 2:

Within every blueprint, members will find a “Book Analyst Call” green button to schedule a call.

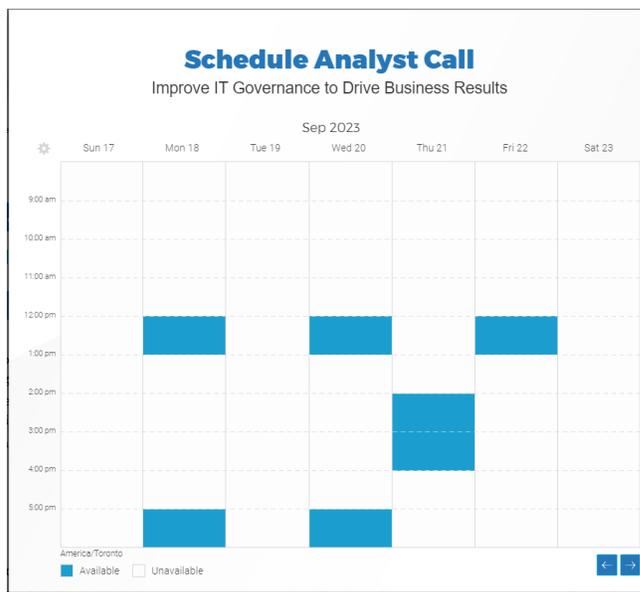
Improve IT Governance to Drive Business Results

Avoid bureaucracy and achieve alignment with a minimalist approach.

 **Download Research**
 **Book Analyst Call**
Included in your membership
 **Book a Workshop**
What is a Workshop?

- ▶ IT governance is the number-one predictor of value generated by IT, yet many organizations struggle to organize their governance effectively.
- ▶ Current IT governance does not address the changing goals, risks, or context of the organization, so IT spend is not easily linked to value.
- ▶ The right people are not making the right decisions about IT.

Upon clicking the green “Book Analyst Call” button, a calendar will appear allowing the member to book a time that is available and most convenient for them.



Option 3: On that same page as shown above, members can also schedule a call through the blue “Schedule your Call” button in the Guided Implementation section.

**Need Extra Help?
Speak With An Analyst**

Get the help you need in this 4-phase advisory process. You'll receive 9 touchpoints with our researchers, all included in your membership.

Guided Implementation 1:
Align IT with the business context

Call 1: Move towards gaining buy-in from the business if necessary. Then identify the major components of the SoBC.

Call 2: Review SoBC and discuss a strategy to engage key stakeholders in the redesign.

Guided Implementation 2:
Assess the current governance framework

Call 1: Explore the process of identifying the four major elements of governance. Build guidelines for the future state.

Call 2: Review the current state of governance and discuss the implications and guidelines.

Guided Implementation 3:
Redesign the governance framework

Call 1: Identify the changes that will need to be made.

Call 2: Review redesigned structure and authority.

Call 3: Review redesigned process and membership.

Guided Implementation 4:
Implement governance redesign

Call 1: Discuss and review the implementation plan.

Call 2: Prepare the presentation for the executives. Provide support on any final questions.

Schedule Your Call

Upon clicking the blue “Schedule Your call” button, a prompt will appear allowing you to select your time and date that works for you.

Book an Appointment

IT Research & Advisory Services

Select a date and time to speak with one of our analysts.

Book an Appointment

Tuesday ▼ Wednesday ▼ Thursday ▼

Step 3: An alert will be triggered internally and the meeting via MS Teams will be scheduled. Confirmation will be sent to your email from one of our subject matter experts.

The Research Methodology

The research methodology at Info-Tech has a single, overarching goal: *Provide practical deliverables that save the client effort and deliver extraordinary value.* To accomplish this goal, we segment our research methodology into three phases: **Agenda Planning** (topic selection), **the Research Process** (research creation), and **Measuring Research Usage and Value.**

Agenda Planning

Info-Tech has a quarterly and annual research agenda to enable our team to focus on top-priority projects and address the topics that surface from our members throughout the year.

We start with an agenda planning process, a three-month full-time continuous process that helps select projects that real clients need to execute as part of their daily jobs. Selecting these projects involves soliciting and incorporating client feedback, crowdsourced topics from analysts and salespeople, competitive intelligence, and practical value-driven analysis. As the fastest growing and most innovative research firm in the world, it is our cultural mandate to continually build new products into the research portfolio. Reference architectures, industry notes, future technology articles, Software Selection as a Service, Concierge Services, SoftwareReviews, keynotes, and playbooks are all examples of recent product additions to the research portfolio. Each new product provides unique value to our customers.

As the pace of technology changes continues to increase, we leverage our agile agenda planning process to rapidly accommodate the requests and needs of our clients. We regularly solicit feedback from our clients and conduct interviews with IT leaders, practitioners, and experts to better understand the challenges facing our member community. This helps to ensure the research and resources match the needs of our clients and deliver extraordinary value.

Industry Focus: An important aspect of the agenda process is to ensure we have industry specialization and depth embedded into the process. We have dedicated industry analysts who build on our expert methodologies and deliverables and layer in industry expertise, tactics, vendor information, and most importantly, industry insight. This industry focus gives our already best-in-class research products an edge in the IT research market.

The Research Process

Info-Tech uses a quarterly research production process; most of our research is written over three months, focused entirely on building best-in-class, practical project-based deliverables, tools, templates, and methodologies. From scoping and problem definition early in the cycle to in-depth secondary and primary research in the latter part of the cycle, our process is designed from the ground up to ease the effort of executing IT projects for our members. Our analysts read hundreds of secondary sources each year and interview as many as 100 IT practitioners, industry experts, keynote speakers, members, and other IT professionals to ensure our research is accurate, practical, and valuable.

We package our research in several ways: blueprints (project methodologies and deliverables), diagnostics, reference architectures, concierge services, vendor evaluations, software selection methodologies, industry reports, and research centers make up the bulk of our hundreds of practical toolkits.

Measuring Research Usage and Value

Once our research is written, it is distributed to our members so clients can book calls with our analysts, who will guide them through their projects. We actively measure downloads, calls, workshops, and other web analytics to ensure we inform our agenda and research processes by identifying where to focus more research, where gaps exist in the research, and what future topics will help our clients. We also solicit client feedback in the form of satisfaction surveys we call “Measured Value”. These satisfaction scores help us determine which areas of our research need updates and improvements, which industries we need to focus on, and where our key strengths and best research areas are.

Putting It All Together

The strong agenda setting process focused on industry, role, and technology topics; the research process designed to build practical deliverables with key insights; and the usage measurement process that informs our research library all add up to provide our clients with better research than anyone else in the market.