

MANAGED IT SERVICES



DO
MORE.

OBJECTIVE

Leverage technology to enhance everything from employee productivity to customer experiences.

HOW TO GET THERE

Commit, then **FOCUS** on where you need to invest your time, money and capital for the highest return.

EXECUTIVE SUMMARY

Thank you for the opportunity to submit a proposal to provide technology and support services for the City of Oelwein and Oelwein Police. We understand you are seeking a competitive proposal for managed IT services.

Our proposal includes information about our firm and values in addition to the specific scope of services and investment dollars you requested. We believe in working with clients who align with our values and with whom we can have an open, honest, and fun working relationship. Technology is critical to operations and can be hard to manage for any organization. Things will not always be perfect, and we want you to know that we can work together to solve any issues that might come up in a respectful and solution-focused way.

HERE'S A GLANCE AT WHAT SETS CREATIVE PLANNING APART:

We're not a commodity: Relationships matter. We understand the importance of our relationship. Our team understands that you have many choices in the marketplace when deciding who to hire for your services. When you partner with us, we promise to go beyond so you can do more. We're powered by people who take the time to truly understand your business needs.

Responsiveness: Available and willing. Our goal is to always respond to our client's inquiries as promptly as we are able, and if we do not immediately know the answer to your questions, we will inform you of what we believe the answer to be and complete further research as necessary.

Geographic reach and depth of resources: Resources at your fingertips. Not only will we exceed your technology expectations, but we'll also share our expertise and resources as necessary. The benefit to you is a personalized experience with a wealth of resources to solve your most complex issues and opportunities. That will save you time and ultimately money. With over 2000 team members located in all 50 states, our experience and expertise are extensive!

Formalized process for feedback: We give our clients a voice. The Creative Planning ENGAGE™ process includes a voice of customer (VOC) element core to our ability to continuously improve. We also provide opportunities for you to rate our engagements and deliverables.

We are confident you will find value in our depth of knowledge, planning approach and our commitment to client care. Creative Planning is a firm with a client-first mentality that you can continually grow with. We would be honored and excited to continue to build our partnership with you and your teams.

OUR PEOPLE

Relationships are at the core of everything we do, and our products and services are designed to meet the specific needs of our clients. When working with Creative Planning, clients find that we focus on earning their trust by being actively involved and focused on helping them be successful in all they do.

PERSONALIZED SERVICE

Our philosophy is to provide timely, quality services that exceed the expectations of our clients. Outstanding client service requires a successful team effort within our firm and with our clients. Providing outstanding service involves enthusiastic, dependable and knowledgeable personnel who are responsible for knowing, understanding and caring about our clients. Our firm believes that outstanding service is a continual process that is refined and enhanced with each client contact.

OUR BUSINESS LINES

Creative Planning has a strong bench of resources and expertise available based on needs of the client. This ensures the most effective and efficient results are delivered!

Audit & Tax Accounting & Bill Pay Payroll Services Legal Technology Insurance
Business Valuations M&A and Consulting Personal Wealth Management
Retirement Plan Advisory 3(38) and 2(21) Fiduciary

Regarding the RFP dated October 9, 2023 we submit the following responses:

Section 7.1

1. *Give a brief overview of your organization's involvement in providing IT value added services in the marketplace.*

Creative Planning has been supplying technology support services for over 20 years to non-profits, manufacturers, health care providers, construction, professional service organizations, retail and agricultural companies. We have teams that are dedicated to helping our clients with planning and execution of projects, for ongoing helpdesk and onsite support and for implementing and monitoring various security and management tools.

2. *How long has the organization been in this business and what is your current market share?*

Creative Planning has been supplying technology support services for over 20 years. Starting as Networking Solutions and then in 2016 through a merger became BerganKDV. In 2023 Creative Planning purchased BerganKDV to expand their business services to their clients in all 50 states.

3. *In what cities do you maintain offices?*

Waterloo, Cedar Rapids, Des Moines, Bloomington, St. Cloud, Kansas City are the main offices for our technology support team.

4. *Indicate the number of employees in your organization. How many of those are dedicated to account management and/or technical support?*

We have over 2000 employee and approximately 60-65 staff members are dedicated to the technology support division. Of those, 6 people are focused on account management and the rest are divided between dispatch, help desk, onsite support, project implementation and security services.

5. *How many are full-time vs. Contract?*

The 60-65 staff members are all FTE's - if we were to include contracted members in the field that handles our national accounts, this number would exceed 100+ in total.

6. *What differentiates your organization from your competitors in the marketplace and how will this be relevant to us?*

Creative Planning's Business Services run as independent divisions capable of moving fast and keeping pace with market trends and inevitable headwinds. As new challenges arise, so do innovative solutions, and the faster we can pivot and adapt, the better. "Urgency is the ultimate sign of respect" and that is the way we conduct ourselves. To further our team's ability to go 'deep' with our clients, we've also standardized on a 'channel' approach, while each business unit may also specialize in manufacturing, government, construction, etc...

7. Will you subcontract any components of the proposed solution to third party organizations? If so, please describe the components to be subcontracted and provide details of any agreement in place with the subcontracted firm/individuals as well as a summary of past work that you have successfully completed together.

Most of our solutions are in-house and fully managed. Creative Planning does not handle items such as web site design, cabling, or mounting equipment to walls or ceilings. We have no formal agreement in place and use various vendors in different markets. If a client already has a strong relationship with a business who has served them well, we will work with them. If they do not, we can recommend a vendor who we have worked with previously.

Excerpt from agreement outlining limits/conditions in our agreements:

In addition to other limitations and conditions in this Agreement, the following services are not included as part of the base monthly fees paid by CLIENT to Creative Planning Technology LLC:

- Cost of consumables, replacement parts, hardware, software, printer hardware and associated services are outside the scope of this agreement.
- Formal or informal onsite or offsite client training. (End user security training is included.)
- Manufacturer warranty parts and labor/services are outside the scope of this agreement.
- Remedial or repair services that are the result of damage caused by water, wind, lightning, accident, vandalism, burglary, neglect, misuse, alterations or deviations from the manufacturer's design, transportation or relocation of the supported devices or software, the failure of non-covered devices or software, or operator error.
- Service that is needed because of unauthorized installations, repairs or modifications of the Supported Devices or Software not carried out by Creative Planning Technology LLC or its authorized representatives.
- Maintenance of accessories, alterations, attachments, upgrades, or other unsupported devices.
- Services which are not expressly described within the "Included Services" section of this Agreement, including service on software or hardware not expressly described in the SUPPORTED DEVICES AND USERS section of this Agreement are NOT included and will result in additional charges.
- Hardware and Software which lack current vendor support and maintenance coverage. (Creative Planning will perform minimal troubleshooting, 30 minutes or less, for hardware and software which is not under vendor support and maintenance coverage, after this time, the issue will become billable at current time and material rates.
- Support on Home Versions of Desktop Operating Systems
- Project Services - Projects are defined as an upgrade or replacement of hardware or software. Projects services would be communicated in advance and prior authorization from the client would be obtained.
- Security incident response/remediation and disaster recovery services greater than 2 hours.

8. Please describe your organization's experience in transitioning clients to cloud-based technologies from more traditional IT service models.

We evaluate the client's needs and review their current technologies. We will then discuss with the client to see if a cloud-based solution is the best fit. We have clients that have all their main components (servers, phone systems, data) in the cloud, clients that have a mix of on premise and cloud solutions and clients that have everything on premise. While some of the decisions can be based on pricing, some of the decisions can also come down to the client's preference.

9. Please provide details of three current customer accounts that are similar in scope and requirements to those of the City of Oelwein.

1. Farmers Union Coop, Mark Davis is our primary contact. Managed IT client, 8 locations connected via VPN, on premise server with 2 virtual servers and some cloud hosted solutions and 55 users

2. Behavioral Health Services, Paul Hill is our primary contact. 6 locations, on premise server with 3 virtual servers and 70 users.

3. First Maxfield. Carmen Schaefer is our primary contact. Managed IT client with 4 sites connected via VPN, redundant internet service providers.

7.2 Proposed Approach and Solution

1. Please provide a proposed work plan for a migration to your organization as a City of Oelwein preferred vendor. Specifically, provide the following information: i. Key activities ii. Timing iii. Information/resource requirements from the City of Oelwein iv. Deliverables v. Key milestones, checkpoints, and other decision points

Upon selection we can draft a Key Milestones doc. This will name the key activities, timing, literally the key milestones, and checkpoints. The city of Oelwein will need to provide a primary contact for us to work with. The Timeline on page 28 provides an outline to getting started with our managed IT services. **(See page 7 for an example of our onboarding checklist)**

2. If we elect to move forward with your organization, what City of Oelwein resources would you require (e.g., information, data, staff resources, communication) during the course of migration and on an ongoing basis?

Should the City of Oelwein move forward with our proposal the onboarding of monitoring and security tools typically takes 30-60 days, with several Creative Planning resources engaged. During the onboarding we will primarily interact with the City's primary contact but will need to communicate with each user on some of the tools. During the onboarding process, we will gather information from the City on topics such as software support agreements, device administrative usernames and passwords and document renewals for hardware and software. Some of this information we already have and some of it we will need to ask your staff. There will be regular meetings that we need communication going both directions. We can report on things we see happening on the network, make recommendations and plan for regular hardware replacements. The City will need to let us know if they want to upgrade or change software so that we can plan our resources for a smooth process.

City of Oelwein - Sample Onboarding Checklist

Track	When	Who	What
CLIENT KICKOFF MEETING			
	12/8/2023	Dave	Finalize agreement paperwork
	12/15/2023	Dave	Meet your BKDV Technology Support Team
	12/15/2023	Dave	Determine Communication Schedules/Touch Base Meetings with Timelines
	12/15/2023	Dave	Overview (what we provide, what to expect, how to engage)
	12/15/2023	Dave	Agree on key milestones and timelines
PRE-WORK (Can be done prior to "start date")			
	12/22/2023	Dave	Collect third party contact information and contract details
	12/22/2023	Dave	Collect End User contact details, identify emergency contacts
	12/22/2023	Dave	Create and update client profiles in various systems
	12/22/2023	Dave	Create draft of IT budget and roadmap
	12/22/2023	Tech Team	Collect and create Admin passwords, remove third party tools and access/lockdown network
	12/29/2023	Sharon	Create Agreement in ConnectWise
	12/29/2023	NOC	Configure support call tree, generate Premium Support Code, create labels
OFFICIAL START DATE (Target October 1st)			
	1/1/2024	Brian	Helpdesk is LIVE
	1/6/2024	NOC	RMM agent installs
	1/6/24	NOC	Configure Workstation and Server Patching
	1/6/2024	NOC	Enable Windows disk encryption (workstations)
	1/13/2024	NOC	Auto-Rotate passwords (BergankDV Admin user, Servers only)
	1/13/2024	NOC	Up/Down Monitor on critical network devices
	1/13/2024	NOC	Spam filtering and impersonation protection
	1/13/2024	NOC	Setup and tune data backup alerting
	1/20/2024	NOC	EDR Setup and Rollout
	1/27/2024	NOC	Internet Filtering - configure and roll-out
	2/7/2024	NOC	Setup vulnerability scanner and schedule regular scans
	2/10/2024	Sharon	Setup End User Security Training and Darkweb Monitoring
	2/17/2024	Dave	Post Onboarding Quality Assurance Process

3. Please identify the team that will be assigned to the account and describe how you plan to interact with us and any third-party providers that may provide services to City of Oelwein.

Should you choose the Elevate Manage plan, we will assign a Virtual Chief Information Officer (VCIO), an onsite support technician and a remote (help desk) support technician. We will direct calls and service issues to that team by default, but if they are unavailable to take your call or cannot handle the service request in the time you need it handled, we will bring in more team members to help as needed. Weekly our internal team will meet to review service on your account and the VCIO will have weekly touchpoints with the client's primary contact. The VCIO will also conduct quarterly business review meetings and the annual IT budgeting and road mapping.

4. Please describe your experience in providing the following value-added services:

a. Technology Roadmap - One of the most important baselines we will establish together is your current state vs your future state.

Described as a Technology Roadmap – our goal with this ongoing exercise is to eliminate surprises, establish a budget, align to a proper refresh cycle, and most importantly – ensure the network never ‘goes backwards’.

b. Working in a CJIS compliant environment – Creative Planning Business Services has experience working inside sensitive CJIS compliant environments. We have done work for both local and county law enforcement agencies.

c. Solution design – Prior to starting any project, we will review the requirements and recommend a solution that we know will be reliable, supply reasonable performance and one that we can support. With a managed contract and a fixed monthly price, we're properly motivated to ensure it all works.

d. Network and email system monitoring - Included with our solution options.

e. Remote backup - Whether fully on-prem, hybrid, or completely hosted in the cloud- we will ensure proper backups are configured with the recovery points and recovery time objectives that fit the client's needs. Various options exist.

f. On-demand Technology Training - Security awareness training and testing to assess the team's progress and access to Microsoft Clip training are included in our managed service offerings. Additional training would need to be discussed to determine the client's expectations and if it is something we would handle or if we would refer you to a 3rd party training company.

g. Managed Cyber Security - Included with our Security+ package, should you select this option, you'll have a second layer of threat detection, coupled with a managed SIEM solution for log aggregation and real-time analysis. Monitoring and management of the security and monitoring tools we will use are included in each level of our service plans.

h. Procurement management - Creative Planning would prefer to handle the ordering of relevant IT hardware/equipment going forward. This ensures minimum specifications are always met and speeds up the configuration and deployment process.

i. Technical support, including remote user support - Part of your new solution includes access to our stellar Helpdesk team. Available M-F, standard business hours. This team answers the phone with a smile. And goal number one is to first understand your problem, then solve it! There are two ways to contact the helpdesk. 1. Call the number we'll provide you with! 2. Email support@bergankdv.com. With the network setup correctly, and recommended tools installed, there are very few issues we cannot solve completely remotely.

- j. Reporting and communication - "There's nothing you cannot solve with proper communication!" - Firm believers in that, which is why Dave Wyant will continue as your Technical Account Manager going forward. Part of his duties include updated reporting during each of your formal meetings. His experience with your team and his ability to translate technical terms will empower the city to act only on the most important of the IT items at any given time.
- k. IT policy review and development - Included with our Security+ package, should you select this, you'll have access to Robin Nelson, our in-house CISO, who specializes in security policy review and development. With our established baseline, he'd help expand on existing documents and create net news where applicable. Basic IT policies such as acceptable use policy can be created as part of the Elevate Manage package.
- l. Implementation planning and guidance - This is the standard operating procedure for any projects we've yet to uncover and scope out. We're happy to be that sound board and bounce ideas. We're also happy to lead the charge and pull you along. Elements of this will make their way onto your Technology Roadmap.
- m. PC deployment - The best way we've found to execute PC deployments is at a fixed rate so that you know with each PC what your set up costs will be. Each PC setup would cost \$450.
- n. On-site implementation of business applications - Our "Managed IT" division responsible for responding to this RFP are NOT business app specialists. With such a vast array of options it's impossible to specialize in this area. However, we're team players and cooperate accordingly with the business app's dedicated support team.
- o. Asset inventory management - Our very first step is figuring out "what you have". If we can't see it, and you don't know it exists... then we can't protect 'it'. Going forward we'll have tools and processes in place to help us identify everything touching the network. The monitoring and reports we use will help us plan proactively for upgrades and replacements.
- p. Software licensing control - There will be an itemized list of software/licenses deemed necessary for our Managed IT solution. Beyond that, we'll help document and audit the need for current and future licenses, relative to the scope of IT.

5. Please describe your experience in providing server technology and service for your customers, focusing on planning, implementation, and ongoing support.

We have implemented hundreds of servers (on premise and cloud) over our 20 years. We start by understanding the client's needs. We review system requirements of the software that will run on the server and once we know what software and data needs are, we can make recommendations. We will write a scope of work and bill of materials needed and review that with the client so they understand the process and what costs will be involved in implementing. Implementation is handled by our project management team. There will be 1 project manager in charge of the project, and he can bring in additional resources from our team as needed. The project manager will discuss timelines with the client and provide ongoing updates. Once implemented we will have our monitoring and patch management software in place to keep patches up to date and us alerted if any critical events (hard drive failing, resource utilization higher than we want, a patch that fails to install, etc.) so that our team can investigate. As part of our quarterly and annual meetings we will discuss what software and hardware should be replaced in the next year so that we can start discussing ideas and finding the right solution.

6. Can you provide specific examples of how you have worked with customers that began with significant technology limitations and helped to successfully transform them into organizations with well planned and executed technology strategies? What were the critical success factors in this transformation?

Many organizations prefer to use the “if it isn’t broke, don’t fix it” mentality, which can hurt the business financially in the long run. We recently worked with an engineering firm that had purchased very high-end workstations and servers with multiple levels of redundancy in 2012, but then ignored their network for 10 years. The problem we see when businesses do this is they end up with hardware and software that is no longer supported and incompatible with new technology. This client was running into software incompatibility and hardware components failing causing lengthy interruptions to their business. Sometimes when clients don’t proactively plan replacements for extended periods, the only solution is to upgrade everything at once, which results in a large expense. We took this client into a hybrid environment where they still house their large engineering files locally on a network attached storage device, but moved their domain controller, mail server and accounting software servers into a Microsoft Azure cloud environment. PC’s as well were upgraded to Windows 11 Professional.

Another example we can provide is for a non-profit organization that had invested heavily in datacenter hosting for their environment. They had several systems that were nearing the end of their usable life (backup system, Servers/Storage Area Network, network firewalls and switches). This organization had a very tight budget as a non-profit and was overwhelmed with the thought of having to do a hardware refresh. One of the advantages of working with Creative Planning is that we have multiple solutions that can help. One of our Accounting solutions determined there was Covid relief funds we would help leverage to move the client to a new Cloud solution, which was a great fit for this client as many of their applications had been migrated out to the cloud and there was less need to keep infrastructure hosted. Creative Planning helped move this client out to the cloud, trained their staff how to use these new technologies and helped them come up with a plan to move forward. This one example saved the client close to \$100,000 in costs and put them in a much better position to run their operations more affordably and securely.

7. How can we be confident that hardware pricing levels will be aggressive and will remain highly competitive over a multi-year period during which new models may be introduced?

We have been selling hardware and software ever since we started technology support. We only sell business class equipment that our team has knowledge of configuring and supporting. We do not guarantee the lowest price, but our prices are competitive. Part of our quoting process includes understanding the client’s needs, making a recommendation to fit those needs, and handling the ordering process so that your staff does not have to spend their time investigating, evaluating, and ordering. All managed services providers, such as us, will want to have hardware and software utilized they are familiar with and confident that it will provide the performance and reliability needed to minimize downtime for their clients. Part of the cost that is often overlooked is downtime and how that affects an employee’s productivity. While a client can often find a “cheaper” solution up front, overall if we use quality equipment it should minimize downtime and improve efficiency.

7.3 Support

1. Describe fully your technical support options including the assistance request process, escalation process, support hours, response times, staffing levels, staff ability, and physical location of the help desk.

We refer to an 'assistance request' as a 'ticket'. A ticket can be user generated or auto generated by our baseline security toolset. For a user generated ticket there are two main ways to contact our helpdesk. You can email us if you're multitasking and/or consider the issue to be lower priority. For anything urgent, we recommend calling us. Upon rollout of our services, each user will receive a 'sticker' on their workstation that highlights these two modes of contact. And depending on the service level you opt in for – there's also a premium line and associated code that could be assigned.

The helpdesk is staffed with Tier 1, Tier 2 and Tier 3 team members based on their tenure and knowledge within the space. Ingested tickets are processed first by a dispatch team that will decide the priority and category of the issue. From there, they'll assign the most proper tech or team to remediate. Should that initial tech or team be unable to solve the issue, the ticket would then be escalated to the next ranking tenure/knowledge base. These thresholds can vary depending on the type and priority of an issue.

Support hours are slightly expanded beyond 'standard business hours', aka your 8-5. With such a large Midwest presence, the central time zone benefits the most from our 7am-6pm managed IT package. This offers a buffer at the start and the end of the day. And it's also important to point out that we do have technicians available 24/7. We'll touch further on pricing implications but these 'after hours' type events would usually come with a billable rate.

Response times vary as it's quite difficult to predict the issue and guarantee the solution. What we do highlight is our SLA or Service Level Agreement to give you an idea of our 'time to respond' which is far more controllable.

Our team consists of approximately 65 FTE's that consist of our helpdesk and onsite support team, project and implementation team, Cyber security group and rest are account managers/vCIO's, members of our leadership team and administrative staff. As a collective, if you tried to quantify the years of tenure, it would be hundreds of years of experience.

Physical locations of our helpdesk include Waterloo, Cedar Rapids, Des Moines, Kansas City and Minneapolis.

2. Please provide details on your standard reporting capabilities.

Our aim with reporting is to not inundate. Too often we see and hear of "quarterly business reviews" that are filled with a ton of fluff and raw data that means nothing to the consumer. In conjunction with your account manager, you can decide a cadence of when you will meet, how you will meet, and what you would prefer to cover. If we can spend less time on the past and more time on the future, that is where we are winning with clients. AS far as capabilities go... today, more than ever... really the sky's the limit on all the ways we can pull and slice information. Examples of standard reports include patch compliance, hardware lifecycle, phishing testing and training and an executive summary. Other information summarizing issues that came up within our endpoint detection and response and vulnerability scans will be sent periodically too.

3. Describe any documentation and support (e.g., user manuals, online help, interactive demos, web-based seminars, and online knowledge base) that will be available, both from the technical perspective and the end user perspective.

During your onboarding we will conduct a 'kickoff' with your team where we will cover the basics and teach you how to maximize your helpdesk support experience. Something we emphasize is the 'post-resolve' where we ask you to please fill out the helpdesk surveys as it is the #1 way to gauge our work and improve your experience. We celebrate the good stuff and act on the bad stuff.

Depending on the use-case – we have a few tools that can suffice as an internal knowledge base and a host for demos, training, and such.

From our perspective, the most important end user training we will be providing is the Security Awareness Training (SAT) AND testing. Despite our best efforts and a very robust set of security tools... the end user is still the top security risk at any organization. Documentation of details about your network are kept within our database so that any of our support team can assist you.

4. What options are available for user training and technical training that may be required by our staff?

Other than our onboarding kickoff, the SAT mentioned above is our #1 focus. We would insist on both a carrot and a stick to incentivize behavior on this topic. Microsoft clip training is available to each user as well.

5. Describe any user groups, websites, newsletters, conferences, or any other means you support for sharing information and soliciting service feedback.

Our team is quite active on LinkedIn where we aim to demonstrate our thought leadership within the IT and Cyber space. Our website contains a series of blogs. We hang out where our clients and prospects are, so industry conventions/conferences/townhalls, you name it.

Your account manager will also be a source of news and updates, ideally pulling you along and guiding your technical journey.

And as for service feedback – please fill out the helpdesk & project surveys!

6. How do you monitor customer satisfaction and quality assurance on an ongoing basis and how might we benefit from this process?

Customer satisfaction is not only a metric we watch but also one that we publish internally. With our digital signage this is one of the top metrics we report and act upon, virtually in real-time. Following closed service tickets and projects we will send surveys asking for feedback.

Following a completed survey, anything that ranks in the + column is something we'll celebrate internally every Friday, highlighting positive client interaction. Anything that ranks in the – column is flagged and investigated further. What went wrong? And how could we improve the experience?

Depending on the circumstances this may result in a call from a member of our leadership team, or your account manager. As well as internal communications to train and advise how we might avoid this in the future.

7. City of Oelwein user base varies considerably in its level of technical sophistication. Please describe your experience in successfully supporting users that may be remote and possess limited technical skills.

Just yesterday we received feedback from a remote and non-technical user... he's well into his late 60's and in the process of digitally transforming his business so that his son may take over soon. His feedback regarding our service was 'flawless' and his best compliment was regarding his account manager, stating that 'she's extremely patient with me and has taught me so much about these tools I'd otherwise have no idea about...'

So, in other words – it happens. IT happens. To everyone. Even the most sophisticated of users will have issues and often in their attempts to resolve them, they make matters worse. We certainly don't mind users with a 101 understanding. It's an opportunity for us to create an experience like the one we just described.

One of the biggest advantages of dialing in, direct to your helpdesk team, is our ability to answer with a smile and save the day!

7.4 Financials

1. Describe the pricing model(s) that you typically employ for your standard services.

We break Managed IT down into three main pillars. You have your tools, your helpdesk, and your account management.

We arrived at the following quantities after scanning the network and discussions with Dylan and used these quantities for our calculations. The quantity of users and devices supported will be reviewed periodically and the monthly fee adjusted up or down as needed:

City Hall: 28 devices (PC's, laptops and 1 virtual server), 22 regular users, 7 light users (email on a smartphone or tablet only), 4 mobile devices (2 are at public works)

Police: 23 devices (PC's, laptops and 4 virtual servers), 17 regular users

The 3 service plans that we feel are the best fit based on our knowledge of your network and users are listed below:

Elevate SMB – Includes: Our full suite of tools, dispatched helpdesk (unlimited remote support between 8am-5pm), and account management. Onsite support is billed at \$150/hour and after hours would be billed at 1.5 times the hourly rate. Projects would be scoped out for labor and parts ahead of time and presented for approval and are billed separately. \$4459/month. PC setups are billed at \$450 each.

Elevate Managed – Includes Elevate SMB plus premium helpdesk (unlimited remote and onsite support 24x7), vCIO services and designated support team. A service level agreement is provided. Projects would be scoped out for labor and parts ahead of time and presented for approval and are billed separately. \$6800/month. PC setups are billed at \$450 each.

Elevate Secure+ - is Elevate Managed with some 'extra' focus on Cybersecurity and includes a vCISO. Projects would be scoped out for labor and parts ahead of time and presented for approval and are billed separately. \$7760/month. PC setups are billed at \$450 each.

At each of these levels you would check a lot of boxes on a Cyber Liability application and shift a significant amount of IT risk over to us.

What you will want to consider the most is the kind of helpdesk experience you want your team to have.

Dispatched HD vs Premium HD comes down to this – when you call in, would you like to describe your issue to our dispatch team, have them process the issue, assign the issue, and receive a call back from a tech? OR would you like to call in, describe your issue to the tech, have them begin work immediately and possibly solve right over the phone? With the premium helpdesk support we will assign you a code that you enter when calling us that will ring your designated team. If your designated team members are unavailable, it will then roll over to the rest of our staff.

2. Please indicate the charges associated with each of the following services, including the key driver of each cost and whether it is included in a standard per-unit cost vs. charged on an ad hoc basis.

- Technology Roadmap - **Included with Elevate Managed and above plans**
- Solution design - **Included**
- Network and email system monitoring - **Included**
- Remote backup – **Ad Hoc but would be required.**
- On-demand Technology Training – **Cyber security and Microsoft clip training is Included**
- Managed Cyber Security – **Ad Hoc depending on support selection. With all our plans we will monitor and manage the security tools we include in that plan.**
- Procurement management – **Included**
- Technical support, including remote user support - **Included**
- Reporting and communication - **Included**
- IT policy review and development – **Ad Hoc depending on support selection.**
- Implementation planning and guidance - **Included**
- PC deployment - **Ad Hoc, \$450/device**
- On-site implementation of business applications – **Ad Hoc and would need scoping.**
- Asset inventory management - **Included**
- Software licensing control - **Included**

3. Do you offer service bundles and if so, describe the effect of this bundling on pricing?

The general idea behind our four Elevate packages described above is – can you get enterprise-grade IT and Cyber controls for an affordable price?

The short answer is, YES.

The longer answer is – the more time, energy, and focus you give to this, the safer you will be. Everyone has a sliding scale of capital outlay vs. Risk. However, nobody is 100% secure which is why ‘money isn’t the only variable.

Beyond the basics of having the right tools, access to a helpdesk and ongoing guidance from a Virtual Chief Information Officer... it’s about building a culture of IT within your organization. We will ensure a proper foundation. But we will need your team's help along the way.

YOUR SECURITY TOOLS



A TOOLSET THAT ELEVATES

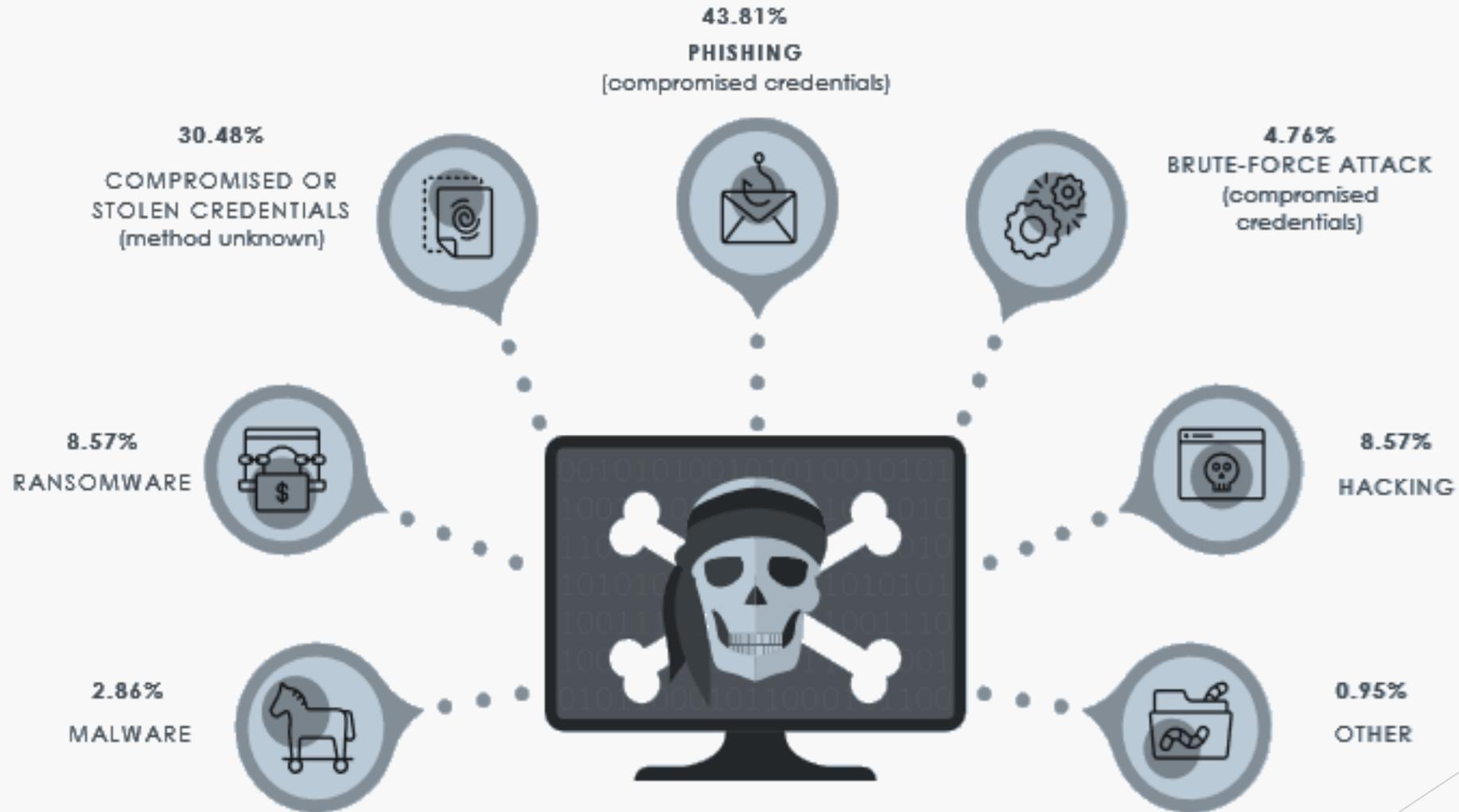
- DARK WEB MONITORING & ALERTING
- USER PASSWORD MANAGEMENT PORTAL
- Remote Monitoring and Management on EVERY DEVICE
- NETWORK HEALTH REPORTS
- ENDPOINT DETECTION AND RESPONSE
- CONTENT FILTERING ONSITE AND REMOTE
- REMOTE PATCH MANAGEMENT
- EMAIL SPAM FILTERING / CONTINUITY / ENCRYPTION/ Impersonation Protection
- END USER SECURITY TRAINING
- PREVENTATIVE PHISHING TESTING
- DISC ENCRYPTION
- VULNERABILITY SCANNING
- Hardware Lifecycle



THE BAR IS DEFENSIBILITY

- When bad things happen, who's responsible?
- In "IT" – the **liability** follows the data
- With or without insurance...
- What would a "reasonable" person/company do?
 - Have a firm grasp of scope
 - Show measurable, documented improvement over time
 - No clear evidence of willful negligence
- In short – don't be low hanging fruit!

How Are Breaches Happening?



YOUR IT TEAM



THE TEAM APPROACH

BerganKDV Technology Accountability Groups

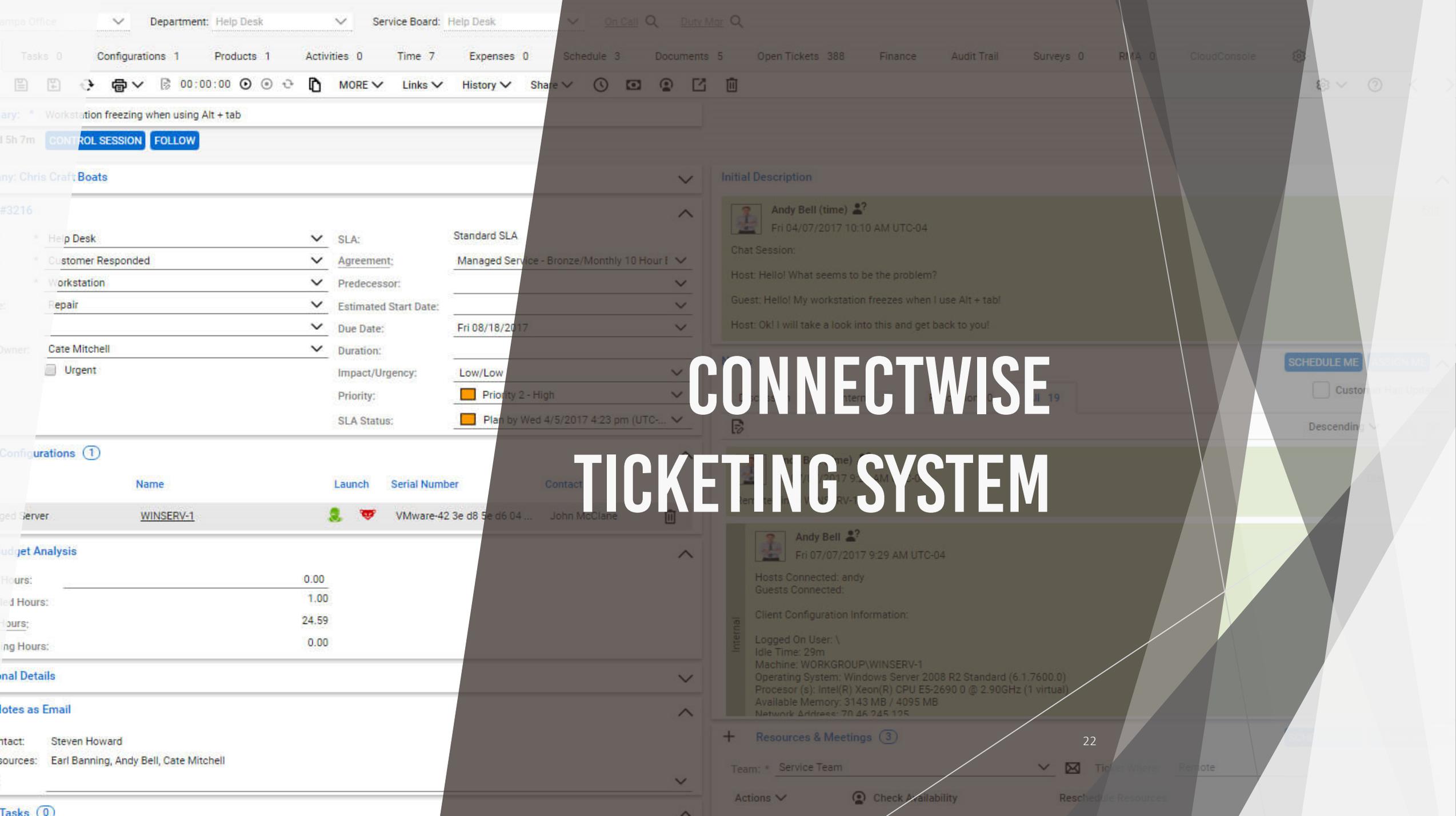
Technology Solutions Leader: Dan Roling

<u>Support Services Group</u>		<u>Project Services Group</u>	
LMA:	Brian Frederick Cedar Valley	LMA:	Rob Huffman Cedar Valley
			John Wyrick Remote / ICR
			Justin Shook Remote / CV
			Matt Pocock Remote / KC
			Matthew Swenson Twin Cities
<u>Support Services - Client System Admins</u>		Group Email: Tech-ProjectServices@BerganKDV.com	
Lead	Jordan Michaelsen Cedar Valley	<u>vCIO Group</u>	
	Adam Williamson Remote / ICR	LMA:	Gene Brixey Kansas City
	AJ Klocke Remote / DM		Andrew Brockway (vCIO) Remote / CV
	Andrew Fails Remote / KC		Justin Smock (vCIO) Remote / CV
	Bill Bollinger CCMH / KC		Steve Bateman (vCIO) Remote / ICR
	Eric Stringham Remote / KC	Group Email: Tech-vCIOTeam@BerganKDV.com	
	James Byland Remote / TC	<u>Security Assessment Group</u>	
	John Peters Remote / ICR	LMA:	Robin Nelson St Cloud
	Karen Horton CCMH / KC	<u>Centralized Services Group</u>	
	Kevin Johnson Remote / DM	LMA:	Dave Seawel Cedar Valley
	Matthew Coucke Remote/SC		Melissa Anderson Remote / KC
	Mike Herbrandson Remote / CV		Mitchell Cook (NOC) Remote / CV
Group Email: Tech-SystemAdminTeam@BerganKDV.com			Quinten Neis (NOC) Remote / SC
<u>Support Services - Premium Support Team</u>			Sharon Hansen Remote / CV
Lead	Alex Mord Remote	Group Email: Tech-CentralizedServices@BerganKDV.com	
	Aaron Paul Remote / KC	<u>Technology Sales Specialist</u>	
	Abdi Muhumed St Cloud		Jake Wagner ICR
	Austin Kohls Remote / CV	<u>Account Management Group</u>	
	Erik DeWitt Remote / TC	LMA:	Justin Tagtow Cedar Valley
	Ian Tagtow Remote / CV		Angelique Kramer ICR
	Kristi Majewski Remote / SC		Dave Wyant (TAM) Cedar Valley
	Kyle Schemmel Remote / CV		Nicky Herrmann Cedar Valley
	Lucas Cook ICR		Sammy Shand (TAM) Twin Cities
	Sully Mujkanovic Remote / DM		Susan Perkins (TAM) Remote
	Zack Gassman Cedar Valley	Group Email: Tech-AccountManagement@BerganKDV.com	
Group Email: Tech-ClientPremiumSupport@BerganKDV.com			
	Abbey Fangman (SS Scheduler) Remote / CV		
	Emily Sodergren (SS Dispatcher) Remote / CV		
	Travis Hoing (SS Coordinator) Remote / CV		
Group Email: MoD@BerganKDV.com			

YOUR PREMIUM SUPPORT

- ▶ Check out the sticker!
- ▶ Call
 - ▶ Premium support line and code to access dedicated team:
 - ▶ 2-3 Techs who understand your network.
 - ▶ High Priority
- ▶ Email
 - ▶ For a ticket on the run.
 - ▶ Lower priority



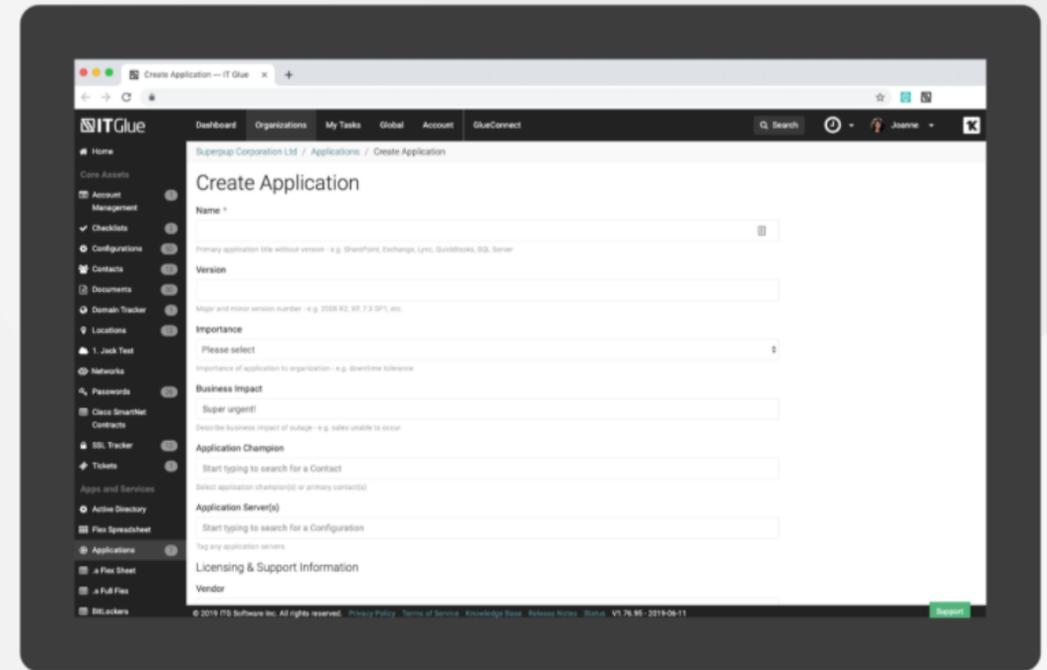


CONNECTWISE TICKETING SYSTEM

MY GLUE

Centralized Documentation – Shared Portal

- ▶ Document your:
 - ▶ Network
 - ▶ Assets
 - ▶ Software Licensing
 - ▶ Subscriptions
 - ▶ Support Renewals
 - ▶ Secure Password Management
 - ▶ Domain & SSL Tracking



**YOUR
VIRTUAL
CHIEF
INFORMATION
OFFICER**



QUARTERLY BUSINESS REVIEW

- ▶ On a quarterly basis YOUR Creative Planning vCIO will meet with you to discuss:
 - ▶ Strategic Planning
 - ▶ Budget Planning
 - ▶ Lifecycle management
 - ▶ Policy and Standards Alignment
 - ▶ Technology Roadmap



YOUR WEEKLY HUDDLE

- ▶ We schedule a weekly touch point with YOU and your VCIO.
- ▶ Internally a TEAM huddle is held every week to discuss what is going on with your business which consists of your:
 - ▶ vCIO
 - ▶ 2-3 Members of the Tech Team
 - ▶ Relationship Manager

TIMELINE



Approval to move forward (By December 15 if January 1 is start date)



Onboarding Kick-Off (January)



Implement Tools (January/February)



Documentation (January/February)



Support GO-LIVE (January 1, 2024)



Worth mentioning →

Day-One we can take support issues @ support@CreativePlanning.com or PREMIUM SUPPORT NUMBER.

LET'S GET
STARTED!

