

CDI Qualifications and Experience

Mission Statement: Our mission at CDI is to provide clients with the tools and services for implementing effective technologies within their business. Our tools and services are derived from our creativity and the desire to satisfy the client and make their workplace more efficient.

We believe in innovation at CDI: Innovation in the solutions we provide to clients, in how we work with clients and in our day-to-day life. We know that innovation is what keeps us ahead of our competition and allows us to provide a higher standard of quality in our business.

We also believe in communication skills: Communication skills are how we interact with each other and it's how we understand and astound our clients. Our communication skills help us provide the best and most exceptional professional services to our clients.

Established in 2001, CDI has grown to become a leader in Laserfiche document management solutions. The company began by offering an integrated experience for users leveraging the power of the Laserfiche document management platform and integrating the system with different line-of-business applications. With over 100 integrations, CDI is Laserfiche's largest Professional Development Partner.

CDI maintains a full-time development department, creating custom solutions and integrations with Laserfiche, as well as performing conversions from other systems. The custom work of this department has been recognized nationally by Laserfiche in their spotlight case studies and at their annual conferences. While the initial implementation of your Laserfiche system is certainly of very high importance, CDI places an equal amount of importance on cultivating partnerships and helping clients to continue growing their system. The City should be aware that not only does CDI have the necessary resources to provide exceptional support, additional consulting and development services, but is proactive in providing free user group sessions (available remotely), a monthly newsletter, and a comprehensive annual audit of the system.

As a requirement for many clients, Cities Digital carries an SSAE16 certification as a result of an annual audit. Hosting, online backup and Cloud services are offered by Cities Digital from our state-of-the-art collocation facility.

As client projects have grown and the Laserfiche suite of products expanded, CDI added a team of project managers, coordinators and developers. The company is able to provide all services related to this project without any subcontractors.

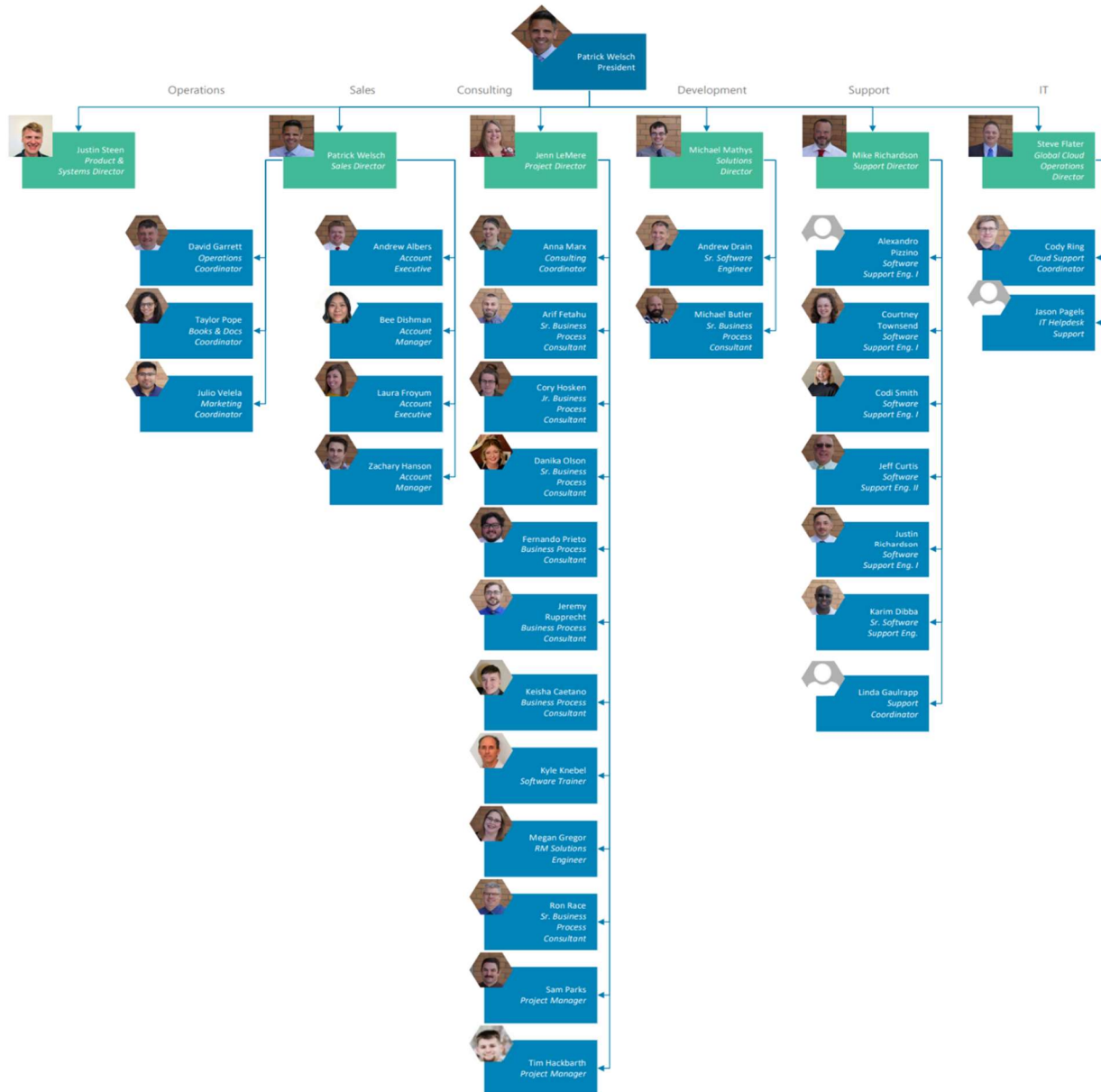
The more than 650 clients working with CDI understand that the consultative services and support they receive is a truly tailored direction, built on experience. By regularly seeking client feedback and involvement, CDI enjoys a high level of customer loyalty. CDI's tag line "Take information further!" becomes increasingly more appropriate, as it is the overriding goal for clients, each and every day.

For more than twenty years CDI has been supporting, training and implementing integrated document management, records management and workflow solutions. It has been the pleasure of CDI to work with clients ranging from the National Guard to The Centers for Medicare and Medicaid, The State of Washington to the Texas Health Professionals Council.

During all the implementations, CDI has offered proactive guidance and expert product knowledge. Paired with friendly and ever-present technical support and an on-staff development team, CDI has the ability to offer all necessary services under one roof.

CDI has implemented hundreds of Laserfiche systems since our inception, with many similar in size to the City of Manor. CDI has helped many government agencies not only implement basic document management environments but, also, much more advanced systems with expanded functionality with records management, workflows, business process automations, and various integrations. Our DocuSign and ArcGIS integrations are popular in the government space. Additionally, CDI has considerable experience implementing local government records retention schedules within the Laserfiche Records Management environment.

Company Organizational Chart



Additionally, CDI would like to highlight our experience in terms of Laserfiche project management, records management, business process design, and ongoing account management. Our experience in these key areas is one of CDI's main distinguishing factors.

Project Management

- CDI has PMP (Project Management Professional) certified employees on-staff that have trained our Project Managers in project management strategies, use of risk registers and the methods and strategies used in ECM deployment.
- Our Project Managers have varying levels of Project Management experience in their role at CDI but also in previous roles prior to CDI.
- The staff selected for this project are trained on a regular annual schedule to use the industry-leading processes for implementation of ECM. The staff selected for this project have also been a part of more than 100 implementations of the Laserfiche ECM solution. With that background, you will be advised on the pitfalls and perils seen in other projects along with suggestions of best methods and quick wins for deployment.
- CDI has implemented projects ranging in size and scope from the Medicare/Medicaid Processing Centers deployment of Records Management features in Laserfiche to a business process deployment ranging multiple continents for a global manufacturing firm.
- CDI uses multiple tools during the project management process including Microsoft Project, our own proprietary project management tools in Laserfiche and report automation for clients.
- Our Project Managers have a Project Coordinator assisting them. Our Project Coordinator's prime role is to assist in scheduling and meeting coordination with clients. This is a valuable role as it ensures meeting coordination back-and-forth is kept to a minimum and allows customers to email consulting@cdi.support for a meeting time with any of our team members.

Records Management

- Our team of experts will properly launch your Laserfiche Records Management deployment. CDI will guide you through the process of organizing, classifying and automating your records. With our plan, your users will be able to effortlessly tag records and watch them automatically enter retention. Laserfiche will perform cutoffs and keep you informed of upcoming dispositions.

Business Process Design

- When it comes to the automation, workflow and approval processes Laserfiche has many features that may be leveraged to solve your digital transformation goals. Our Business Process Designers are skilled, and the staff selected for this project has more than 10 years of designing the very most complicated, advanced and elegant workflows our firm has ever built.
- Staff selected for this project has experience building workflows and forms for other local government customers.

Integrations

- Our team is the largest Laserfiche Development Partner, with more integrations available than any other Laserfiche Partner.
- Our integrations are used by many customers throughout the world, have been available for many years and are proven to work and deliver results.
- When your team has additional integration projects, a new application that has not been previously integrated, our team of developers will be able to assist or build your integration. Our team of developers

(3) are skilled in full stack development and have extensive experience using the Laserfiche API, C#, MS SQL, Angular, JavaScript and many more languages.

Ongoing Account Management

- Your account will be assigned an account manager that will be connecting with the primary account contact no less than four times per year and seeking input on the quality of service you have received.
- The Account Manager assigned to your account will be intimately aware of your Laserfiche product array and be available to generate quotations or handle any concerns you have on your account. Additionally, your Account Manager will be meeting with you to assist in registration for the Laserfiche Empower training conference or other training events in the area.

It is the opinion of CDI that the City will find CDI an exceptional candidate for the proposed project for the following reasons:

1. **Experience:** CDI has 20+ years of experience working with large and small government agencies and currently supports over 650 EDMS/ECM clients nationally. CDI is a Gold/Platinum-certified Laserfiche provider and was awarded the Laserfiche President's Award in 2021.
2. **Leadership:** CDI has led clients through records management and conversions ranging in size from the Medicaid/Medicare Processing Centers to the Utah Retirement System and Public Employee Health Program. Many of the CDI employees have more than 10 years of experience and worked through large, challenging enterprise projects.
3. **Integration:** The development team at CDI has integrated into hundreds of applications and is Laserfiche's largest development partner. With this track record and experience in integration, CDI will be helping your team launch the project and guiding or building the interfaces, leading to a successful completion.
4. **Security:** CDI takes security and your privacy seriously. CDI has passed an SSAE16 audit within the past 12 months and uses a datacenter that is SOCII audited.



It is our belief that CDI has the best offering for the City's project to implement an Electronic Content Management System. Our experience, staff, integrations and guidance will ensure a successful migration to a digitally transformed environment.