



U.S. General Services
Administration

Federal Supply Service Authorized Federal Supply Schedule Price List

On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order are available through GSA Advantage!®, a menu-driven database system. The INTERNET address GSA Advantage!® is: GSAAdvantage.gov.

SCHEDULE	Multiple Award Schedule (MAS)
LARGE CATEGORY	Information Technology
SUBCATEGORY	IT Services, IT Software
SPECIAL ITEM NUMBER (SIN)	511210 Software Licenses 54151S Information Technology Professional Services OLM Order Level Materials
FCS/PSC CODE	DA01 IT and Telecom - Business Application/Application Development Support Services (Labor) 7A21 IT and Telecom - Business Application Software (Perpetual License Software)
CONTRACT NUMBER	GS-35F-298GA
PERIOD COVERED BY CONTRACT	March 17, 2017 to March 16, 2027

Pricelist current through Modification PO-0046 December 15, 2022

For more information on ordering from Federal Supply Schedules go to the GSA Schedules page at GSA.gov.



Info-Tech Research Group Inc.

3960 Howard Hughes Parkway, Suite 500, Las Vegas, Nevada 89169 | 1-888-670-8889, 702-446-3782 (Fax) | www.infotech.com

Business size: Large Business

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Customer Information

1	Awarded Special Item Number (SIN)	SIN 511210 Software Licenses SIN 54151S Information Technology Professional Services OLM Order Level Materials *Eligible for Cooperative Purchasing and Disaster Recovery
2	Maximum order	\$500,000.00
3	Minimum order	\$100.00
4	Geographic coverage (delivery area)	Domestic delivery within 48 contiguous states, Alaska, Hawaii, Puerto Rico, Washington, DC, and US territories. Domestic delivery also includes a port or consolidation point, within the aforementioned areas, for orders received from overseas activities.
5	Point(s) of production	London, Ontario, CANADA
6	Discount from list prices or statement of net price	GSA prices represent net price with discount included. To view and order from the complete catalog of products available under this GSA Schedule, please search under our contract number at the GSA Advantage! website.
7	Quantity discounts	None
8	Prompt payment terms	0%, Net 30 days Information for Ordering Offices: Prompt payment terms cannot be negotiated out of the contractual agreement in exchange for other concessions.
9	Foreign items	All offerings are of Canadian origin.
10a	Time of delivery	1-day ARO
10b	Expedited delivery	Not applicable
10c	Overnight and 2-day delivery	Not applicable
10d	Urgent requirements	Not applicable
11	FOB point(s)	FOB destination
12a	Ordering addresses	Info-Tech Research Group Inc. 3960 Howard Hughes Parkway, Suite 500 Las Vegas, Nevada 89169

12b	Ordering procedures	Ordering activities shall use the ordering procedures of Federal Acquisition Regulation (FAR) 8.405 when placing an order or establishing a BPA for supplies or services. These procedures apply to all schedules. a. FAR 8.405-1 Ordering procedures for supplies, and services not requiring a statement of work. b. FAR 8.405-2 Ordering procedures for services requiring a statement of work.
13	Payment address	Info-Tech Research Group Inc. 3960 Howard Hughes Parkway, Suite 500 Las Vegas, Nevada 89169
14	Warranty provision	Refer to GSA Approved Terms of Use and Privacy Policy
15	Export packing charges	Not covered on contract
16	Terms and conditions of rental, maintenance, and repair (if applicable)	Not applicable
17	Terms and conditions of installation (if applicable)	Not applicable
18a	Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices (if applicable)	Not applicable
18b	Terms and conditions for any other services (if applicable)	Not applicable
19	List of service and distribution points	
20	List of participating dealers	Not applicable
21	Preventive maintenance	Not applicable
22a	Special attributes such as environmental attributes (e.g., recycled content, energy efficiency, and/or reduced pollutants)	Not applicable
22b	If applicable, indicate that Section 508 compliance information is available on Electronic and Information Technology (EIT) supplies and services and show where full details can be found (e.g., contractor's website or other location). The EIT standards can be found at: www.Section508.gov/ .	Not applicable
23	Unique Entity Identifier (UEI) number	DUNS: 79692602 SAM UEI: NBLT8K2SA48
24	Notification regarding registration in System for Award Management (SAM) database	Info-Tech Research Group is registered in SAM.gov.

About Info-Tech Research Group (Info-Tech or ITRG)

About Us

Info-Tech Research Group ("Info-Tech" or "ITRG") is a full-service IT research, advisory, and professional services firm, founded in 1997, with over 700 full-time employees.

Over 40,000 members from around the globe rely on Info-Tech's practical approach and best-in-class research and services to help them navigate their complex IT and business issues.

Our IT research, advisory, and consulting services include technology-based business research, industry-specific reporting, best-practice methodologies, benchmarking, and market analysis research.

Additionally, Info-Tech's HR research and advisory division, McLean & Company, is the trusted partner of HR and leadership professionals around the world. Our unparalleled offering includes full-service assessments, practical action plans, impactful training, and more.

Our Approach

Info-Tech offers a practical approach to complex IT, HR, and business issues. Our consultants, including veteran IT

professionals and CXOs, work side by side with you and your team in a cooperative approach that delivers results and provides you with the tools you need for continued success.

Our Memberships

Info-Tech's membership options provide services tailored for each role and member, ensuring clients pay only for services they are using. Our desire is to exceed expectations in delivering business value through the optimal execution of IT strategies, governance, project management, applications, infrastructure, security, business intelligence, and various other IT- and HR-related disciplines.

How We'll Work With You

Info-Tech's team of in-house analysts are available to support you with your top issues, including process improvement and project management on technical issues as well as strategic and management issues. We work with our clients as subject matter experts, developers, collaborators, and partners, connecting with individuals at their pace, not ours. We understand that each working environment is unique, and one size does not fit all.

ITRG Advantage

The following describes how Info-Tech provides unmatched services via our subscription offerings:

- Research publications that are practical and built to execute on projects.
- A research taxonomy that is connected and provides comprehensive coverage.
- Content format that is visual and built upon framework-driven content.
- Analyst calls are structured to be a series of calls to complete key initiatives.
- Contract Review Services offer thorough contract assessments where the member always retains the savings.

- Executive services are outcome driven based upon personalized relationships.
- Our unique Concierge Services are high-impact, one-day consulting engagements.
- Benchmarking services are powerful diagnostic tools based on real data and included within memberships.
- Our Workshops are five-day facilitated engagements to solve our members' biggest issues/most-pressing projects and initiatives.
- Membership terms are designed to maximize usage and value.

ITRG's GSA Offering

ITRG's current GSA offering consists of the following:

- **Service Levels** include advisory services, research content, and digital experiences.
- **Consulting** provides expert practitioners and advisors to effectively outsource IT initiatives or projects with the knowledge, skills, and tools to deliver quality-driven value.
- **Software Licenses** – myPolicies is an online policy management and administration software that streamlines the creation, approval, distribution, and monitoring of corporate policies, procedures, and forms.

GSA Offering – Service Levels (SIN 54151S)

F23 Pricing

SIN	MFR Part No.	Product Group	Product Name	Product Description	Discount Price Offered to GSA (Including IFF)
54151S	23-009	Executive & Leadership Service Levels	CIO Counselor Membership	Key Membership Features: <ul style="list-style-type: none"> • A dedicated Executive Counselor to help you reach your goals and excel as a leader • 4 Onsite/Virtual Counselor visits (2 additional sessions) • IT Spend & Staffing Benchmarking against industry peers (Online) • IT Cost Analysis & Optimization roadmap focused on optimizing your IT Spending & Staffing (Onsite) • Unlimited IT Vendor Price Benchmarking • IT Vendor Negotiation Assistance for 4 contracts (1 additional) • Two Info-Tech LIVE Tickets (1 additional) • PLUS: All features of the Executive Counselor Membership are included 	\$93,803.53
54151S	23-008	Executive & Leadership Service Levels	Executive Counselor Membership	Key Membership Features: <ul style="list-style-type: none"> • A dedicated Executive Counselor to help you reach your goals and excel as a leader • 2 Onsite/Virtual Counselor visits (1 additional session) • Unlimited access to Concierge Services • 360° Personal Evaluation & Coaching Program to advance your career • Boardroom-level communication support • IT Spend & Staffing Benchmarking against industry peers (Online) • Unlimited IT Vendor Price Benchmarking • IT Vendor Negotiation Assistance for 3 contracts (1 additional) • Access to Industry Research & Advisory • PLUS: All features of the Counselor Membership are included 	\$62,216.62
54151S	23-007	Executive & Leadership Service Levels	Counselor Membership	Key Membership Features: <ul style="list-style-type: none"> • A dedicated Executive Counselor • 1 Onsite/Virtual Counselor Visit • Unlimited Software Selection Engagements • Unlimited IT Vendor Price Benchmarking • IT Vendor Negotiation Assistance for 2 contracts • Front of the Line Analyst Access • PLUS: All features of the "Advisory" Membership are included 	\$46,901.76

F23 Pricing

54151S	23-011	In-Depth Technical Advisory & Research	CFO Technology Counselor Membership	<p>Key Membership Features:</p> <ul style="list-style-type: none"> • A dedicated CFO Technology Counselor with CFO and IT Financial Management experience • 1 Onsite/Virtual Counselor Working Session • Unlimited IT Vendor Price Benchmarking • IT Vendor Negotiation Assistance for 3 contracts <p>With choice between:</p> <ul style="list-style-type: none"> • IT Spend & Staffing Benchmarking against industry peers (Online) OR • IT Cost Analysis & Optimization roadmap focused on optimizing your IT Spending & Staffing (Online) <ul style="list-style-type: none"> • Access to Industry Research & Advisory • One Info-Tech LIVE ticket 	\$71,788.41
54151S	23-010	In-Depth Technical Advisory & Research	Technical Counselor Membership	<p>Key Membership Features:</p> <ul style="list-style-type: none"> • IT role-specific professional development program with dedicated one-on-one Technical Counselors • 2 Onsite/Virtual Counselor Working Sessions • Unlimited IT Vendor Price Benchmarking • IT Vendor Negotiation Assistance for 3 Contracts • Unlimited access to Concierge Services • One Info-Tech LIVE ticket • 360° Personal Evaluation & Coaching Program • Access to Industry Research & Advisory 	\$62,216.62
54151S	23-005	Executive & Leadership Service Levels	Advisory Membership	<p>Key Membership Features:</p> <ul style="list-style-type: none"> • A Key Initiative Plan to ensure you get the most out of your membership • Unlimited analyst calls to help you through your most challenging projects • Full access to all diagnostic benchmarking programs • Access to Virtual Industry Roundtable Meetings • One Info-Tech LIVE ticket • One annual Software Selection Engagement 	\$24,886.65
54151S	23-004	Small Enterprise Service Levels & Add Ons	Small Enterprise Advisory Membership	<p>Membership Features:</p> <ul style="list-style-type: none"> • A Key Initiative Plan to ensure you get the most out of your membership • Unlimited analyst calls to help you through your most challenging projects • Full access to all diagnostic benchmarking programs • One annual Software Selection Engagement • One Contract Review, IT Vendor Price Benchmarking, or IT Vendor Negotiation engagement • Access to Virtual Industry Roundtable & Networking Engagements <p>Only applicable to Small Enterprise Size Segmentation</p>	\$17,612.09

F23 Pricing

54151S	23-035	Team Service Levels & Add Ons	Industry Research & Advisory	<ul style="list-style-type: none"> Unrestricted Access to industry-specific content and benchmarking for all members on Account Unlimited access to industry experts and advisory services tailored to your industry <p>Coverage includes: Government, Professional Services, Financial Services, Retail & Wholesale, Professional Associations, Transportation & Warehousing, Gaming & Hospitalities, Media & Information, Arts & Entertainment, Manufacturing, Education, Healthcare, Utilities, Construction, Mining, Real Estate, Food & Beverage, Agriculture</p>	\$21,632.24
54151S	23-036	Small Enterprise Service Levels & Add Ons	Small Enterprise Industry Research & Benchmarking	<ul style="list-style-type: none"> Unrestricted Access to Industry Industry-Specific Content and Benchmarking for All Members on Account Unlimited Access to Industry Experts and Advisory Services Tailored to Your Industry <p>Coverage includes: Government, Professional Services, Financial Services, Retail & Wholesale, Professional Associations, Transportation & Warehousing, Gaming & Hospitalities, Media & Information, Arts & Entertainment, Manufacturing, Education, Healthcare, Utilities, Construction, Mining, Real Estate, Food & Beverage, Agriculture</p> <p>Only applicable to Small Enterprise Size Segmentation</p>	\$5,982.37
54151S	23-030	Team Service Levels & Add Ons	Concierge Services	<ul style="list-style-type: none"> Unlimited Access to 20+ High Impact, Pre-scoped Consulting Engagements. A Powerful Set of Quick Advisory Experience with Onsite or Online Delivery 	\$21,632.24
54151S	23-101	Team Service Levels & Add Ons	Team Membership	<p>Key Membership Features:</p> <ul style="list-style-type: none"> Unlimited access to all IT Project and Process Research methodologies Unlimited Access to Library Tools and Templated Library Access to the Info-Tech Academy online eLearning platform Unlimited software selection content & reports Online IT Leadership Training and Development Program 	\$3,733.00
54151S	23-103	In-Depth Technical Advisory & Research	HIPO Technology Team Membership	<p>HIPO = High Potential. This is a bundle package of 10 seats.</p> <p>The HIPO Memberships require 1 counselor membership or above. These memberships are sold to high-potential IT staff in the member organization to give them exposure to our content as well as analysts. It should not be sold to an executive in the IT department.</p> <p>Key Membership Features:</p> <ul style="list-style-type: none"> Unrestricted access to all IT project and process research methodologies Unlimited access to our library of tools and templates Access to the Info-Tech Academy online eLearning platform Unlimited software selection content and reports 	\$22,015.11

F23 Pricing

54151S	23-012	In-Depth Technical Advisory & Research	HIPO Technology Advisory Membership	<p>HIPO = High Potential. This is a bundle package of 10 seats.</p> <p>The HIPO Memberships require 1 counselor membership or above. These memberships are sold to high-potential IT staff in the member organization to give them exposure to our content as well as analysts. It should not be sold to an executive in the IT department.</p> <p>Key Membership Features:</p> <ul style="list-style-type: none"> • Unlimited access to analysts for IT Management & Governance Process related topics • Unrestricted access to all IT project and process research methodologies • Unlimited access to our library of tools and templates • Access to the Info-Tech Academy online eLearning platform • Unlimited software selection content and reports • Access to Virtual Industry Roundtable Meetings 	\$64,130.98
54151S	WSHOP23-005	Workshop Add-Ons	Online Workshop Membership	<p>5 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.</p> <p>Delivery: Online Purchase: Annual subscription</p>	\$21,632.24
54151S	WSHOP23-006	Workshop Add-Ons	Standalone Online Workshop	<p>5 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.</p> <p>Delivery: Online Purchase: One-time</p>	\$24,886.65
54151S	WSHOP23-007	Workshop Add-Ons	Onsite Workshop Membership	<p>5 Day Onsite 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.</p> <p>Excludes Travel</p> <p>Delivery: Onsite Purchase: Annual subscription</p>	\$30,725.44
54151S	WSHOP23-008	Workshop Add-Ons	Standalone Onsite Workshop	<p>5 Day Onsite 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.</p> <p>Excludes Travel</p> <p>Delivery: Onsite Purchase: One-time</p>	\$33,979.85

F23 Pricing

54151S	WSHOP23-001	Small Enterprise Service Levels & Add Ons	Small Enterprise Workshop Membership	3-Day Analyst-Facilitated Workshop to help you complete your most critical project. Choose from a select catalog of workshops designed for the Small Enterprise. Delivery: Online only Purchase: Annual subscription	\$14,261.96
54151S	WSHOP23-002	Small Enterprise Service Levels & Add Ons	Small Enterprise Online Workshop (Standalone)	3-Day Analyst-Facilitated Workshop to help you complete your most critical project. Choose from a select catalog of workshops designed for the Small Enterprise. Delivery: Online only Purchase: One-time	\$16,367.76
54151S	WSHOP23-003	Workshop Add-Ons	Online Enterprise Workshop Membership	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. Delivery: Online Purchase: Annual subscription	\$38,287.15
54151S	WSHOP23-004	Workshop Add-Ons	Standalone Online Enterprise Workshop	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. Delivery: Online Purchase: One-time	\$44,030.23
54151S	WSHOP23-009	Workshop Add-Ons	Online to Onsite Workshop (Standalone) Upgrade	Upgrade a standalone online workshop to a standalone onsite workshop.	\$9,093.20
54151S	WSHOP23-010	Workshop Add-Ons	Online to Onsite Workshop Membership Upgrade	Upgrade an online workshop membership to an onsite workshop membership.	\$9,093.20

F23 Pricing

54151S	23-051	Cybersecurity Workforce Development Add-Ons	Cybersecurity Workforce Development – Analysts	<p>A 6-month expert-facilitated development program to develop critical cybersecurity skills missing within IT organizations through a combination of live virtual lectures, practical exercises, and cyber range labs.</p> <p>Analyst program track features:</p> <ul style="list-style-type: none"> • Personalized Development Plan • Development Scorecard • Up to 5 practical deliverables customizable to operational use • Focus on tactical cybersecurity implementation <p>Delivery: Online, quarterly start dates</p>	\$9,093.20
54151S	23-050	Cybersecurity Workforce Development Add-Ons	Cybersecurity Workforce Development – Leaders	<p>A 6-month expert-facilitated development program to develop critical cybersecurity skills missing within IT organizations through a combination of live virtual lectures, practical exercises, and cyber range labs.</p> <p>Leader program track features:</p> <ul style="list-style-type: none"> • Personalized Development Plan • Development Scorecard • Up to 5 practical deliverables customizable to operational use with hands-on support • Focus on strategic cybersecurity business alignment, program management, and governance • 1:1 Coaching with a dedicated Cybersecurity Advisor • Security Leadership Playbook to become a world-class CISO • Custom Key Initiative Plan for maturing a security program <p>Delivery: Online, quarterly start dates</p>	\$26,801.01
54151S	23-006-LEG	Executive & Leadership Service Levels	Legacy Leadership Membership	<p>Legacy Leadership Membership: Unlimited analyst calls, full diagnostic access, contract reviews, assigned Executive Advisor, 1 Software Selection Engagement per year.</p> <p>Available for renewal only</p>	\$26,801.01

Available Promotions & Size Segmentation Definition

ITRG offers to GSA the following additional quantity/volume discounts and concessions.

Quantity / Volume Discounts	Info-Tech Research Group offers the following discounts for bundle purchases to GSA eligible ordering activities.
	Enterprise Flexible Bundle Discount Additional Bundle Discount offered to GSA approved prices: 5% Minimum Spend: \$180,000 (These minimums take into account 5% GSA discount and the additional 5% bundle discount).
	M/L Flexible Bundle Discount Additional Discount offered to GSA approved prices: 5% Minimum Spend: \$100,000 (These minimums take into account 5% GSA discount and the additional 5% bundle discount).
	M/L Flexible Bundle (Basic) Discount Additional Discount offered to GSA approved prices: 5% Minimum Spend: \$70,000 (These minimums take into account 5% GSA discount and the additional 5% bundle discount).

Other Discounts / Concessions	Info-Tech Research Group offers the following discounts for bundle purchases to GSA eligible ordering activities.
	Small Flexible Bundle (Basic) Discount Additional Discount offered to GSA approved prices: 5% Minimum Spend: \$40,000 (These minimums take into account 5% GSA discount and the additional 5% bundle discount).
	Multi-Year Discount Additional Discounts, ranging from 2% - 5%, offered on GSA approved prices for procuring service level memberships for multiple years. The multi-year discounts are cumulative on the other discounts offered.
	SE Non-Advisory Upgrade (available to current ITRG GSA buyers): Any SE accounts currently without Advisory/Analyst access can be sold an SE Advisory Membership for \$13,000 USD (inclusive of IFF). Cannot be combined with Team Bundle volume discounts. Can be combined with multi-year commitment discounts.

Size Segmentation Definition

Pricing	Size	City Population	County Population	Higher Education Student Population
Small Enterprise Pricing	Small Enterprise	0 to 75K Pop.	0 to 250K Pop.	0 to 5K FTE Students
Standard Pricing	Medium/Large	Over 75K Pop.	Over 250K Pop.	Over 5K FTE Students
	Enterprise	Over 450K Pop.	Over 700K Pop.	Over 30K FTE Students

Membership Features

	CIO Counselor Membership	Executive Counselor Membership	Technical Counselor Membership	Counselor Membership	Advisory Membership	Team Membership
Service Delivery						
Dedicated Executive Counselor	✓	✓	✓	✓		
Onsite or Virtual Counselor Visits	4/year	2/year	2/year	1/year		
Custom Key Initiative Plan	✓	✓	✓	✓	✓	
Advisory Services						
IT Cost Analysis & Optimization (or Onsite Std. Workshop)*	✓**					
IT Spend & Staffing Benchmarking – Online*	✓**	✓				
Expanded Industry Advisory Access	✓	✓	✓			
Concierge Services	✓	✓	✓			
Software Selection as a Service	Unlimited	Unlimited	Unlimited	Unlimited	1/year	
Contract Review Service	Unlimited	Unlimited	Unlimited	Unlimited		
IT Vendor Price Benchmarking	Unlimited	Unlimited	Unlimited	Unlimited		
IT Vendor Negotiation Assistance	4	3	3	2		
Analyst Calls	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	
Info-Tech LIVE Conference Ticket	2 tickets	1 ticket	1 ticket	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 Programs	✓	✓	✓	✓	✓	
IT Metrics Dashboard	✓	✓	✓	✓	✓	
Industry Roundtables – Virtual	✓	✓	✓	✓	✓	
360-Degree Feedback Tool	✓	✓				

* Standard offering included covers commercial organizations with revenues under \$1 billion in revenue or public institutions with budgets under \$1 billion.

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

Membership Features

	CFO Technology Counselor Membership	Technical Counselor Membership	HIPO Technology Advisory Membership	HIPO Technology Team Membership
Service Delivery				
Dedicated Executive Counselor	✓	✓		
Onsite or Virtual Counselor Visits	1/year	2/year		
Custom Key Initiative Plan	✓	✓	✓	
Advisory Services				
IT Cost Analysis & Optimization (or Onsite Std. Workshop)*	✓			
IT Spend & Staffing Benchmarking - Online*	✓			
Expanded Industry Advisory Access	✓	✓		
Concierge Services		✓		
Software Selection as a Service	Unlimited	Unlimited		
Contract Review Service	Unlimited	Unlimited		
IT Vendor Price Benchmarking	Unlimited	Unlimited		
IT Vendor Negotiation Assistance	3	3		
Analyst Calls	Unlimited	Unlimited	IT Process Related Calls (M&G Framework)	
Info-Tech LIVE Conference Ticket	1 Ticket	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 Programs	✓	✓		
IT Metrics Dashboard	✓	✓		
Industry Roundtables - Virtual		✓		
360-Degree Feedback Tool		✓		

* Standard offering included covers commercial organizations with revenues under \$1 billion in revenue or public institutions with budgets under \$1 billion.

SE Membership Features

	CIO Counselor Membership	Executive Counselor Membership	Counselor Membership	SE Advisory Membership	Team Membership
Service Delivery					
Dedicated Executive Counselor	✓	✓	✓		
Onsite or Virtual Counselor Visits	4/year	2/year	1/year		
Custom Key Initiative Plan	✓	✓	✓	✓	
Advisory Services					
IT Cost Analysis & Optimization (or Onsite Std. Workshop)*	✓**				
IT Spend & Staffing Benchmarking – Online*	✓**	✓			
Expanded Industry Advisory Access	✓	✓			
Concierge Services	✓	✓			
Software Selection as a Service	Unlimited	Unlimited	Unlimited	1/year	
Contract Review Service	Unlimited	Unlimited	Unlimited	1/year	
IT Vendor Price Benchmarking	Unlimited	Unlimited	Unlimited		
IT Vendor Negotiation Assistance	4	3	2		
Analyst Calls	Unlimited	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 Programs	✓	✓	✓	✓	
IT Metrics Dashboard	✓	✓	✓	✓	
Industry Roundtables – Virtual	✓	✓	✓	✓	
360-Degree Feedback Tool	✓	✓			

* Standard offering included covers commercial organizations with revenues under \$1 billion in revenue or public institutions with budgets under \$1 billion.

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

Product & Feature Definitions

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 or Virtual 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 their 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 with 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 to ensure success.
Advisory Services	
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. Prerequisite service: IT Spend & Staffing Benchmarking.
IT Spend & Staffing Benchmarking – Online	An online service where 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. Prerequisite for IT Cost Analysis & Optimization.
Industry Advisory Access	Unlimited phone access to our team of industry experts to guide members through our industry research content 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 contracts experts who will conduct a business review of the Terms & Conditions and provide a comprehensive written summary of feedback.
IT Vendor Price Benchmarking	Access to our IT Vendor Price Benchmarking experts who will conduct a business review of the pricing and provide feedback on market competitiveness of your deal.
IT Vendor Negotiation Assistance	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.
Analyst Calls	Unlimited phone access to our team of subject matter experts to guide members through their most challenging technology projects. An analyst from the team who wrote the research works with you at key project milestones to advise, coach, and offer insight.
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	In-depth, industry-specific research content that includes benchmarking reports, trends analysis, technology evaluations, and reference architectures.
Technology Project Research	Over 450 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 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 nine 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 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 monthly virtual industry roundtable discussions and peer networking to explore common challenges, share best practices, and help shape our industry research agenda.
360-Degree 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 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:

- Four Onsite/Virtual Counselor Visits
- Custom Key Initiative Plan
- Designated Executive Counselor

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

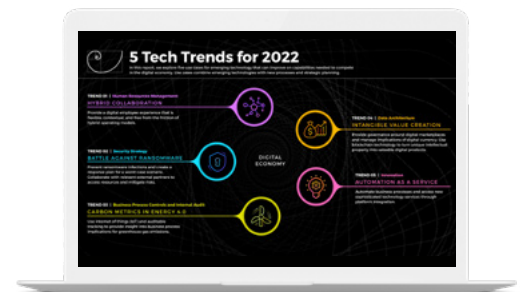
In-depth, industry-specific research content that includes benchmarking reports, trends analysis, technology evaluations, and reference architectures.

Also Includes:

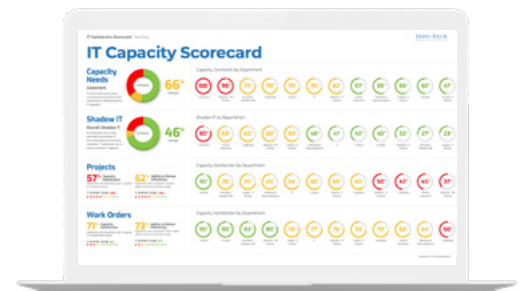
- People & Leadership Research



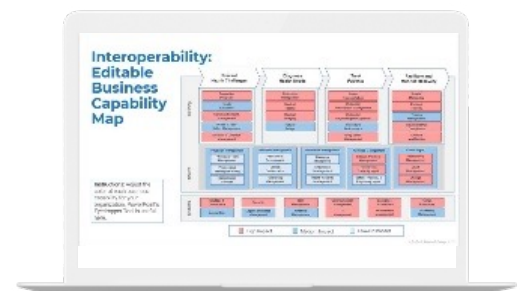
Sample Key Initiative Plan



Sample Trends Report



Sample Diagnostic Report



Sample Industry Content

CIO Counselor Membership

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. IT Spend & Staffing Benchmarking is a prerequisite to this service. 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 you at key project milestones to advise, coach, and offer insight.

Digital Experiences

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.

Also Includes:

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

Industry Research & Advisory

In-depth, industry-specific research content and advisory service that includes benchmarking reports, trends analysis, technology evaluations, reference architectures, and unlimited phone access to our team of industry subject matter experts.

IT Vendor Price Benchmarking & Negotiation Assistance

Access to our IT pricing experts and exclusive negotiation intelligence to achieve best-in-circumstance deals on contracts with a value over \$1M with over 40 major IT vendors. IT Vendor Negotiation Assistance for up to 4 contracts included with membership.

Also Includes:

- Concierge Services
- Software Selection as a Service



Sample
Diagnostic
Report

Executive Counselor Membership

The Executive Counselor is one of our top memberships, designed to help CIOs and IT leaders deliver value, achieve goals, and improve and grow the contributions of IT. It includes all People & Leadership content required to manage the department and develop as a leader.

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:

- Two Onsite/Virtual Counselor Visits
- Custom Key Initiative Plan
- Designated Executive Counselor

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.

McLean & Company HR Research

Unlimited access to all human resources research content through our HR division, McLean & Company.

Also Includes:

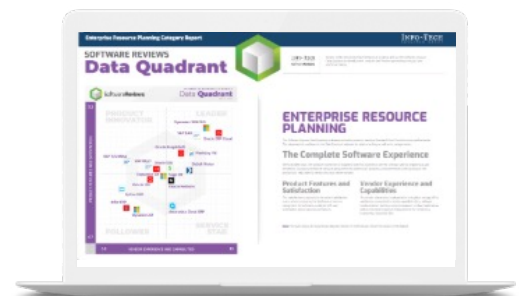
- People & Leadership Research
- Access to Industry Analysts & Research



Sample Key Initiative Plan



Sample Template



Sample Data Quadrant Report

Executive Counselor Membership

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.

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 you 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, reference architectures, and unlimited phone access to our team industry subject matter experts.

IT Vendor Price Benchmarking & Negotiation Assistance

Access to our IT pricing experts and exclusive negotiation intelligence to achieve best-in-circumstance deals on contracts with a value over \$1M with over 40 major IT vendors. IT Vendor Negotiation Assistance for up to 3 contracts included with membership.

Also Includes:

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

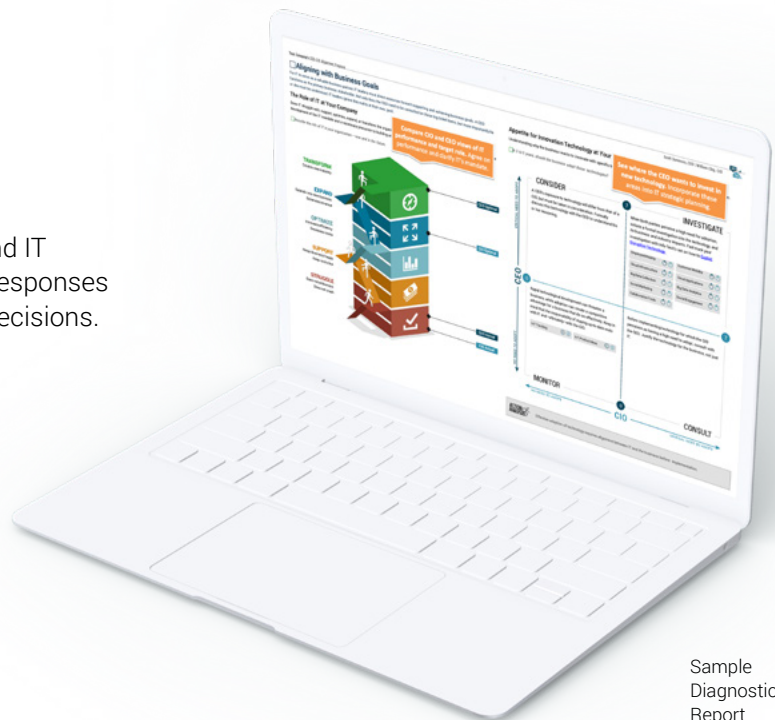
Digital Experiences

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.

Also Includes:

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



Sample
Diagnostic
Report

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:

- One Onsite/Virtual Counselor Visit
- Custom Key Initiative Plan
- Designated Executive Counselor

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.

Also Includes:

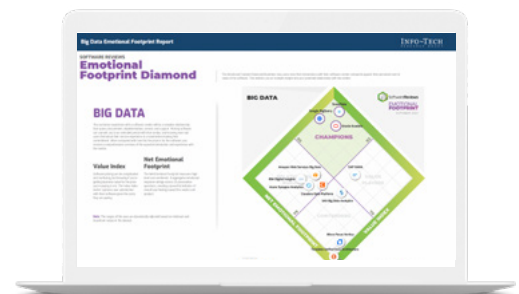
- People & Leadership Research
- IT Process Research



Sample Key Initiative Plan



Sample Template



Sample Emotional Footprint

Counselor Membership

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 you 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 Assistance

Access to our IT pricing experts and exclusive negotiation intelligence to achieve best-in-circumstance deals on contracts with a value over \$1M with over 40 major IT vendors. IT Vendor Negotiation Assistance for up to 2 contracts included with membership.

Also Includes:

- Price Benchmarking & Negotiation for 2 Contracts
- Info-Tech LIVE Ticket

Digital Experiences

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.

Info-Tech Academy Training Platform

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

Also Includes:

- IT Metrics Dashboard
- Leadership Development Program



Sample
Diagnostic
Report

CFO Technology Counselor Membership

The CFO Technology Counselor Membership is designed to help finance leaders manage technology business units and digitally transform their finance organization. This membership provides CFOs with the services of a dedicated finance and technology specialist to help them drive value through technology within their organization.

Service Delivery

Dedicated Executive Counselor With Finance and IT Experience

Members receive personalized and confidential one-on-one support from a veteran CFO Technical Counselor with deep financial and IT management experience to achieve their financial and IT goals and navigate technology leadership and tech cost optimization.

Also Includes:

- One Onsite/Virtual Counselor Visit
- Custom Key Initiative Plan
- Designated Account Manager

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:

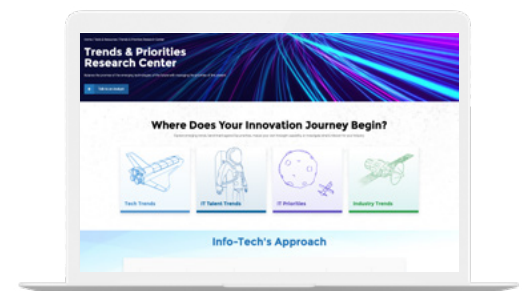
- People & Leadership Research
- IT Process Research



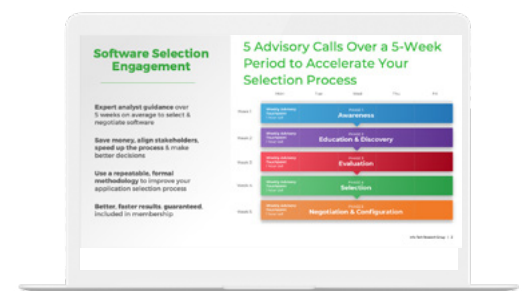
Sample Key Initiative Plan



Sample Concierge Experience



Sample Research



Sample Methodology

CFO Technology Counselor Membership

Advisory Services

IT Spend & Staffing Benchmarking or IT Cost Analysis

Access to either IT Spend & Staffing Benchmarking to help map out costs and provide transparency into current IT spending, or the IT Cost Analysis & Optimization service to identify IT cost optimization initiatives and build an IT cost optimization strategy.

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 you 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, reference architectures, and unlimited phone access to our team of industry subject matter experts.

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.

Also Includes:

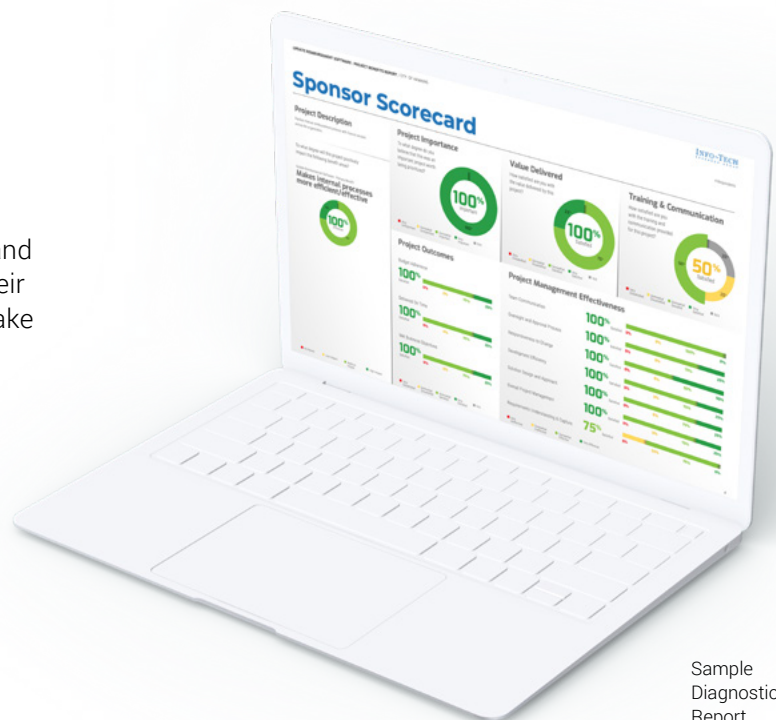
- Info-Tech Academy Training Platform
- IT Metrics Dashboard
- Leadership Development Program
- 360-Degree Feedback Tool

IT Vendor Price Benchmarking & Negotiation Assistance

Access to our IT pricing experts and exclusive negotiation intelligence to achieve best-in-circumstance deals on contracts with a value over \$1M with over 40 major IT vendors. IT Vendor Negotiation Assistance for up to 3 contracts included with membership.

Also Includes:

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



Sample
Diagnostic
Report

Technical Counselor Membership

The Technical Counselor Membership is designed to help IT leaders deliver value, achieve goals, and improve and grow the contributions of IT with a focus on technical excellence. It also includes all People & Leadership content required to manage a team and develop as a leader.

Service Delivery

Dedicated Technical Counselor

Members receive personalized and confidential one-on-one support from a seasoned IT executive to enhance their technical expertise, achieve their goals, and prepare for the next chapter of their career.

Also Includes:

- Two Onsite/Virtual Counselor Visits
- Custom Key Initiative Plan
- Designated Account Manager

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:

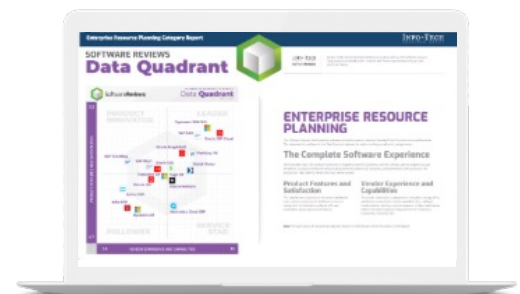
- IT Process Research

Technical Domains

Applications
Infrastructure & Operations
Security
Data & Analytics
Enterprise Architecture
Privacy
Project Management Office (PMO)
Vendor Management
Service Management



Sample Template



Sample Data Quadrant Report

Technical Counselor Membership

Advisory Services

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 you 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, reference architectures, and unlimited phone access to our team of industry subject matter experts.

IT Vendor Price Benchmarking & Negotiation Assistance

Access to our IT pricing experts and exclusive negotiation intelligence to achieve best-in-circumstance deals on contracts with a value over \$1M with over 40 major IT vendors. IT Vendor Negotiation Assistance for up to 3 contracts included with membership.

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.

Also Includes:

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

Also Includes:

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



Sample
Diagnostic
Report

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 with their initiatives.

Also Includes:

- Custom Key Initiative Plan
- Designated Account Manager

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:

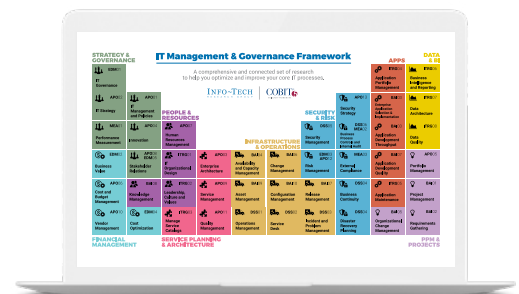
- IT Process Research



Sample Key Initiative Plan



Sample Template



IT Management & Governance Framework

Advisory Membership

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.

Also Includes:

- Info-Tech LIVE Ticket

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 you at key project milestones to advise, coach, and offer insight.

Digital Experiences

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.

Info-Tech Academy Training Platform

An online learning management platform with 100+ hours of video content, 50+ quizzes, and nine 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
Diagnostic
Report

SE Advisory Membership

The SE 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 with their initiatives.

Also Includes:

- Custom Key Initiative Plan
- Designated Account Manager

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:

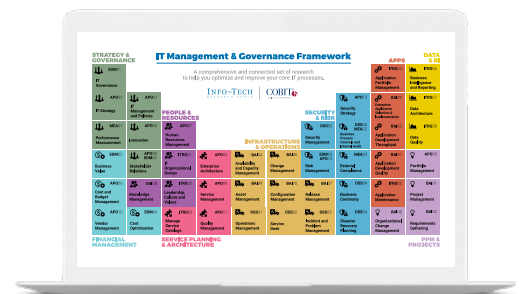
- IT Process Research



Sample Key Initiative Plan



Sample Template



IT Management & Governance Framework

SE Advisory Membership

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 you at key project milestones to advise, coach, and offer insight.

Contract Review + Price Benchmarking & Negotiation (1/year)

Access to our IT contracts experts, who will conduct a business review of the Terms & Conditions as well as provide exclusive negotiation intelligence to achieve best-in-circumstance deals on contracts with a value over \$1M with over 40 major IT vendors.

Digital Experiences

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.

Info-Tech Academy Training Platform

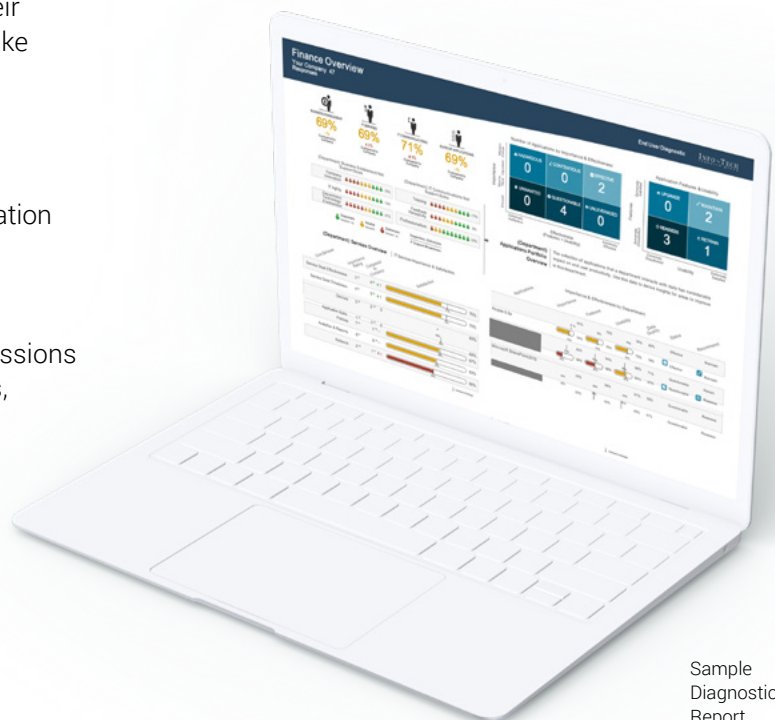
An online learning management platform with 100+ hours of video content, 50+ quizzes, and nine certification programs.

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
Diagnostic
Report

Concierge Services

Our Concierge Services are accelerated, pre-scoped consulting engagements designed to be delivered online or onsite.

Valuable Experiences Tailored to Your Needs

Every Concierge Service is built to provide practical, custom solutions to real pain points experienced by IT leaders.

Our Analysts Do the Heavy Lifting

With minimal time commitment on your part, our subject matter experts will lead the service and produce all final deliverables.

Get Tangible Results Fast

From the initial booking to the final handoff, these engagements can be completed in a matter of days – not weeks!

Highly Polished Deliverables

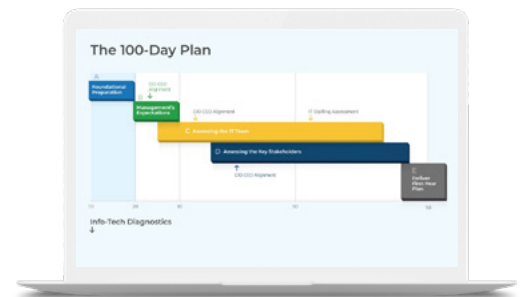
You'll leave each Concierge Service with a set of visually stunning client deliverables you will be excited to share with your boss.

What do our members say?

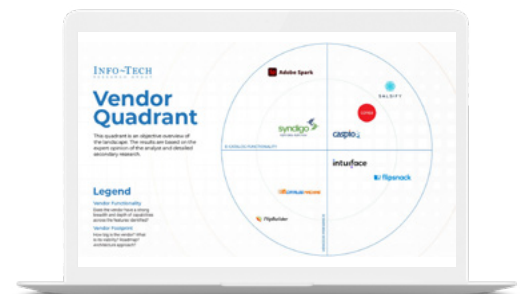
“The best part is having an independent point of view from experienced consultants that help us enhance and fine-tune our deliverables in a way that meets best standards and practices.”



Sample from IT Strategy Visualization Service



Sample from First 100 Days as CIO



Sample from Custom Vendor Landscape

Industry Research & Advisory Services

Info-Tech's Industry Research & Advisory program aims to build alignment between IT leaders and the business they serve. It adds a layer of industry insight and research depth that better meets IT and business leaders where they are in their specific context within their specific industry.

Research Content

Industry-Specific Research

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

Advisory Services

Unlimited Analyst Calls With Industry Analysts

Unlimited phone access to our team of industry experts to guide you through your most challenging initiatives and strategic considerations.

Executive Peer Group Discussions

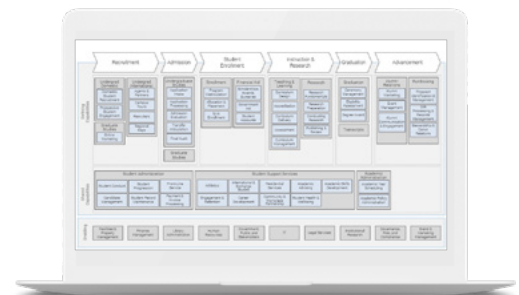
Join IT leaders discussing pertinent topics within their respective industries to validate their approaches with their peers. Focus on gaining insight, networking, and building strong connections among a consistent group of attendees.

Linking Business & IT Value Maps

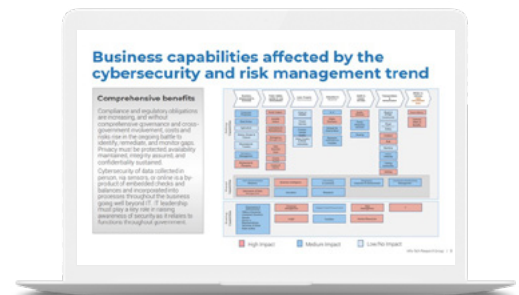
Draw clear connections between the business' strategic objectives and IT programs and initiatives. This is a crucial exercise in demonstrating the role of IT and positioning IT as a business partner.

Digital Transformation

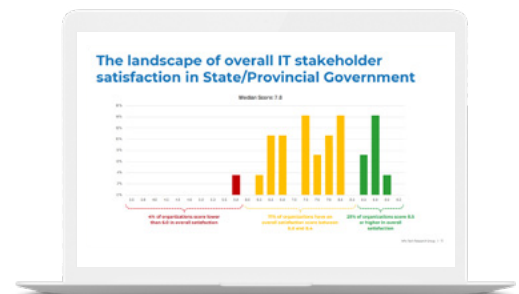
Form a solid understanding of your industry's value streams, unique capabilities, and business and technology trends to be able to lead and deliver on digital transformation initiatives.



Sample Reference Architecture



Sample Trend Analysis



Sample IT Satisfaction Benchmarking Report Excerpt

Industry Research & Advisory Services (Small Enterprise)

Info-Tech's Industry Research & Advisory program aims to build alignment between IT leaders and the business they serve. It adds a layer of industry insight and research depth that better meets IT and business leaders where they are in their specific context within their specific industry.

Research Content

Industry-Specific Research

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

Advisory Services

Unlimited Analyst Calls With Industry Analysts

Unlimited phone access to our team of industry experts to guide you through your most challenging initiatives and strategic considerations.

Executive Peer Group Discussions

Join IT leaders discussing pertinent topics within their respective industries to validate their approaches with their peers. Focus on gaining insight, networking, and building strong connections among a consistent group of attendees.

Linking Business & IT Value Maps

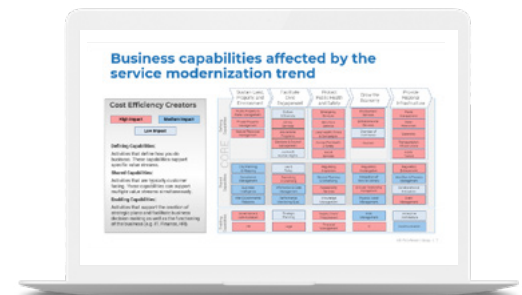
Draw clear connections between the business' strategic objectives and IT programs and initiatives. This is a crucial exercise in demonstrating the role of IT and positioning IT as a business partner.

Digital Transformation

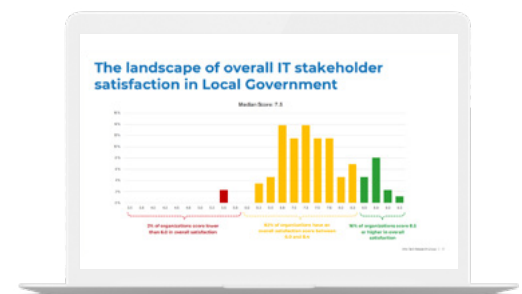
Form a solid understanding of your industry's value streams, unique capabilities, and business and technology trends to be able to lead and deliver on digital transformation initiatives.



Sample Reference Architecture



Sample Trend Analysis



Sample IT Satisfaction Benchmarking Report Excerpt

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 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.



Sample Video



Sample Template



Sample Blueprint

Team Membership

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 nine certification programs.



Info-Tech
Academy
Training
Platform

HIPO Technology Advisory Membership

The HIPO Technology Advisory Membership is designed for high-potential IT staff as they complete projects and improve processes by leveraging our team of expert analysts and world-class research. It includes our basic content and services within our IT Process related research areas (M&G Framework) and is a great way for IT employees to experience and leverage the core services of Info-Tech.

Service Delivery

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 to ensure success.

Also Includes:

- Designated Account Manager

Research Content

IT Process Research

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

Tools & Templates Library

Over 200 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

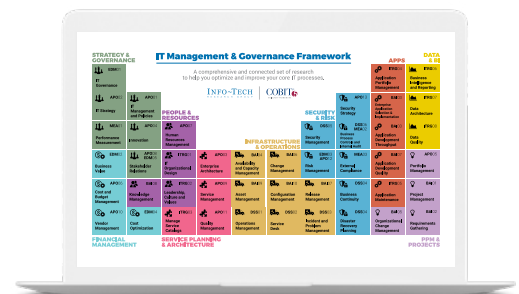
Strategies on how to lead teams effectively and resources proven to help you become a better manager.



Sample Key Initiative Plan



Sample Template



IT Management & Governance Framework

HIPO Technology Advisory Membership

Advisory Services

Unlimited Analyst Calls (M&G Framework topics only)

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 you at key project milestones to advise, coach, and offer insight.

Also Includes:

- One Info-Tech LIVE Ticket

Digital Experiences

Info-Tech Academy Training Platform

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



Sample
Diagnostic
Report

HIPO Technology Team Membership

The HIPO Technology Team Membership is designed to help high-potential IT staff execute on projects and improve processes with world-class research, tools, and templates. It includes the core research products within our IT Process related research (M&G Framework) 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 you can leverage to help you excel in your role.

Research Content

IT Process Research

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

Tools & Templates Library

Over 200 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.



Sample Video



Sample Template



Sample Blueprint

HIPO Technology Team Membership

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 nine certification programs.



Info-Tech
Academy
Training
Platform

Workshops

Info-Tech Workshops are one-week collaborative problem-solving engagements that result in a practical and actionable deliverable.

- With methodologies built to scale, our Workshops fit organizations of all sizes and industries.
- We engage the right people at the right time to ensure we're making the most of your team's time.
- Nearly every blueprint has a Workshop option. With over 100 unique topics, the choice is yours.

Info-Tech's Top-Rated Member Experience With an Average Rating in 2022 of 9.4/10

All Time – Top 20 Most Delivered

- Build a Business-Aligned IT Strategy
- Build an Information Security Strategy
- Standardize the Service Desk
- Create a Right-Sized Disaster Recovery Plan
- Develop a PPM Strategy
- Create a Data Management Roadmap
- Cloud Strategy and Action Plan
- Establish Data Governance
- Tailor IT Project Management Processes to Fit Your Projects
- Design and Build a User-Facing Service Catalog
- Develop a Business Continuity Plan
- Create a Service Management Roadmap
- Optimize Change Management
- Improve Requirements Gathering
- Implement Agile Practices That Work
- Design an Enterprise Architecture Strategy
- Drive Real Business Value with an HRIS Strategy
- Improve IT Governance to Drive Results
- Build a Reporting and Analytics Strategy (BI Strategy)
- Build the Business by Building an Infrastructure Roadmap

What Do Our Members Say?

Workshops are consistently our top-rated member experience.

"This was an awesome workshop! **Extremely valuable for our team.** We walked away with tangible artifacts, a clear roadmap for next steps, and areas to further discuss/deep dive into. Our workshop facilitator did an excellent job ensuring my needs (as company leader) were addressed in pre-meetings – and then performed a superb job engaging everyone and keeping the flow moving. **My first real virtual workshop over multiple days (COVID-19) and it was a huge success.** Will look to book [a workshop] again for future areas of interest."

"Info-Tech's project team was organized and thoroughly professional. They were proactive, adaptable, and worked diligently to understand our expectations. **I was very impressed with the team and the quality of the delivered outputs.**"

Onsite delivery available for additional charge.

Enterprise Workshops

Info-Tech Enterprise Workshops are one-week customizable workshops designed specifically for our Enterprise level clients that result in a practical, actionable, and boardroom-ready deliverable.

Enterprise Workshops build on our proven Workshop program through four key added benefits:

Customizable to Address Your Most Pressing Problems

Using Info-Tech research and frameworks as the foundation, Enterprise Workshops allow for greater customization to ensure the engagement is scoped and delivered to the appropriate depth and breadth of your needs to address your most pressing problems.

Tailored to Your Unique Needs

Enterprise Workshops are delivered in one week but leverage seven dedicated days of effective effort by Info-Tech. We work with you to ensure the pre- and post-work performed by our experienced Workshop facilitators meets the unique needs of your organization.

Aligned to Your Industry

Enterprise Workshops provide you with a subject matter expert as well as an Industry specialist to ensure that the workshop deliverable is tailored for your business and industry.

Complete With a Boardroom-Ready Deliverable

Your final deliverable will include a boardroom-ready executive presentation, which can be presented by one of Info-Tech's expert facilitators upon request.

Top 10 Most Delivered Workshops (Enterprise Clients):

Build a Business-Aligned IT Strategy

Standardize the Service Desk

Create a Right-Sized DRP

Establish Data Governance

Build an Information Security Strategy

Create a Data Management Roadmap

Develop a PPM Strategy

Cloud Strategy and Action Plan

Improve IT Governance to Drive Results

IT Organizational Design

Small Enterprise Workshops

Info-Tech SE Workshops are three-day collaborative problem-solving engagements that result in a practical and actionable deliverable.

SE Workshops are designed specifically for small and emerging enterprises.

Leverage the Expertise of Experienced Facilitators

Learn from open discussion as workshop facilitators navigate and lead conversations with stakeholders, the business, and IT.

Aligned to Your Department's Goals & Needs

Workshops are tailored to your goals so we can apply the right best practices to get you where you need to be.

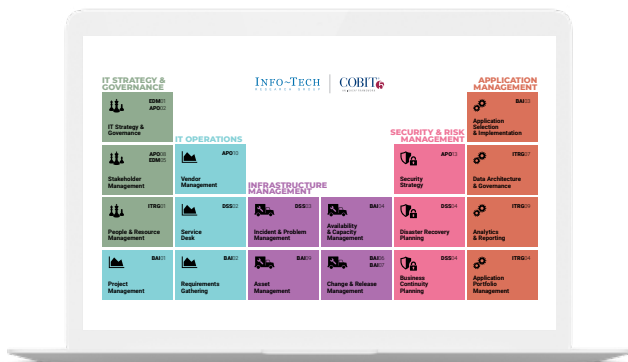
Optimize Limited Resources

Apply frameworks and methodologies that will get the most from your department.

Made to Match Your Maturity

Workshops meet you where you are at to apply a right-sized, best-practice approach to progress your organization.

Info-Tech's SE Workshop Catalog covers key components of the **SE Management & Governance Framework**.



Sample Topics From the SE Workshop Catalog

CIO

Strategy & Governance

- Build a Business-Aligned IT Strategy
- Redesign Your IT Organizational Structure

IT Operations

- Create a Service Management Roadmap
- Jump Start Your Vendor Management Initiative

Applications

Application Management

- Application Portfolio Management Foundations

PMO

IT Operations

- Develop a PPM Strategy

Data

Application Management

- Build a Robust and Comprehensive Data Strategy

Infrastructure & Operations

Infrastructure Management

- Define Your Cloud Vision
- Document Your Cloud Strategy

Information Security

Security & Risk Management

- Create a Right-Sized Disaster Recovery Plan
- Develop a Business Continuity Plan
- Build an Information Security Strategy

Cybersecurity Workforce Development – Analyst

A six-month expert-facilitated training program to develop critical cybersecurity skills missing within IT organizations through a combination of live virtual lectures, practical exercises, and cyber range labs. Registered learners produce deliverables for immediate application to real business needs and objectives of the client organization.

Develop critical cybersecurity skills missing within your team and organization through:

- Standardized curriculum with flexible projects tailored to business needs
- Realistic cyber range scenarios
- Ready-to-deploy security deliverables
- Real assurance of skill development

Sample program deliverables include:

- Vulnerability Assessment & Remediation Plan
- Threat & Risk Assessment Report
- Security Risk Register
- Data Classification Scheme
- Baseline Configuration Standard aligned with security policy
- Security Incident Response Runbook

Analyst program track features:

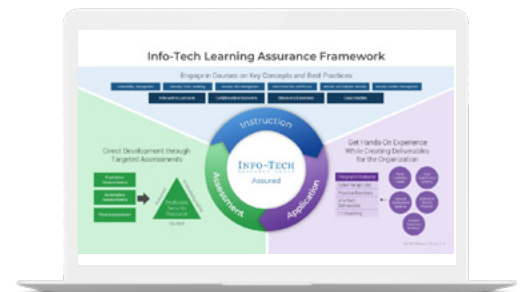
- Personalized Development Plan
- Development Scorecard
- Up to five practical deliverables customizable to operational use
- Focus on tactical cybersecurity implementation

Program Features:

- Live facilitated sessions
- Security analysts and leaders
- Average of 65 hours over six months
- Certificate and CPE credits



High-Level Program Overview



Info-Tech Learning Assurance Framework

Cybersecurity Workforce Development – Leader

A six-month expert-facilitated training program to develop critical cybersecurity skills missing within IT organizations through a combination of live virtual lectures, practical exercises, and cyber range labs. Registered learners produce deliverables for immediate application to real business needs and objectives of the client organization.

Develop critical cybersecurity skills missing within your team and organization through:

- Standardized curriculum with flexible projects tailored to business needs
- Realistic cyber range scenarios
- Ready-to-deploy security deliverables
- Real assurance of skill development

Sample program deliverables include:

- Vulnerability Assessment & Remediation Plan
- Threat & Risk Assessment Report
- Security Risk Register
- Data Classification Scheme
- Baseline Configuration Standard aligned with security policy
- Security Incident Response Runbook

Leader program track features:

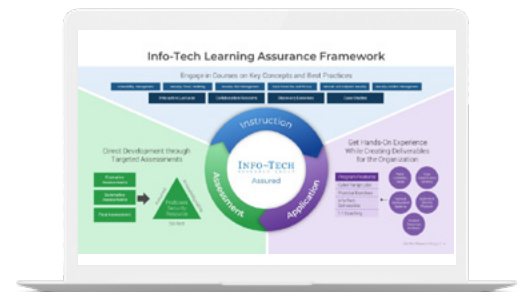
- Personalized Development Plan
- Development Scorecard
- Up to five practical deliverables customizable to operational use with hands-on support
- Focus on strategic cybersecurity business alignment, program management, and governance
- 1:1 Coaching with a dedicated Cybersecurity Advisor
- Security Leadership Playbook to become a world-class CISO
- Custom Key Initiative Plan for maturing a security program

Program Features:

- Live facilitated sessions
- Security analysts and leaders
- Average of 65 hours over six months
- Certificate and CPE credits



High-Level Program Overview



Info-Tech Learning Assurance Framework

Legacy Leadership Membership

The Leadership Membership is designed to help IT leaders manage teams, improve processes, and save time with access to analysts and world-class research, services, tools, and templates. It includes our most popular content and services to execute on IT projects.

Service Delivery

Executive Advisor

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

Also Includes:

- Custom Key Initiative Plan
- Designated Account Manager

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

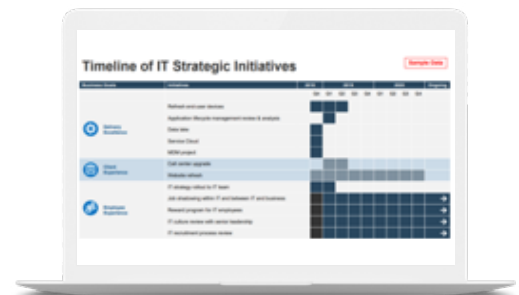
Strategies on how to lead teams effectively and resources proven to help you become a better manager.

Also Includes:

- IT Process Research



Sample Key Initiative Plan



Sample Template



Sample Data Quadrant Report

Legacy Leadership Membership

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 you at key project milestones to advise, coach, and offer insight.

Contract Review Service

Unlimited access to our IT contracts experts, who will provide members with a thorough assessment of the Terms & Conditions and proposed spending to help them get the best deal possible. The member receives a written summary of the notes and recommended next steps to optimize upcoming purchases and renewals.

Also Includes:

- Front-of-the-Line Analyst Access

Digital Experiences

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.

Info-Tech Academy Training Platform

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

Also Includes:

- Industry Roundtable – Virtual
- IT Metrics Dashboard
- Leadership Development Program



Sample
Diagnostic
Report

GSA Offering – Consulting (SIN 54151S)

Info-Tech Research Group is a full-service professional IT research, advisory, and professional services firm founded in 1997, with approximately 700 full-time employees throughout North America. Our services include technology-based business research, industry-specific reporting, best-practice methodologies, benchmarking, and market analysis research. Info-Tech offers a practical approach to complex technology and business issues.

Our consulting services provide you with expert practitioners and advisors throughout the duration of your engagement, enabling you to effectively outsource your IT initiative or project to those with the knowledge, skills, and tools to deliver quality-driven value. Info-Tech Consulting Services blends the insights of our more than 30,000 members with the market-approved talents and methodologies of our consulting staff to bring your organization a unique, powerful, and holistic professional services offering.

Leveraging the deep knowledge of our renowned research firm, our management consultants build practical, tactical, and actionable roadmaps for IT departments to harness the power of technology. Whether resolving complex issues or

accelerating projects, our custom engagements drive measurable results, not only in the next three to six months but also in the years beyond.

With decades of IT consulting experience, our principals have introduced cultures of innovation across various industries in public and private sectors, empowering IT professionals to execute and accelerate strategic initiatives that drive value for their organization at any stage.

As part of the world's fastest-growing IT research firm, our consultants are backed by a team of subject matter experts who have made careers of studying the nuances of IT, together spending 70,000 hours annually researching best practices, benchmarks, and trends across numerous industries.

Info-Tech Research Group Consulting – Scope

Info-Tech's Scope of Work is defined broadly by the following strategic and high-value activities:

CIO Services

Info-Tech can provide the client with advisory services pertaining to Strategy, Transformation, and Governance to build a forward-looking organization. Through its Strategy practice, Info-Tech can support leaders and executive teams by analyzing the client's current state of initiatives and processes, identifying key organizational priorities, and building a forward-oriented, business-aligned strategy. Info-Tech can also provide transformation support and support the client through times of change by outlining a future-oriented digital delivery model and aligned business models. Lastly, Info-Tech CIO Services also provides Governance advisory, which includes improving decision making and building alignment through process improvement, business-IT alignment, and policy management.

Data and Analytics/AI

Info-Tech can provide the client with analysis and recommendations for developing data and analytics/BI/AI strategies, governance, assessment/benchmarking, system selections, applied research, operating models, business cases, and implementation roadmaps/plans to better meet business objectives. Info-Tech can also assist the client with optimizing data management capabilities, including helping the client to mature data quality, metadata management, primary/reference data, data architecture, data modeling, data warehousing, and data integration. Info-Tech can provide advanced analytics/BI/AI capabilities to the client to enable better business insight and more effective decision making.

Infrastructure

Info-Tech can provide the client with the development of IT Infrastructure services working to develop an IT infrastructure strategy that is right for the client's needs. This includes IT cloud strategies, designs, roadmaps and selection services for infrastructure solutions encompassing pri-

vate/public/hybrid cloud services, data center migrations, secure remote work/unified communications, and business continuity planning and disaster recovery planning program management. Info-Tech can also assist with the complete IT infrastructure lifecycle from design to implementation, enabling the successful adoption of selected solutions.

Security

Info-Tech's cybersecurity-certified consultants, engineers, and analysts provide a vendor-agnostic and holistic approach to identifying, managing, and remediating organizational risk. Our cybersecurity practice introduces operational stability, data privacy, and digital brand protection. Using industry-recognized frameworks and best practices, our consultants deliver repeatable, affordable, and goals-orientated solutions that meet the most complex enterprise requirements. Info-Tech's core teams and partners are considered subject matter experts who have attained the highest industry certifications.

Independent Verification & Validation

Info-Tech can provide a variety of implementation/technical oversight and Independent Verification & Validation (IV&V) services. Using an adaptable methodology developed for the UN and vetted through public and private clients, our goal is to help ensure the success of your project. We holistically evaluate the management areas (program management, team structure, risk management, staffing levels, etc.), major technical areas (development methodologies, quality assurance, data migration management, etc.), and major communication areas (OCM, knowledge transfer, stakeholder management, etc.) to help the project meet its budgetary, scope, and timeline goals. We can adapt the methodology across virtually all moderate to large IT project types.

Vendor Management and Selection

Info-Tech can provide the client with Vendor advisory services including Vendor Management, Requirements Gathering, and Vendor Selection and Benchmarking. Info-Tech Vendor services can build a vendor strategy for the

client through interviews and analysis and identify recommendations to optimize or develop a Vendor Management program. Through its Requirements and Selection service, Info-Tech can support teams by building the case for change, evaluating key capabilities required, documenting functional and non-functional requirements aligned with the client's needs, and using our strategic selection framework to assist the client during the vendor selection phase. Additionally, Info-Tech also offers Market Assessment and Benchmarking services to assess the client's market/solution landscape and benchmarking in terms of capabilities and spend.

Enterprise Applications

Info-Tech can provide the client with the development of enterprise application strategies, roadmaps, and selection services for solutions including ERP, HCM/HRIS, CRM/CXM, and most other business applications. This includes

developing solution requirements, RFPs/RFQs, vendor validation, and solution/implementation partner recommendations. Info-Tech can also assist with implementation activities such as risk and change management, project management, business process design, and testing/training support to enable successful implementation and adoption of selected solutions. Additionally, Info-Tech can assist in the rationalization of your application portfolios and deliver a roadmap to achieve savings.

Item No.	GSA Schedule Labor Category	Minimum Education	Minimum Experience	Labor Category Description
1	Vice President	Master's	12 years	Lead and consult on large business process/technology transformation programs. Manage business unit/segment. Advise technology clients. Deliver improvements and cost savings. Recruit, develop, and manage teams. Deliver value to customers. Act as primary contact with client executives; plan and facilitate critical meetings. Support clients in defining agenda and/or corporate strategy. Develop account plans and take responsibility for the development and growth of strategic client accounts. Develop overall administrative, financial, and time commitments for multiple engagements; set overall goals and drive agendas to ensure goals are met. Manage multiple engagements and provide mentoring and guidance to project managers and team members. Perform engagement quality reviews and drive continuous improvement efforts. Act as a subject matter expert on engagements. Serve as a sounding board for engagement team's strategic direction. Provide executive leadership on sales calls and oversee multiple proposal development efforts.
2	Vice President 2	Master's	14 years	Lead and consult on large business process/technology transformation programs. Manage business unit/segment. Advise technology clients. Deliver improvements and cost savings. Recruit, develop, and manage teams. Deliver value to customers. Act as primary contact with client executives; plan and facilitate critical meetings. Support clients in defining agenda and/or corporate strategy. Develop account plans and take responsibility for the development and growth of strategic client accounts. Develop overall administrative, financial, and time commitments for multiple engagements; set overall goals and drive agendas to ensure goals are met. Manage multiple engagements and provide mentoring and guidance to project managers and team members. Perform engagement quality reviews and drive continuous improvement efforts. Act as a subject matter expert on engagements. Serve as a sounding board for engagement team's strategic direction. Provide executive leadership on sales calls and oversee multiple proposal development efforts.
3	Vice President 3	Master's	16 years	Lead and consult on large business process/technology transformation programs. Manage business unit/segment. Advise technology clients. Deliver improvements and cost savings. Recruit, develop, and manage teams. Deliver value to customers. Act as primary contact with client executives; plan and facilitate critical meetings. Support clients in defining agenda and/or corporate strategy. Develop account plans and take responsibility for the development and growth of strategic client accounts. Develop overall administrative, financial, and time commitments for multiple engagements; set overall goals and drive agendas to ensure goals are met. Manage multiple engagements and provide mentoring and guidance to project managers and team members. Perform engagement quality reviews and drive continuous improvement efforts. Act as a subject matter expert on engagements. Serve as a sounding board for engagement team's strategic direction. Provide executive leadership on sales calls and oversee multiple proposal development efforts.

4	Director	Bachelor's	12 years	Possess extensive technology/business process knowledge in area(s) of expertise (SME). Develop business/technology strategy capabilities. Drive client thinking and act as thought leader. Support client partners in defining client agenda and/or corporate strategy. Manage multiple engagements and provide mentoring and guidance to project managers and team members. Act as a subject matter expert on engagements. Perform engagement quality reviews and drive continuous improvement efforts. Plan and facilitate significant meetings with client executives. Develop overall administrative, financial, and time commitments for multiple projects and set overall goals for each. Ensure effective and creative idea generation among team members. Conduct primary research including market surveys of customers, vendors, lines of business, and users as well as secondary research. Analyze findings, develop insights, and integrate individual work streams into a single, cohesive report with client-specific actionable recommendations.
5	Director 2	Bachelor's	14 years	Possess extensive technology/business process knowledge in area(s) of expertise (SME). Develop business/technology strategy capabilities. Drive client thinking and act as thought leader. Support client partners in defining client agenda and/or corporate strategy. Manage multiple engagements and provide mentoring and guidance to project managers and team members. Act as a subject matter expert on engagements. Perform engagement quality reviews and drive continuous improvement efforts. Plan and facilitate significant meetings with client executives. Develop overall administrative, financial, and time commitments for multiple projects and set overall goals for each. Ensure effective and creative idea generation among team members. Conduct primary research including market surveys of customers, vendors, lines of business, and users as well as secondary research. Analyze findings, develop insights, and integrate individual work streams into a single, cohesive report with client-specific actionable recommendations.
6	Director 3	Bachelor's	16 years	Possess extensive technology/business process knowledge in area(s) of expertise (SME). Develop business/technology strategy capabilities. Drive client thinking and act as thought leader. Support client partners in defining client agenda and/or corporate strategy. Manage multiple engagements and provide mentoring and guidance to project managers and team members. Act as a subject matter expert on engagements. Perform engagement quality reviews and drive continuous improvement efforts. Plan and facilitate significant meetings with client executives. Develop overall administrative, financial, and time commitments for multiple projects and set overall goals for each. Ensure effective and creative idea generation among team members. Conduct primary research including market surveys of customers, vendors, lines of business, and users as well as secondary research. Analyze findings, develop insights, and integrate individual work streams into a single, cohesive report with client-specific actionable recommendations.

7	Senior Manager	Bachelor's	10 years	Lead or consult on large business process/technology projects/programs. Drive client thinking and act as thought leader. Support client partner in defining client agenda and/or corporate strategy. Plan and facilitate significant meetings with client executives. Develop overall administrative, financial, and time commitments for multiple projects and set overall goals for each. Ensure effective and creative idea generation among team members. Conduct primary research including market surveys of vendors and users as well as secondary research. Analyze findings, develop insights, and integrate individual work streams into a single, cohesive report with client-specific actionable recommendations. Prepare engagement review forms and provide coaching and mentoring for team members. Identify and pursue sales opportunities and leads, which may come from meetings, clients, other consultants, the sales force, vendors, and others. Support and assist the sales organization by making joint sales calls. Contribute to account plan development and proactively follow up on all assigned leads. Write and present proposals to prospective clients and contracts for engagements.
8	Senior Manager 2	Bachelor's	12 years	Lead or consult on large business process/technology projects/programs. Drive client thinking and act as thought leader. Support client partner in defining client agenda and/or corporate strategy. Plan and facilitate significant meetings with client executives. Develop overall administrative, financial, and time commitments for multiple projects and set overall goals for each. Ensure effective and creative idea generation among team members. Conduct primary research including market surveys of vendors and users as well as secondary research. Analyze findings, develop insights, and integrate individual work streams into a single, cohesive report with client-specific actionable recommendations. Prepare engagement review forms and provide coaching and mentoring for team members. Identify and pursue sales opportunities and leads, which may come from meetings, clients, other consultants, the sales force, vendors, and others. Support and assist the sales organization by making joint sales calls. Contribute to account plan development and proactively follow up on all assigned leads. Write and present proposals to prospective clients and contracts for engagements.
9	Senior Manager 3	Bachelor's	14 years	Lead or consult on large business process/technology projects/programs. Drive client thinking and act as thought leader. Support client partner in defining client agenda and/or corporate strategy. Plan and facilitate significant meetings with client executives. Develop overall administrative, financial, and time commitments for multiple projects and set overall goals for each. Ensure effective and creative idea generation among team members. Conduct primary research including market surveys of vendors and users as well as secondary research. Analyze findings, develop insights, and integrate individual work streams into a single, cohesive report with client-specific actionable recommendations. Prepare engagement review forms and provide coaching and mentoring for team members. Identify and pursue sales opportunities and leads, which may come from meetings, clients, other consultants, the sales force, vendors, and others. Support and assist the sales organization by making joint sales calls. Contribute to account plan development and proactively follow up on all assigned leads. Write and present proposals to prospective clients and contracts for engagements.

10	Manager	Bachelor's	8 years	Manage/support business/technology projects. Plan and facilitate meetings with client project management. Meet with client and develop project questions, gain understanding of the client's environment, and assure that recommendations can be implemented. Manage small to medium teams by developing work plans and managing project execution timelines. Prepare engagement review forms for team members. As an independent contributor, complete sections of significant customized consulting assignments covering a variety of subject areas including specific technologies and products, markets and market trends, competitor analysis, financial impact, etc. Act as project point person both internally and externally. Lead the team's analytical thinking and structure for an assignment. Conduct primary research including market surveys of vendors and users as well as secondary research. Analyze findings, develop insights, and integrate individual work streams into a single, cohesive report with client-specific actionable recommendations. Develop and submit content for proposals. Support development of work plan estimates and resource/staff plans. Recognize and report new business opportunities; collaborate with sales partners and subject matter experts to pursue and close opportunities.
11	Manager 2	Bachelor's	10 years	Manage/support business/technology projects. Plan and facilitate meetings with client project management. Meet with client and develop project questions, gain understanding of the client's environment, and assure that recommendations can be implemented. Manage small to medium teams by developing work plans and managing project execution timelines. Prepare engagement review forms for team members. As an independent contributor, complete sections of significant customized consulting assignments covering a variety of subject areas including specific technologies and products, markets and market trends, competitor analysis, financial impact, etc. Act as project point person both internally and externally. Lead the team's analytical thinking and structure for an assignment. Conduct primary research including market surveys of vendors and users as well as secondary research. Analyze findings, develop insights, and integrate individual work streams into a single, cohesive report with client-specific actionable recommendations. Develop and submit content for proposals. Support development of work plan estimates and resource/staff plans. Recognize and report new business opportunities; collaborate with sales partners and subject matter experts to pursue and close opportunities.
12	Manager 3	Bachelor's	12 years	Manage/support business/technology projects. Plan and facilitate meetings with client project management. Meet with client and develop project questions, gain understanding of the client's environment, and assure that recommendations can be implemented. Manage small to medium teams by developing work plans and managing project execution timelines. Prepare engagement review forms for team members. As an independent contributor, complete sections of significant customized consulting assignments covering a variety of subject areas including specific technologies and products, markets and market trends, competitor analysis, financial impact, etc. Act as project point person both internally and externally. Lead the team's analytical thinking and structure for an assignment. Conduct primary research including market surveys of vendors and users as well as secondary research. Analyze findings, develop insights, and integrate individual work streams into a single, cohesive report with client-specific actionable recommendations. Develop and submit content for proposals. Support development of work plan estimates and resource/staff plans. Recognize and report new business opportunities; collaborate with sales partners and subject matter experts to pursue and close opportunities.

13	Senior Consultant	Bachelor's	5 years	Support business and technology projects by gathering, compiling, and analyzing data; surveying and statistical analysis; and developing deliverable reports. Participate in client conferences and take part in client communications. Complete sections of significant customized consulting assignments covering a variety of subject areas including specific technologies and products, markets and market trends, competitor analysis, financial impact, etc. Provide the analytical thinking and structure for assignment and participate in discussion groups. Conduct and lead interviews and small meetings for assignment. Analyze findings, develop insights, and prepare reports with client-specific actionable recommendations. Monitor project execution to timeline and budget. Develop and submit content for proposals. Support development of work plan estimates and resource/staff plans. May serve as project manager for well-defined engagements.
14	Senior Consultant 2	Bachelor's	7 years	Support business and technology projects by gathering, compiling, and analyzing data; surveying and statistical analysis; and developing deliverable reports. Participate in client conferences and take part in client communications. Complete sections of significant customized consulting assignments covering a variety of subject areas including specific technologies and products, markets and market trends, competitor analysis, financial impact, etc. Provide the analytical thinking and structure for assignment and participate in discussion groups. Conduct and lead interviews and small meetings for assignment. Analyze findings, develop insights, and prepare reports with client-specific actionable recommendations. Monitor project execution to timeline and budget. Develop and submit content for proposals. Support development of work plan estimates and resource/staff plans. May serve as project manager for well-defined engagements.
15	Senior Consultant 3	Bachelor's	9 years	Support business and technology projects by gathering, compiling, and analyzing data; surveying and statistical analysis; and developing deliverable reports. Participate in client conferences and take part in client communications. Complete sections of significant customized consulting assignments covering a variety of subject areas including specific technologies and products, markets and market trends, competitor analysis, financial impact, etc. Provide the analytical thinking and structure for assignment and participate in discussion groups. Conduct and lead interviews and small meetings for assignment. Analyze findings, develop insights, and prepare reports with client-specific actionable recommendations. Monitor project execution to timeline and budget. Develop and submit content for proposals. Support development of work plan estimates and resource/staff plans. May serve as project manager for well-defined engagements.

16	Consultant	Bachelor's	2 years	Provide analytical support to project team. Conduct research using library facilities, Info-Tech analysts, other Info-Tech resources, and primary research. Analyze, interpret, extrapolate, project, and model data to reach conclusions. Prepare written reports with text, charts, and spreadsheets for internal presentation and for inclusion in reports for clients. Participate in project/initiative planning and support the completion of estimates. May participate on lead qualification to learn processes and fundamental skills needed for consulting sales process. Participate in opening client conference at which the engagement is defined (kick-off meetings) and begin to take lead role for client communications. May participate in final conference with client at which final report is delivered. As assigned, complete sections of significant customized consulting assignments covering a variety of subject areas including technologies, markets, products, competitive analysis, financial impact, etc.
17	Consultant 2	Bachelor's	4 years	Provide analytical support to project team. Conduct research using library facilities, Info-Tech analysts, other Info-Tech resources, and primary research. Analyze, interpret, extrapolate, project, and model data to reach conclusions. Prepare written reports with text, charts, and spreadsheets for internal presentation and for inclusion in reports for clients. Participate in project/initiative planning and support the completion of estimates. May participate on lead qualification to learn processes and fundamental skills needed for consulting sales process. Participate in opening client conference at which the engagement is defined (kick-off meetings) and begin to take lead role for client communications. May participate in final conference with client at which final report is delivered. As assigned, complete sections of significant customized consulting assignments covering a variety of subject areas including technologies, markets, products, competitive analysis, financial impact, etc.
18	Consultant 3	Bachelor's	6 years	Provide analytical support to project team. Conduct research using library facilities, Info-Tech analysts, other Info-Tech resources, and primary research. Analyze, interpret, extrapolate, project, and model data to reach conclusions. Prepare written reports with text, charts, and spreadsheets for internal presentation and for inclusion in reports for clients. Participate in project/initiative planning and support the completion of estimates. May participate on lead qualification to learn processes and fundamental skills needed for consulting sales process. Participate in opening client conference at which the engagement is defined (kick-off meetings) and begin to take lead role for client communications. May participate in final conference with client at which final report is delivered. As assigned, complete sections of significant customized consulting assignments covering a variety of subject areas including technologies, markets, products, competitive analysis, financial impact, etc.

Criteria for Experience/Education Substitutions Methodology

A college degree is a valuable asset and communicates the caliber of the employee. Info-Tech Research Group (ITRG) has a standard commercial practice of allowing education to be substituted for years of experience as shown in our Education Substitution Methodology (e.g. a bachelor's degree may be substituted for 4 years of required experience with a high school diploma). Through ITRG's years of experience with observing employee development, ITRG has determined that a beginner with a college degree is most likely to perform the work requirements to meet the quality assurance standards of the company.

ITRG has also found that actual on-the-job training (performing a job under the tutelage of a senior-level experienced manager) is an exceptionally valuable way to teach an employee how to perform a job that meets the high-quality

standards expected by clients. ITRG has found that a non-degreed employee after 4 years of specific experience in a position begins to perform at the same level as a degreed individual. Therefore, ITRG also has a standard commercial practice of allowing experience to be substituted for education as shown in our Experience Substitution Methodology (e.g. high school diploma + 4 years' additional experience equals bachelor's degree).

Experience Substitutions

<ul style="list-style-type: none"> High school diploma + 2 years' additional experience Trade/vocational school or technical training or military training in relevant field 	Equals	Associate degree
<ul style="list-style-type: none"> Associate degree + 2 years' additional experience High school diploma + 4 years' additional experience High school diploma + professional or industry-standard technical certification in a relevant field (e.g. Digital Video Engineering Professional, Microsoft Certified Solutions Expert, Certified Information Professional, Adobe Certified Associate, Certified Meeting Professional) 	Equals	Bachelor's degree
<ul style="list-style-type: none"> Bachelor's degree + 2 years' additional experience High school diploma + professional license (e.g. Project Management Professional [PMP], Strategic Communication Management Professional) 	Equals	Master's degree
<ul style="list-style-type: none"> Master's degree + 3 years' additional experience 	Equals	PhD

Experience Substitutions

A PhD may be substituted for 3 years of required experience with a master's degree or 5 years of required experience with a bachelor's degree.

A master's degree may be substituted for 2 years of required experience with a bachelor's degree.

A bachelor's degree may be substituted for 4 years of required experience with a high school diploma.

An associate degree may be substituted for 2 years of required experience with a high school diploma.

A professional certification in a relevant field may be substituted for 4 years of required experience with a high school diploma.

GSA Offering – Consulting (GSA Rates)

SIN	Labor Category	GSA Price (including IFF)
54151S	Vice President	\$363.92
54151S	Vice President 2	\$370.50
54151S	Vice President 3	\$385.54
54151S	Director	\$311.72
54151S	Director 2	\$316.43
54151S	Director 3	\$330.61
54151S	Senior Manager	\$259.22
54151S	Senior Manager 2	\$285.78
54151S	Senior Manager 3	\$296.78
54151S	Manager	\$208.68
54151S	Manager 2	\$225.69
54151S	Manager 3	\$245.40
54151S	Senior Consultant	\$177.08
54151S	Senior Consultant 2	\$185.69
54151S	Senior Consultant 3	\$195.26
54151S	Consultant	\$156.81
54151S	Consultant 2	\$162.47
54151S	Consultant 3	\$170.03

GSA Offering – Software Licenses (SIN 511210)



F23 Pricing

MFR Part No.	Product Name	Product Description	Unit of Issue	Price Offered to GSA (Including IFF)
MYP23-001	myPolicies - Small	myPolicies software license use for small business (1-50 Users)	EA	\$6,819.90
MYP23-002	myPolicies - Medium	myPolicies software license use for medium business (51-200 Users)	EA	\$13,256.93
MYP23-003	myPolicies - Large	myPolicies software license use for large business (201-400 Users)	EA	\$19,000.00

Service Level Details

Accessing Info-Tech Services

Our Services include an easy-to-administrate access model that will allow maximum access by IT team members. Each Research Member is assigned a username and password and receives a new user tour upon registration.

Our services are provided via the web and are supported on the following web browsers:

- Chrome 55+
- Edge 12+
- Firefox 52+
- Safari 10+
- IE 11+

It is possible that our web-based services will run without issue on older software; however, we do not currently actively test using browser versions older than those listed above.

All online downloads are available in either MS Office or PDF formats and may also be available in compressed ZIP archives of the same formats.

We have clients in a wide variety of locations and time zones, and we accommodate them based on the times that are common to our respective time zones.

Analysts are available at their earliest opportunity, but due to the amount of preparation involved, a minimum of 24 hours lead time is required. Generally, if there are no travel complications, analysts are available within 2-3 business days of the request.

Dedicated Account Management

Info-Tech will provide members (license/seat holders) with an Account Manager who will be the main point of contact for all IT research & advisory service requirements.

These requirements include (but are not limited to):

- Onboarding all new members via teleconference.
- Creation and delivery of a Key Initiative Plan to align Info-Tech resources to the user's specific requirements and needs based on role and upcoming technology projects.

- Handle all basic service requests (adding/deleting members, sending documents, answering all membership questions, sending usage reports, renewal duties, etc.).
- Book advisory services for members such as analyst calls, Guided Implementation calls, Workshop requests, contract review calls, data-driven diagnostic benchmarking programs, etc.
- Scheduled touchpoint to ensure maximum usage by the members.

Info-Tech's Account Manager will be one dedicated person supported by a team. Users will also have access to Info-Tech's entire bench of research analysts and subject matter experts to guide them through technology projects via their advisory services access. It is important to note that while the Account Manager will be one dedicated person, members will have access to hundreds of IT experts through their account manager and membership subscription services.

All these management services are included within the overall services offered to Info-Tech members. Please note it is Info-Tech's mission to ensure our services are used, not just read. We will work with your team tirelessly to ensure all named members get the absolute most out of their membership and drive year-over-year services to provide ongoing and dedicated support to project success and sustainability.

Info-Tech has self-serve options in terms of booking calls, diagnostic programs, requesting research, etc. on our site that the members will all have access to. However, the dedicated Counselors and account management team will have developed project and technology plans to drive the membership services unique to the specific needs of the various members and shape the research and project assistance over a 12-month span. Info-Tech's dedicated account manager will also work with non-named users via the named users for training program access and shared research and advisory service inclusion access.

Info-Tech GSA Approved Terms of Use

Exhibit A

This document states the terms and conditions under which you may use this website and the Services, which are the property of Info-Tech Research Group Inc., ("Info-Tech"). Executing this Agreement or the accompanying purchase order in writing constitutes acceptance of these terms and conditions.

1. General Use Restrictions

Info-Tech services, advice, materials, products, websites and network (collectively the "Services") are to be used for the User's (meaning a named individual user that uses the publicly available Services, or is authorized by Info-Tech in a service agreement to use the Services that require paid access) use and benefit only pursuant to the terms and limitations of the paid subscription and may not be disclosed, disseminated or distributed to any other party, except as Info-Tech otherwise agrees in writing. The User will not circumvent any encryption or otherwise gain access to Services for which the User has not been expressly granted the appropriate rights of access.

The User will not use the Services for or knowingly transmit to Info-Tech or upload to any Info-Tech site or network any illegal, improper or unacceptable material or use them for illegal, improper or unacceptable practices including without limitation the dissemination of any defamatory, fraudulent, infringing, abusive, lewd, obscene or pornographic material, viruses, Trojan horses, time bombs, worms, or other harmful code designed to interrupt, destroy, or limit the function of any software, hardware or communications equipment, unsolicited mass email or other internet-based advertising campaigns, privacy breaches, denial of use attacks, spoofing, or impersonation.

2. Copyright

The Services are © Info-Tech Research Group Inc. All rights reserved.

The Services are owned by and copyrighted by Info-Tech and other parties and may contain trademarks of Info-Tech or others. They are protected by Canadian, U.S. and international copyright and trademark laws and conventions.

User may use the Services solely for their own information purposes pursuant to the terms and limitations of the paid subscription. The User may download any of the Service's tools or templates for their individual use, but may not distribute any articles, tools, templates or blueprints internally, subject to the exceptions below.

Info-Tech is proud of and believes in the value of the Services it provides to Users. Info-Tech also appreciates referrals that Users generate by forwarding articles, tools and templates downloaded from the Services to non-Users. Info-Tech encourages Users to forward copies of individual articles, tools, templates and blueprints contained in the Services to colleagues and others who may be interested Info-Tech's Services in order for the recipient to evaluate Info-Tech's Services ("Evaluation Copy"), provided all copyright, trademark and other notices are not altered or removed. For greater

certainly, Users may forward Evaluation Copies of articles, tools, templates and blueprints contained in the Services to other non-User individuals both internal and external to the User's organization strictly for the purpose of the recipient's evaluation of Info-Tech's Services and not for any other purpose or use.

User acknowledges and agrees that they will forward Evaluation Copies to non-Users for the sole purpose of the recipient non-User's evaluation of Info-Tech's Services. Info-Tech reserves the right to review, at its sole discretion, User's account for forwarding activity, including but not limited to reviewing the quantity and description of any Evaluation Copies forwarded as well as the identification and contact information of the recipients of all Evaluation Copies. The User acknowledges that Info-Tech views Evaluation Copies as a referral system and understands that Info-Tech may attempt to contact the recipient non-User in order to assess their satisfaction with the Evaluation Copy and interest in Info-Tech's Services. User also acknowledges and agrees that Info-Tech reserves the right, at Info-Tech's sole discretion, to limit or disable User's ability to forward Evaluation Copies of articles, tools, templates and blueprints upon review of User's forwarding activities.

Any other reproduction or dissemination of the Services in any form or by any means is forbidden without Info-Tech's written permission, and without limiting the generality of the foregoing, the User will not:

- a. record and re-transmit the Service over any network (including any local area network), except as otherwise stated above;
- b. use any Service in any timesharing, service bureau, bulletin board or similar arrangement or public display;
- c. post any Service to any other online service (including bulletin boards or the Internet);
- d. sublicense, lease, sell, offer for sale or assign the Service; or
- e. use Info-Tech's name or any excerpts from the Services in the promotion of its products or services.

3. Users

Users must be authorized to use the Services by Info-Tech. Users must maintain and protect the confidentiality of

any password(s) and are responsible to ensure that the passwords are effective. Users shall advise Info-Tech immediately if they discover that their password has been compromised, at the following number 1-888-670-8889 (US) or 1-844-618-3192 (CAN).

4. User Submissions

Info-Tech's research services include the ability for clients to contribute content for publication on Info Tech's websites. If your account is used to submit, post, or add content to Info-Tech's websites, (collectively "User Submissions"), you agree to accept sole responsibility for those User Submissions, including the information, statements, facts, and material contained in any form or medium (e.g., text, audio, video, and photographic) therein.

By using Info-Tech's research services, you agree that none of your User Submissions will:

- infringe on the intellectual property, trade secret, privacy, publicity, or other rights of others;
- contain false statements or misrepresentations that could damage Info-Tech or any third party;
- include obscene, libelous, defamatory, threatening, harassing, abusive, hateful, sexually explicit, sexually oriented, profane, or embarrassing material, as determined by Info-Tech in its sole discretion;
- be illegal or otherwise objectionable;
- contain the personal information of any third party, including, without limitation, addresses, phone numbers, email addresses, Social Security numbers, and credit card numbers;
- encourage or facilitate insider trading or anticompetitive behavior;
- include commercial advertisements or solicitations; or
- purport to or actually provide legal or professional advice.

Because Info-Tech's websites are available to the public, we cannot guarantee that User Submissions on Info-Tech's websites will remain confidential.

Although you are solely responsible for the content you provide and we do not have a policy of reviewing or monitoring all User Submissions, we reserve the right to pre-screen and/or monitor User Submissions.

If you believe that any User Submissions appear to violate these Terms of Service, or if you believe any other user is engaged in illegal, harassing, or objectionable behavior, please contact us.

You acknowledge, consent and agree that Info-Tech may access, preserve and disclose your account information and content if required to do so by law or in a good faith belief that such access, preservation, or disclosure is reasonably necessary to (i) comply with legal process; (ii) enforce these Terms; (iii) respond to claims that any content violates the rights of third parties; (iv) respond to your requests for customer service; or (v) protect the rights, property, or personal safety of Info-Tech, its users and the public.

5. Non-Disclosure of Confidential Information

In consideration of, and reliance upon, the covenants of Company and Info-Tech herein contained, the parties have or will disclose to each other certain information (hereinafter referred to as "Confidential Information"), including, without limitation, information concerning future or proposed products, financial performance and projections, customers, employees, contracts, strategic relationships, marketing plans and business plans and other information disclosed by a party (the "Disclosing Party") to the other party (the "Receiving Party"). Information which is disclosed orally shall not be considered Confidential Information unless (i) it is identified as Confidential Information prior to such disclosure, and (ii) it is memorialized in writing within fifteen (15) days following such disclosure by the Disclosing Party. Information which is disclosed visually or in tangible form (whether by document, electronic media or other form) shall not be considered Confidential Information unless it is clearly marked as Confidential Information, whether disclosed orally, visually or in tangible form (whether by document, electronic media or other form). Information shall not be considered Confidential Information if such information is actually non-confidential:

- It was in the public domain at the time of communication to the Receiving Party or is later placed in the public domain by the Disclosing Party;
- It entered the public domain through no fault of the Receiving Party subsequent to the time of disclosure hereunder to the Receiving Party;

- It was in the Receiving Party's possession free of any obligation of confidence prior to disclosure hereunder; or
- It was developed by employees or agents of the Receiving Party independently of and without reference to any Confidential Information.

Except as provided herein, Confidential Information shall include, without limitation, proprietary, technical, marketing, operating, performance, cost, business pricing policies, programs, inventions, discoveries, trade secrets, techniques, processes, source code, unlinked object modules, computer programming techniques, and all record bearing media containing or disclosing such information and techniques disclosed pursuant to this Agreement. Information regarding current products shall be treated as non-Confidential Information unless marked "Confidential".

The Receiving Party shall not disclose, publish or communicate the Confidential Information to any third party without the prior written consent of the Disclosing Party. However, the Receiving Party may disclose the Confidential Information to a third party who has a need to know the Confidential Information and (i) is an accountant, attorney, underwriter or advisor under a duty of confidentiality; or (ii) is under a written obligation of confidentiality at least as restrictive as this Agreement.

Info-Tech recognizes that Federal agencies are subject to the Freedom of Information Act, 5 U.S.C. 552, which requires that certain information be released, despite being characterized as "confidential" by the vendor.

6. Term

Many of the Services are "subscription" services that have a fixed term. When the End User is an instrumentality of the U.S., recourse against the United States for any alleged breach of this Agreement must be made as a dispute under the contract Disputes Clause (Contract Disputes Act). During any dispute under the Disputes Clause, Info-Tech shall proceed diligently with performance of this Agreement, pending final resolution of any request for relief, claim, appeal, or action arising under the Agreement, and comply with any decision of the Contracting Officer.

7. [Reserved]**8. [Reserved]****9. Accuracy of Information and Warranty**

The information contained in the Services has been obtained from sources believed to be reliable but Info-Tech does not warrant the completeness, timeliness or accuracy of any information contained in the Services. The Services are intended to: help identify business risks; provide insights based on industry research; and to help you focus on certain matters which may be affecting your business. Info-Tech does not provide legal, accounting or other professional advice, nor should any advice from Info-Tech be construed as such. We encourage you to seek professional advice whenever necessary.

Info-Tech expressly excludes and disclaims all express or implied conditions, representations and warranties including, without limitation, any implied warranties or conditions of merchantability or fitness for a particular purpose, to the extent allowable by law.

Although Info-Tech takes reasonable steps to screen Services for infection by viruses, worms, Trojan horses or other code manifesting contaminating or destructive properties before making the Services available, Info-Tech cannot guarantee that any Service will be free of infection.

User assumes sole responsibility for the selection of the Services to achieve its intended results. The opinions expressed in the Services are subject to change without notice.

Info-Tech does not endorse third-party products or services. Info-Tech assesses and analyzes the effectiveness and appropriateness of information technology in the context of a general business environment only unless specifically hired by a User to assess in the context of their own environment.

This agreement does not limit or disclaim any of the warranties specified in the GSA schedule 70 contract under far 52.212-4(O). In the event of a breach of warranty, the U.S. Government reserves all rights and remedies under the contract, the federal

acquisition regulations, and the contract disputes act, 41 U.S.C. 7101-7109.

10. Limitation of Liability

In no event is Info-Tech liable for any direct, special, indirect, consequential, incidental, punitive or other damages however caused, whether in contract, tort, negligence, strict liability, operation of law or otherwise, (including without limitation damages for lost profits, business interruption or loss arising out of the use of or inability to use the Services, or any information provided in the Services, or claims attributable to errors, omissions or other inaccuracies in the Service or interpretations thereof), even if Info-Tech has been advised of the possibility of such damages. Info-Tech's total liability shall in no event exceed the amount paid by the User for the Service in question.

The User acknowledges that Info-Tech has set its prices and sold the Services in reliance on the limitations of liability and disclaimers of warranties and damages set forth herein and that the same form a fundamental and essential basis of the bargain between the parties. They shall apply even if the contract between the User and Info-Tech is found to have failed in its fundamental or essential purpose or has been fundamentally breached.

This agreement shall not impair the U.S. Government's right to recover for fraud or crimes arising out of or related to this contract under any federal fraud statute, including the false claims act, 31 U.S.C. 3729-3733. Furthermore, this clause shall not impair nor prejudice the U.S. Government's right to express remedies provided in the GSA schedule contract (e.g., Clause 552.238-75 – Price reductions, clause 52.212-4(H) – patent indemnification, and GSAr 552.215-72 – Price adjustment – failure to provide accurate information).

11. Links to Third-Party Sites

Any third-party sites that are linked to the Services are not under Info-Tech's control. Info-Tech is not responsible for anything on the linked sites, including without limitation any content, links to other sites, any changes to those sites, or any policies those sites may have. Info-Tech provides links as a convenience only and such links do not imply any endorsement by Info-Tech of those sites.

12. Investment Advice

The Services are not intended to be used for the purpose of, or as a basis for, making investment decisions or recommendations with respect to securities of any company or industry and Info-Tech assumes no liability for decisions made, in whole or in part, on the basis of any information contained in the Services.

13. Governing Law

This site and agreement is governed by the Federal laws of the United States, excluding any conflicts of law provisions and excluding the United Nations Convention on Contracts for the International Sale of Goods.

14. Privacy

A User's right to privacy is of paramount importance to Info-Tech. See our Privacy Policy below for more detail. The identity of our research clients is not considered personal or confidential information, and we may disclose that information for promotion and marketing purposes.

15. Contact Information**CORPORATE COUNSEL**

Toll-free (US): 1-888-670-8889

Toll-free (CAN): 1-844-618-3192

International: +1-519-432-3550

Info-Tech GSA Approved Privacy Policy

This is the privacy policy of Info-Tech Research Group Inc. ("Info-Tech"). This document explains Info-Tech's policies for the collection, use and disclosure of personal information.

The information we collect

Info-Tech collects information by various methods including information actively provided by its lead providers and its customers and information arising from customer surveys and general feedback.

The types of personal information we collect include name, contact information, identification information, and credit information. Credit card information is used for billing purposes only. We may record calls to or from our customer service representatives for purposes of accuracy, performance reviews, training and general quality assurance.

How we use this information

This information is used to provide our various products including customer service, accounting, billing, collections, and the marketing of other Info-Tech products.

Info-Tech may use aggregate or anonymous information, which will not be linked to identified individuals, for various other uses for itself and third parties. The identity of our corporate clients is not considered personal or confidential information, and we may disclose that information for promotion and marketing purposes.

Info-Tech users may have the option to participate in online discussion communities. Such communities are exclusive communities for certain Info-Tech subscribers and are accessible only by subscribers through their Info-Tech login name and password. Participation in the community is completely voluntary. By opting into the community, subscribers agree to share basic contact information (Name, Company, Address) with their peers in the community.

Who we share this information with

Info-Tech does not share personal information with any third parties except as disclosed in this policy. Info-Tech may provide personal information to Info-Tech's consultants, subcontractors and professional advisors (which shall be bound by privacy obligations) to assist Info-Tech's uses disclosed herein.

Security

Personal information is stored in a combination of paper and electronic files. They are protected by security measures appropriate to the nature of the information.

Accessing information

Individuals may review their personal information contained in Info-Tech files by contacting the Info-Tech privacy officer. If an individual believes that any of their personal information is inaccurate, we will make appropriate corrections.

Cookies

Cookies are used by Info-Tech for the convenience of our users. They are used to streamline access to the online subscriber service. Cookies automatically authenticate the user. A user can access Info-Tech products with the cookie feature turned off; however, in doing so they may find themselves challenged for username and password information on multiple occasions. Info-Tech also uses cookies to track user's visits and uses that information to improve the user's experience and track use of our products.

Links

Info-Tech seeks out the best web sources and resources for our advisory services. Many of our pages contain links to information at other websites. When you click on one of these links, you are moving to another website. We encourage you to read the privacy statements of these linked sites as their privacy policy may differ from ours.

General

Notwithstanding the general terms of this policy, the collection, use, and disclosure of personal information may be made outside of the terms herein to the extent provided for in any applicable privacy or other legislation in effect from time to time.

Info-Tech may disclose personal information to another entity purchasing (including for diligence purposes prior to purchase) the assets of Info-Tech, provided that entity abides by this or a similar privacy policy.

Opt-out

If at any time you would like to discontinue email communication from Info-Tech Research Group, please notify us via the Contact Us page.

Contact us

For more information on Info-Tech and privacy please contact our Privacy Officer at:

CORPORATE COUNSEL

Toll-free (US): 1-888-670-8889

Toll-free (CAN): 1-844-618-3192

International: +1-519-432-3550

myPolicies GSA Approved Terms of Use

This document states the terms and conditions under which you may use this website and the Services, which are the property of myPolicies, a division of Info-Tech Research Group Inc., a corporation incorporated pursuant to the laws of Canada ("myPolicies").

Executing this Agreement or accompanying purchase order constitutes acceptance of these terms and conditions. Registered users will be provided with a username and password to access and use the secure portal within the myPolicies website (the "Secure Portal"). If User wishes to use single sign-on (SSO), myPolicies would be pleased to work with a SSO provider of User's choice. If you are accessing this site or any mobile application thereof, these Terms of Use ("Terms") govern your access and use of the myPolicies website, its successor domains and any mobile application of the myPolicies website (collectively the "Site").

Please take the time to read these Terms carefully. The Terms describe how you may use this Site and what you must refrain from doing while using this Site. The Terms also describe how information you contribute will be shared, who owns information on the Site and other important matters relating to your use of the Site. Executing this Agreement or accompanying purchase order constitutes acceptance of these terms and conditions and you acknowledge that you have read and understood these Terms and that you agree to be legally bound by the Terms. We ask that you review the Terms regularly, as we reserve the right to make changes to the non-material terms and conditions of the Terms without giving you prior notice. For your reference, we will post when the non-material terms and conditions of the Terms were last updated. Accessing and/or using the Site after modification of the Terms shall constitute acceptance of the Terms. Any material updates to these Terms shall be presented to Ordering Activity for review and will not be effective unless and until both parties sign a written agreement updating these terms.

In these Terms, "us", "we", "our" and myPolicies refers to myPolicies, a division of Info-Tech Research Group Inc., a corporation incorporated pursuant to the laws of Canada. When "you" or "your" is stated in these Terms, it refers to the Ordering Activity under GSA Schedule contracts identified in the Purchase Order, Statement of Work, or similar document using the Site and to any person contributing content in any manner to the Site. If you are accessing the Site on behalf of an organization, including a business, "you" refers to the organization you are working on behalf of and the organization agrees to be bound by these Terms to the fullest extent allowable by applicable law. When you are agreeing to these Terms on behalf of an organization, your agreement to these Terms also signifies to us your authority to bind the organization for the purposes of these Terms. "User" or "Users" refer to individuals who are authorized to access and/or contribute information to the Site, whether or not they are doing so on behalf of an organization. You further agree to nominate one individual as a contact for myPolicies. Communications regarding the Services will be between that contact and a contact provided by myPolicies.

1. General Use Restrictions

myPolicies services, advice, materials, products, websites and network (collectively the "Services") are to be used for the User's (meaning a named individual user that uses the publicly available Services or is authorized by myPolicies in a service agreement to use the Services that require paid access) use and benefit only pursuant to the terms and limitations of the paid subscription and may not be disclosed, disseminated or distributed to any other party, except as myPolicies otherwise agrees in writing. The User will not circumvent any encryption or otherwise gain access to Services for which the User has not been expressly granted rights of access.

The User will not use the Services for or knowingly transmit to myPolicies or upload to any myPolicies site or network any illegal, improper or unacceptable material or use them for illegal, improper or unacceptable practices including without limitation the dissemination of any defamatory, fraudulent, infringing, abusive, lewd, obscene or pornographic material, viruses, Trojan horses, time bombs, worms, or other harmful code designed to interrupt, destroy, or limit the function of any software, hardware or communications equipment, unsolicited mass email or other internet-based advertising campaigns, privacy breaches, denial-of-service of use attacks, spoofing, or impersonation.

The User SHALL NOT use the Services to anonymously report any type of harassment or abuse. Any anonymous complaints of harassment or abuse shall not be made via the Services, and User agrees to report any harassment or abuse to their supervisor or their Human Resources department, or the police, as required. Any anonymous reports of harassment or abuse made via the Services will not be acknowledged or acted upon.

2. Intellectual Property Rights including Copyright

The Services are © Info-Tech Research Group Inc. All rights reserved.

The Services are owned by and copyrighted by myPolicies, a division of Info-Tech and other parties and may contain trademarks of Info-Tech or others. They are protected by Canadian, U.S. and international copyright and trademark laws and conventions.

User may use the Services solely for their own information purposes pursuant to the terms and limitations of the paid subscription. The User may download any of the Service's tools or templates for their individual use, but may not distribute any articles, tools, templates or blueprints internally, subject to the exceptions below. The User may create derivative works from the Service's tools or templates and distribute these for internal use but may not distribute these derivative works externally for any commercial or resale purposes.

We retain all right, title, interest, in and to any policy templates, report templates or any blueprints, documents, PowerPoint slides or outlines that may be provided as part of the Services ("myPolicies IP"). You obtain a royalty-free, transferable, fully paid-up license to use and incorporate myPolicies' IP into the policies and reports you create using the Services.

"Work Product" in these Terms is defined as the customized policies or reports or other tangible results that you create through the use of the Services. You will own the Work Product as a whole, provided you do not resell it or allow it to be resold. You do not obtain any intellectual property interest in myPolicies' IP, other than the limited license set out above. We reserve the right to review the Work Product and to use any portion of the Work Product to improve the Services. We warrant that your identity and confidential information will be held in strict confidence and will never form part of the Services.

When you upload any documents or policies to the Site ("Your IP"), you represent that you have all necessary rights and interests in and to such policies or reports necessary to share the same with us, and you grant us and our affiliates the right to review Your IP and to use any portion of Your IP to improve the Services, provided we do not share your identity or confidential information with any third parties.

Any other reproduction or dissemination of the Services in any form or by any means is forbidden without myPolicies' written permission, and without limiting the generality of the foregoing, the User will not:

- a. record and re-transmit the Service over any network (including any local area network), except as otherwise stated above;
- b. use any Service in any timesharing, service bureau, bulletin board or similar arrangement or public display;
- c. post any Service to any other online service (including bulletin boards or the Internet);
- d. sublicense, lease, sell, offer for sale or assign the Service; or
- e. use myPolicies name or any excerpts from the Services in the promotion of its products or services.

3. Users

Users must be authorized to use the Services by myPolicies. Users must maintain and protect the confidentiality of any password(s), and are responsible to ensure that the passwords are effective. Users shall advise Info-Tech immediately if they discover that their password has been compromised, at the following number: 1-888-670-8889 (US) or 1-844-618-3192 (CAN).

4. Non-Disclosure of Confidential Information

In consideration of, and reliance upon, the covenants of the User and myPolicies herein contained, the parties have or will disclose to each other certain information (hereinafter referred to as "Confidential Information"), including, without limitation, information concerning future or proposed products, financial performance and projections, customers, employees, contracts, strategic relationships, marketing plans and business plans and other information disclosed by a party (the "Disclosing Party") to the other party (the "Receiving Party"). Information which is disclosed orally shall not be considered Confidential Information unless (i) it is identified as Confidential Information prior to such disclosure, and (ii) it is memorialized in writing within fifteen (15) days following such disclosure by the Disclosing Party. Information which is disclosed visually or in tangible form (whether by document, electronic media or other form) shall not be considered Confidential Information unless it is clearly marked as Confidential Information, whether disclosed orally, visually or in tangible form (whether by document, electronic media or other form). Information shall not be considered Confidential Information if:

- It was in the public domain at the time of communication to the Receiving Party or is later placed in the public domain by the Disclosing Party;
- It entered the public domain through no fault of the Receiving Party subsequent to the time of disclosure hereunder to the Receiving Party;
- It was in the Receiving Party's possession free of any obligation of confidence prior to disclosure hereunder; or
- It was developed by employees or agents of the Receiving Party independently of and without reference to any Confidential Information.

Except as provided herein, Confidential Information shall include, without limitation, proprietary, technical, marketing,

operating, performance, cost, business pricing policies, programs, inventions, discoveries, trade secrets, techniques, processes, source code, unlinked object modules, computer programming techniques, and all record bearing media containing or disclosing such information and techniques disclosed pursuant to this Agreement. Information regarding current products shall be treated as non-Confidential Information unless marked "Confidential".

The Receiving Party shall not disclose, publish or communicate the Confidential Information to any third party without the prior written consent of the Disclosing Party. However, the Receiving Party may disclose the Confidential Information to a third party who has a need to know the Confidential Information and (i) is an accountant, attorney, underwriter or advisor under a duty of confidentiality; or (ii) is under a written obligation of confidentiality at least as restrictive as this Agreement.

You acknowledge, consent and agree that myPolicies may access, preserve and disclose your account information and content if required to do so by law or in a good faith belief that such access, preservation, or disclosure is reasonably necessary to (i) comply with legal process; (ii) enforce these Terms; (iii) respond to claims that any content violates the rights of third parties; (iv) respond to your requests for customer service; or (v) protect the rights, property, or personal safety of myPolicies, its users and the public.

Info-Tech recognizes that Federal agencies are subject to the Freedom of Information Act, 5 U.S.C. 552, which requires that certain information be released, despite being characterized as "confidential" by the vendor.

5. Term

Many of the Services are "subscription" services that have a fixed term. When the End User is an instrumentality of the U.S., recourse against the United States for any alleged breach of this Agreement must be made as a dispute under the contract Disputes Clause (Contract Disputes Act). During any dispute under the Disputes Clause, Info-Tech shall proceed diligently with performance of this Agreement, pending final resolution of any request for relief, claim, appeal, or action arising under the Agreement, and comply with any decision of the Contracting Officer.

6. Reserved**7. Reserved****8. Accuracy of Information and Warranty**

The information contained in the Services has been obtained from sources believed to be reliable but myPolicies does not warrant the completeness, timeliness or accuracy of any information contained in the Services. myPolicies is an online policy management solution that streamlines the creation, approval, distribution, and monitoring of corporate policies, procedures, and forms developed in the context of a general business environment. Policies are to be modified by Users in the context of their own environment. The Site does not provide legal, accounting or other professional advice, nor should any advice from myPolicies be construed as such. We encourage you to seek professional advice whenever necessary, including, but not limited to, ensuring regulatory compliance for you or your organization. We do not warrant or otherwise guarantee that your use of the Services will ensure regulatory compliance in your jurisdiction or industry.

myPolicies warrants that the Services will, for a period of sixty (60) days from the date of your receipt, perform substantially in accordance with Services written materials accompanying it. EXCEPT AS EXPRESSLY SET FORTH IN THE FOREGOING, myPolicies expressly excludes and disclaims all express or implied conditions, representations and warranties including, without limitation, any implied warranties or conditions of merchantability or fitness for a particular purpose, to the extent allowable by law.

Although myPolicies takes reasonable steps to screen Services for infection by viruses, worms, Trojan horses or other code manifesting contaminating or destructive properties before making the Services available, myPolicies cannot guarantee that any Service will be free of infection.

User assumes sole responsibility for the selection of the Services to achieve its intended results. The opinions expressed in the Services are subject to change without notice.

myPolicies does not endorse third-party products or services.

This agreement does not limit or disclaim any of the warranties specified in the GSA schedule 70 contract under far 52.212-4(O). In the event of a breach of warranty, the U.S. Government reserves all rights and remedies under the contract, the federal acquisition regulations, and the contract disputes act, 41 U.S.C. 7101-7109

9. Limitation of Liability

In no event is myPolicies liable for any special, indirect, consequential, incidental, punitive or other damages however caused, whether in contract, tort, strict liability, operation of law or otherwise, (including without limitation damages for lost profits, business interruption or loss arising out of the use of or inability to use the Services, or any information provided in the Services, or claims attributable to errors, omissions or other inaccuracies in the Service or interpretations thereof), even if myPolicies has been advised of the possibility of such damages. myPolicies' total liability shall in no event exceed the amount paid by the User for the Service in question. The foregoing limitation of liability shall not apply to (1) personal injury or death resulting from Licensor's negligence; (2) for fraud; or (3) for any other matter for which liability cannot be excluded by law.

The User acknowledges that myPolicies has set its prices and sold the Services to it in reliance on the limitations of liability and disclaimers of warranties and damages set forth herein and that the same form a fundamental and essential basis of the bargain between the parties. They shall apply even if the contract between the User and myPolicies is found to have failed in its fundamental or essential purpose or has been fundamentally breached.

This agreement shall not impair the U.S. Government's right to recover for fraud or crimes arising out of or related to this contract under any federal fraud statute, including the false claims act, 31 U.S.C. 3729-3733. Furthermore, this clause shall not impair nor prejudice the U.S. Government's right to express remedies provided in the GSA schedule contract (e.g., clause 552.238-75 – Price reductions, clause 52.212-4(H) – patent indemnification, and GSAr 552.215-72 – Price adjustment – failure to provide accurate information).

10. Links to Third-Party Sites

Any third-party sites that are linked to the Services are not under myPolicies' control. myPolicies is not responsible for anything on the linked sites, including without limitation any content, links to other sites, any changes to those sites, or any policies those sites may have. myPolicies provides links as a convenience only and such links do not imply any endorsement by myPolicies of those sites.

11. Investment Advice

The Services are not intended to be used for the purpose of, or as a basis for, making investment decisions or recommendations with respect to securities of any company or industry and myPolicies assumes no liability for decisions made, in whole or in part, on the basis of any information contained in the Services.

12. Governing Law

This site and agreement is governed by the Federal laws of the United States, excluding any conflicts of law provisions and excluding the United Nations Convention on Contracts for the International Sale of Goods.

13. Privacy

A User's right to privacy is of paramount importance to myPolicies. See our Privacy Policy attached hereto for more detail. The identity of our research clients is not considered personal or confidential information, and we may disclose that information for promotion and marketing purposes.

14. Contact Information**MYPOLICIES SUPPORT**

Toll-free (US): 1-888-670-8889

Toll-free (CAN): 1-844-618-3192

International: +1-519-432-3550

McLean & Company GSA Offering – Service Levels (SIN 54151S)

Each MLE account (>500 employees) requires a minimum of 2 Advisory/Leadership/Counselor-level seats.

F23 Pricing

SIN	MFR Part No.	Product Group	Product Name	Product Description	Unit of Issue	Discount Price Offered to GSA (including IFF)
54151S	M23-008	McLean's Executive & Leadership Service Levels	McLean Executive Counselor Membership	<p>A high-touchpoint, customized experience to help CHROs develop themselves and their teams while increasing personal and functional strategic impact. Receive 1:1 support from a highly experienced HR leader who has faced similar challenges. Includes all features of the Leadership Membership PLUS:</p> <ul style="list-style-type: none"> • 2 remote or onsite full-day analyst visits • Prescheduled and ad hoc calls to move your agenda forward • Guidance to understand and prepare for boardroom-level challenges • Fully personalized Leadership Development Accelerator Program • Price Benchmarking & Negotiation (for select HR technology vendors) • 90 Day "Follow-Me" Service • Exclusive access to our annual HR Executive Peer Forum • Additional event ticket: 1 Signature event ticket or 1 training program ticket (transferable) <p>Each MLE account (>500 employees) requires a minimum of 2 Advisory/Leadership/Counselor-level seats.</p>	Per Year	\$50,251.89

F23 Pricing

54151S	M23-006	McLean's Executive & Leadership Service Levels	McLean Leadership Membership	<p>Employ hands-on support to transform the HR department while developing your capacity as a strategic leader through personalized counseling and valuable peer networking opportunities.</p> <p>Includes all features of the Advisory Membership PLUS:</p> <ul style="list-style-type: none"> • Dedicated Executive Advisor • Quarterly Leadership Peer-to-Peer Roundtable (virtual) • Contract review for HR technology • One 360° Personal Evaluation and Results Session • Your choice of 1 Signature event ticket or 1 training program ticket (transferable) • Full web content access <p>Each MLE account (>500 employees) requires a minimum of 2 Advisory/Leadership/Counselor-level seats.</p>	Per Year	\$22,302.27
54151S	M23-005	McLean's Executive & Leadership Service Levels	McLean Advisory Membership	<p>Leverage unlimited access to our team of advisors, diagnostic suite*, and library of best-practice tools, templates, training materials, and step-by-step methodologies that are proven to accelerate projects and transform HR departments.</p> <p>The Advisory Membership includes:</p> <ul style="list-style-type: none"> • Dedicated Account Manager • Unlimited advisory assistance • Access to diagnostics* • Full web content access • Online eLearning Academy access <p>* Up to 500 employees are included as part of the employee lifecycle diagnostics for a single Advisory/Leadership/Counselor seat purchase. Each MLE account (>500 employees) requires a minimum of 2 Advisory/Leadership/Counselor-level seats and each additional seat beyond the first two will cover an additional 2,000 employees per seat.</p>	Per Year	\$16,176.32
54151S	M23-003	McLean's Executive & Leadership Service Levels	McLean Team Seat (add-on to an Advisory/Leadership/Counselor-level membership only)	<p>Full access to McLean's online content and Academy courses. Can only be purchased as an add-on to an Advisory/Leadership/Counselor-level membership.</p>	Per Year	\$2,392.95

F23 Pricing

54151S	WSHOP M23-007	Membership Add Ons	McLean Onsite Workshop Membership (per work- shop with membership)	<p>Add an Onsite Workshop to a McLean membership to obtain our lowest Workshop prices.</p> <p>Onsite Workshops offer an easy way to accelerate your project. We take you through every phase of your project and ensure that you have a roadmap in place to complete your project successfully. Over the course of one week, our expert facilitators help you complete a key initiative, work through critical project deliverables, and train your team.</p>	Per Year	\$26,896.73
54151S	WSHOP M23-008	Membership Add Ons	McLean Onsite Workshop (Standalone)	<p>Onsite Workshops offer an easy way to accelerate your project. We take you through every phase of your project and ensure that you have a roadmap in place to complete your project successfully. Over the course of one week, our expert facilitators help you complete a key initiative, work through critical project deliverables, and train your team.</p>	Each	\$31,414.61
54151S	WSHOP M23-005	Membership Add Ons	McLean Online Workshop Membership (per work- shop with membership)	<p>Add an Online Workshop to a McLean membership to obtain our lowest Workshop prices.</p> <p>Online Workshops offer an easy way to accelerate your project. We take you through every phase of your project and ensure that you have a roadmap in place to complete your project successfully. Over the course of one week, our expert facilitators help you complete a key initiative, work through critical project deliverables, and train your team.</p>	Per Year	\$17,803.53
54151S	WSHOP M23-006	Membership Add Ons	McLean Online Workshop (Standalone)	<p>Online Workshops offer an easy way to accelerate your project. We take you through every phase of your project and ensure that you have a roadmap in place to complete your project successfully. Over the course of one week, our expert facilitators help you complete a key initiative, work through critical project deliverables, and train your team.</p>	Each	\$22,321.41
54151S	M23T-003	Management Fundamentals Cohort	McLean Management Fundamentals Online Training Course (one cohort with membership)	<p>Provide managers with the opportunity to study management concepts at their own pace, from the comfort of their home or office, over multiple weeks. McLean & Company facilitators guide live discussions with participants to deepen learning.</p> <p>The Management Fundamentals Online program spans 12 weeks, and each cohort can include up to 30 participants.</p>	Per Year	\$27,949.62

F23 Pricing

54151S	M23T-004	Management Fundamentals Cohort	McLean Management Fundamentals Online Training Course (one cohort without membership)	<p>Provide managers with the opportunity to study management concepts at their own pace, from the comfort of their home or office, over multiple weeks. McLean & Company facilitators guide live discussions with participants to deepen learning.</p> <p>The Management Fundamentals Online program spans 12 weeks, and each cohort can include up to 30 participants.</p>	Each	\$38,000.00
54151S	M23T-001	Management Fundamentals	McLean Management Fundamentals Online Leadership Support Session (add-on to Management Fundamentals Cohort)	<p>This blended learning session helps managers of Management Fundamentals Online participants to become familiar with key concepts to support the development of their team members and sustain adoption of new behaviors.</p> <p>This session cannot be sold separately.</p>	Each	\$4,498.74
54151S	M23T-007	Membership Add Ons	McLean Facilitated Remote Training	<p>Develop your managers with our varied, interactive, remote training sessions that are 3 hours each. A minimum of 5 up to a maximum of 15 participants are required.</p> <p>Topics include:</p> <ul style="list-style-type: none"> • Lead Through Change • Leading Hybrid Teams • Build Key Resilience Behaviors • Provide Impactful Feedback • Adopt Inclusive Leadership Behaviors • Give Effective Feedback & Coaching • Build Data Literacy for HR 	Per Session	\$6,030.23

F23 Pricing

54151S	M23-900	McLean Elevate HR Online	McLean Elevate HR Online	Elevate HR is an interactive online program designed to develop strategic HR leaders by homing in on key competencies and leadership behaviors through expert facilitation, engaging activities, and peer learning. Private online cohort with up to 30 attendees.	Per Cohort	\$47,858.94
54151S	M23T-010	Membership Add Ons	Leadership Development Coaching (Up to 10 Leaders with membership)	One-on-one coaching paired with our 360, Management Fundamentals, Elevate HR, or Engagement program. Each leader enrolled in the program receives 3 coaching sessions per year. The paired program must be purchased separately.	Per Year	\$8,806.05
54151S	M23T-011	Membership Add Ons	Leadership Development Coaching (11 to 20 Leaders with membership)	One-on-one coaching paired with our 360, Management Fundamentals, Elevate HR, or Engagement program. Each leader enrolled in the program receives 3 coaching sessions per year. The paired program must be purchased separately.	Per Year	\$16,176.32
54151S	M23T-012	Membership Add Ons	Leadership Development Coaching (21 to 30 Leaders with membership)	One-on-one coaching paired with our 360, Management Fundamentals, Elevate HR, or Engagement program. Each leader enrolled in the program receives 3 coaching sessions per year. The paired program must be purchased separately.	Per Year	\$23,833.75
54151S	M23T-013	McLean Remote Leadership Development Coaching	McLean Remote Leadership Development Coaching (Standalone – up to 10 Leaders without membership)	One-on-one coaching paired with our 360, Management Fundamentals, Elevate HR, or Engagement program. Each leader enrolled in the program receives 3 coaching sessions per year. The paired program must be purchased separately.	Each	\$11,007.56
54151S	M23T-014	McLean Remote Leadership Development Coaching	McLean Remote Leadership Development Coaching (Standalone – 11 to 20 Leaders without membership)	One-on-one coaching paired with our 360, Management Fundamentals, Elevate HR, or Engagement program. Each leader enrolled in the program receives 3 coaching sessions per year. The paired program must be purchased separately.	Each	\$20,292.19

F23 Pricing

54151S	M23T-015	McLean Remote Leadership Development Coaching	McLean Remote Leadership Development Coaching (Standalone – 21 to 30 Leaders without membership)	One-on-one coaching paired with our 360, Management Fundamentals, Elevate HR, or Engagement program. Each leader enrolled in the program receives 3 coaching sessions per year. The paired program must be purchased separately.	Each	\$29,768.26
54151S	WSHOP M23-100	Workshop Support	McLean Remote Workshop Add-On Session (one add-on session with membership)	Additional day of core Workshop. Can be added to an existing Workshop only and not purchased as a standalone.	Each	\$7,274.56

McLean & Company Membership Features

	Executive Counselor Membership	Leadership Membership	Advisory Membership	Team Membership	Reference Membership
Service Delivery					
Dedicated Executive Counselor	✓				
Dedicated Executive Advisor		✓			
Dedicated Account Manager	✓	✓	✓	✓	
Custom Key Initiative Plan	✓	✓	✓	✓	
Advisory Services					
Online or Remote Counselor Visits	2/year				
Quarterly Virtual Leadership Peer-to-Peer Roundtables	✓	✓			
Facilitated Networking and Special Interest Groups	✓				
Personal 360 Feedback Results Debrief	✓	✓			
Annual HR Executive Peer Forum	✓				
HR Technology Contract Review Service	✓	✓			
Price Benchmarking & Negotiation Service	✓				
Unlimited Analyst Calls	✓	✓	✓		
Research & Learning Solutions Content					
Role-Based HR Research	✓	✓	✓	✓	✓
Classroom Training Decks	✓	✓	✓	✓	✓
LMS-Ready Downloads	✓	✓	✓	✓	✓
Tools & Templates Library	✓	✓	✓	✓	✓
Software Selection Content	✓	✓	✓	✓	✓
Diagnostic & Learning Experiences					
McLean Academy Training Platform	✓	✓	✓	✓	✓
Signature Event or Training Program Ticket	2/year	1/year			
HR Stakeholder Management Diagnostic	✓	✓	✓		
HR Management & Governance Diagnostic	✓	✓	✓		
360 Feedback Platform	✓	✓	✓		
Employee Lifecycle Diagnostics: New Hire, Engagement & Exit*	✓	✓	✓		
McLean Connect Dashboard*	✓	✓	✓		

McLean & Company

Product Offering

Membership Types	
Executive Counselor Membership	Our highest level of service, this membership is a high-touchpoint, customized experience to help CHROs develop themselves and their teams while increasing personal and functional strategic impact. Receive 1:1 support from a highly experienced HR leader who has faced similar challenges. Included are 2 virtual or onsite meetings annually, HR Executive Peer Forum and 90-day "follow-me" service.
Leadership Membership	Executive Advisors provide strategy planning support calls to members to help curate membership content and ensure they succeed against their initiatives.
Advisory Membership	Leverage unlimited access to our team of advisors, diagnostic suite*, and library of best-practice tools, templates, training materials, and step-by-step methodologies that are proven to accelerate projects and transform HR departments.
Team Seat Access	Full access to McLean & Company's online content and Academy courses. Can only be purchased as an add-on to an Advisory-level and above membership.
Onsite Membership Add-Ons	
+ Workshop	Over one week our facilitators customize our frameworks to your unique situation and develop your team as they work through a critical initiative.
+ Management Fundamentals Cohort	Provide managers with foundational skills for successful people management. Online Delivery – 12 weeks
Leadership Support Session	This blended learning session helps managers of Management Fundamentals Online participants to become familiar with key concepts to sustain change. This session cannot be sold separately. Online Delivery.
McLean Facilitated Remote Training	
	Develop your managers with our varied, interactive, remote training sessions that are each 3 hours long. Please note there is a minimum of 5, up to a maximum of 15, participants required.
Online Training Sessions	<p>Topics include:</p> <ul style="list-style-type: none"> • Lead Through Change • Leading Hybrid Teams • Build Key Resilience Behaviors • Provide Impactful Feedback • Adopt Inclusive Leadership Behaviors • Give Effective Feedback & Coaching • Build Data Literacy for HR • Master Difficult Conversations • Master the 3i's of Employee Engagement • Foundational Communication Skills • Emotional Intelligence in Leadership
Workshops	
McLean Remote Workshop Add-on Session	Additional day of core workshop. Can be added to an existing Workshop only and not purchased as a standalone.
Development Programs	
McLean Elevate HR Online	Elevate HR Online is an interactive program designed to develop strategic HR leaders by honing in on key competencies and leadership behaviors through research-driven facilitation, engaging activities, and peer learning.
Coaching: Leadership Development Coaching	Leadership Development Coaching is tied directly to the 360 Feedback assessment results. Our trained coaches work one-on-one with your leaders in a confidential environment to accelerate their self-awareness and development.
Coaching: Leadership Development Coaching With Management Fundamentals	Management Fundamentals is a twelve-week interactive program that combines live online group learning sessions with individual eLearning modules on nine topics fundamental to people leadership. Our trained coaches work one-on-one with your leaders in a confidential environment to accelerate their self-awareness and development.
Coaching: Leadership Development Coaching With Elevate HR	The Elevate HR program is a four-month program designed to help HR professionals develop a strategic HR mindset. It is an interactive learning experience combining individual eLearning courses and a series of live online sessions with other HR professionals. Our trained coaches work one-on-one with your leaders in a confidential environment to accelerate their self-awareness and development.
Coaching: Engagement Coaching	Engagement Coaching leverages team engagement discussions from a recently completed organizational employee engagement survey. Our trained coaches work one-on-one with your leaders in a confidential environment to accelerate their confidence, self-awareness, and development in the ownership of their team's engagement action plan.

Full DEI Strategy Workshop Support

We offer support in building the organization's DEI strategy.

McLean & Company provides the resources and offerings to support the creation of a DEI strategy that will help the organization support a diverse employee base in an equitable and inclusive manner.

Diagnostic Focus Groups

Following the completion of the DEI Survey or DEI Pulse, we will:

- Debrief executive team on the survey results.
- Select categories for action planning.
- Determine makeup of focus groups.
- Facilitate up to four employee focus groups (with 8-10 participants per focus group), each two hours long, and up to two manager focus groups, also each two hours long.
- Compile results of focus groups into comprehensive report, including short-term and long-term recommendations.
- Debrief focus group feedback.
- Review and prioritize employee initiatives.

Create a Diversity, Equity, and Inclusion (DEI) Strategy

In the Online DEI Strategy Workshop we will:

- Gather additional data assessments.
- Conduct a current-state analysis.
- Determine the purpose of DEI.
- Identify key communication messages and timing.
- Select initiatives and plan to launch the strategy.
- Build draft action plans.

DEI Governance Model Development

- Identify the recommended governance model.
- Conduct a stakeholder analysis and identify change agents and champions.
- Identify roles and accountabilities for each component of the governance model.

Action & Communication Planning

- For each milestone, identify action steps that must occur to complete it and indicate who owns the action, which groups are involved, who will perform the action, any risks associated with it, whether communication is required, the start and end dates, and if there are associated prerequisites or dependencies.
- For any milestones that require communication, outline key messaging, communicator, etc.

Employee Lifecycle Analysis

- Analyze the people implications and identify who is part of each stage of the employee lifecycle.
- Analyze the process implication and evaluate the existing processes to identify systemic changes needed to improve DEI at each stage of the lifecycle.
- Analyze the technology implications and assess the technology or other resources used in each stage of the lifecycle for inequities.

McLean & Company's Executive & Leadership Service Levels

Executive Counselor Membership

Includes all features of the Leadership Membership PLUS:

- 2 online or onsite analyst visits
- Prescheduled and ad hoc calls to move your agenda forward
- Guidance to understand and prepare for boardroom-level challenges
- Fully personalized Leadership Development Program
- Additional event ticket: 1 Signature event ticket or 1 training program ticket (transferable)
- Exclusive access to our annual HR Executive Peer Forum
- 90-day "Follow-Me" service

Leadership Membership

Includes all features of the Advisory Membership PLUS:

- Dedicated Executive Advisor
- Quarterly Virtual Leadership Peer-to-Peer Roundtable
- One 360 Feedback personal evaluation and results session
- Contract review for HR technology
- Your choice of 1 Signature event ticket or 1 training program ticket (transferable)

Advisory Membership

- Dedicated Account Manager
- Unlimited advisory assistance
- Access to diagnostics
- Full web content access
- Academy eLearning program

Executive & Leadership Access

Each MLE Account (>500 employees) requires 2 Advisory-level seats

Team Seat

- Role-based access to all research and project methodologies
- Full web content access
- McLean Academy eLearning program



McLean & Company Executive Counselor Membership

Highly Personal Service and Peer Networking

Dedicated Counselor Service

Benefit from an experienced HR leader who has walked in your shoes. A dedicated Counselor will provide you with 1:1 coaching to accelerate your personal development and help you tackle professional challenges. Book scheduled meetings to stay on track or call your Counselor whenever you need them. Receive two online full-day sessions throughout the year to work on whatever you'd like.

Boardroom Preparation

Boards and executive teams are seeking more input from HR, which means CHROs need to speak their language. We'll help you understand and prepare for the boardroom-level challenges you're facing and gain buy-in for HR initiatives.

Personalized Leadership Development Accelerator Program

Start with a 360-degree review to get a holistic perspective of your leadership performance. Then, work with your Counselor to review your leadership brand. With this information, set goals for improving your brand and reaching your own development goals.

Annual HR Executive Peer Forum

This full-day event will accelerate your personal learning and development. Explore the latest research and best practices and make meaningful connections with CHRO peers.

90-Day "Follow-Me" Service

If you are in a time of transition, McLean & Company will continue to support your personal development for 90 days after you leave your current role as well as support the incoming CHRO.

Also Includes Features From:

- Leadership Membership
- Advisory Membership
- Team Seat

Online Advisory Sessions

This is your time to leverage the experience and knowledge of your Counselor with a full-day online session. Your Counselor will help you untangle your most urgent challenges and take advantage of upcoming opportunities.

+ 2 Remote or Onsite Full-Day Analyst Visits

Session Ideas:

- Make a strategic HR plan
- 1:1 coaching and development planning
- Explore best practices in HR strategy
- Prepare for an important meeting or pitch



McLean & Company Leadership Membership

Develop as an Organizational Leader

You'll get a dedicated Executive Advisor, who is a former HR leader with deep experience across many research areas. They will help you identify strategic initiatives, prioritize projects, mitigate challenges, find the relevant research or subject matter experts, and stay on track. We recommend you meet at a minimum quarterly for a touchpoint, in addition to the unlimited advisory calls while working with our SME advisory team, with flexibility to leverage additional touchpoints and select advisory calls with your Executive Advisor as you work toward delivering key initiatives.

Quarterly Leadership Peer-to-Peer Roundtable (virtual)

Leverage the expertise of fellow senior HR leaders in Quarterly Leadership Peer-to-Peer Roundtables. These 60-minute facilitated discussions are an opportunity to network and collaborate in an open, honest, and inclusive virtual space.

Event Opportunities

Your choice of one ticket to McLean & Company's Signature conference or one ticket to our Elevate HR Online strategic leadership development course is included. Ideally, we'd like you to benefit from these events, although the ticket could be transferred to a colleague.

Contract Reviews

Whether you're purchasing or renewing, our analysts will help you optimize all your software purchases:

- Know the right and wrong price for the software you're purchasing.
- Manage future costs.
- Improve your contract negotiation skills.
- Home in on the optimal contract language.

Leadership Development Feedback Tools

360 Feedback Program

Get a holistic perspective on performance with a comprehensive competency evaluation from subordinates, peers, and managers.

Also Includes Features From:

- Advisory Membership
- Team Seat

McLean & Company Advisory Membership

Systematically Improve HR

Dedicated Account Manager

Work with someone familiar with your role and organization so they can expertly guide you through your biggest challenges and major projects, then direct you to the most relevant research resources and experiences, ensuring you get the most value from your membership and maximize HR performance.

HR Diagnostics

HR Diagnostics Programs

McLean & Company diagnostics are the simplest way to collect the data you need to develop actionable insights.

- 360 Feedback
- Employee Engagement Program*
- McLean Employee Experience Monitor*
- New Hire Survey*
- Employee Exit Survey*
- Diversity, Equity & Inclusion Engagement Pulse
- Employee Retention Pulse Survey
- HR Management & Governance Diagnostic
- HR Stakeholder Management Survey

*Not included in all Advisory memberships. Refer to your Account Director for included diagnostic programs and users supported. Additional fees may be required for multilingual surveys.

Also Includes Features From:

- Team Seat

Core HR Processes

Best-Practice Research

A comprehensive, connected methodology for improving core HR processes.

Tools & Templates

Powerful tools and templates to help your team identify what's wrong and take action.

Classroom Training and LMS-Ready Downloads

Access to our ready-to-deliver training modules and materials to develop high-impact leaders.

Expert Advice

Unlimited Advisory Assistance Access

Unlimited phone access to our subject matter experts to guide you through your most challenging human resources projects.



McLean & Company Team Seat Access

Core Project Research and Thought Leadership

Account Manager

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

HR Practice-Based Research

100+ instructional blueprints for implementing proven methodologies across core HR practices:

- HR Strategy
- Culture
- Talent Management
- Talent Acquisition
- Total Rewards
- Learning & Development
- HR Technology & Operations

Tools & Templates

Powerful tools and templates to help your team identify issues and take action.

Classroom Training & LMS-Ready Downloads

Access to our ready-to-deliver training modules and materials to develop high-impact leaders.

HR Software Reports by SoftwareReviews

Detailed reviews of enterprise software, collected from real users and analyzed, provide an in-depth view into products and vendors to help with procurement.

Policy Library

An extensive collection of policy templates to expedite authoring and mitigate risk.

McLean Academy

McLean Academy is a series of online professional development courses built around our HR framework and delivered by subject matter experts.



McLean & Company Management Fundamentals Online

Help new people managers quickly excel with this interactive, blended learning experience.

Program Outline

Section 1

Team Management

- Communicate Effectively and Build High-Performing Teams
- Manage Performance
- Give Feedback and Coaching

Section 2

People Development

- Delegate and Distribute Leadership and Create Accountability
- Master Difficult Conversations and Conflict
- Provide Effective Recognition

Section 3

Personal Leadership Development

- Master the Management Mindset
- Build Key Resiliency Behaviors
- Craft a Compelling Leadership Brand
- Create an Action Plan

What Is It Like to Participate?



Managers begin this 12-week program with a live online kick-off meeting hosted by our facilitators. This is the first of several live sessions designed for interaction and peer-to-peer discussion.



Learners have one week to complete each module, which includes a video lecture (25 minutes to one hour), individual activities, and a collaborative learning community activity with other participants.



At the end of the program, several reinforcements will be provided to facilitate learning application.



Participants will download and print associated handouts to take notes and complete activities during each module.

**Boost performance through training
that provides first-time managers
with the basics of people management.**

McLean & Company Management Fundamentals Online

Program Structure



People Development



Personal Leadership Development



McLean & Company Elevate HR Online

A training program designed to develop a strategic HR mindset.

Program Outline

Elevate HR Online helps HR professionals focus on:

- 1 Building relationships** to provide value to internal and external stakeholders.
- 2 Business acumen and financial literacy** to develop an understanding of the business and industry to inform talent decisions.
- 3 Data literacy** to identify, interpret, and tell a story with talent data.
- 4 Organizational awareness** to more effectively align HR advice and strategic direction with organizational objectives.
- 5 Developing as integrated leaders** to unravel the knotty challenges that today's organizations face.

A multi-month blended learning experience including:



Self-paced eLearning modules of varying length



Live online sessions to encourage cohort interaction



Varied activities designed to encourage immediate framework application



Structured discussion questions to facilitate peer-to-peer discovery and learning



Supporting McLean resources to reinforce learning and application

You'll also complete the 360 Feedback assessment both before and after the program and multiple post-program learning reinforcements including a final case study.

With this blended learning experience, boost HR skills, develop key leadership capability for the future, and build a world-class professional network.

McLean & Company Full-Service Diagnostic Programs

Improve Employee Experience and HR Processes

New Hire Survey

Ensure recruiting and onboarding programs are effective by surveying new employees.

Employee Engagement

Move beyond measuring job satisfaction with a comprehensive view of engagement.

Diversity, Equity, and Inclusion Engagement Pulse

Take a thoughtful approach to mobilize inclusion efforts across your organization.

Employee Retention Pulse Survey

Identify the early signs of employee turnover and develop a talent retention strategy.

McLean Employee Experience Monitor

Evolve to leader-driven engagement with a real-time dashboard and results.

Employee Exit Survey

Understand why people leave the organization in order to proactively retain top talent.

360 Feedback

Empower employees with a holistic view of their performance to prioritize development.

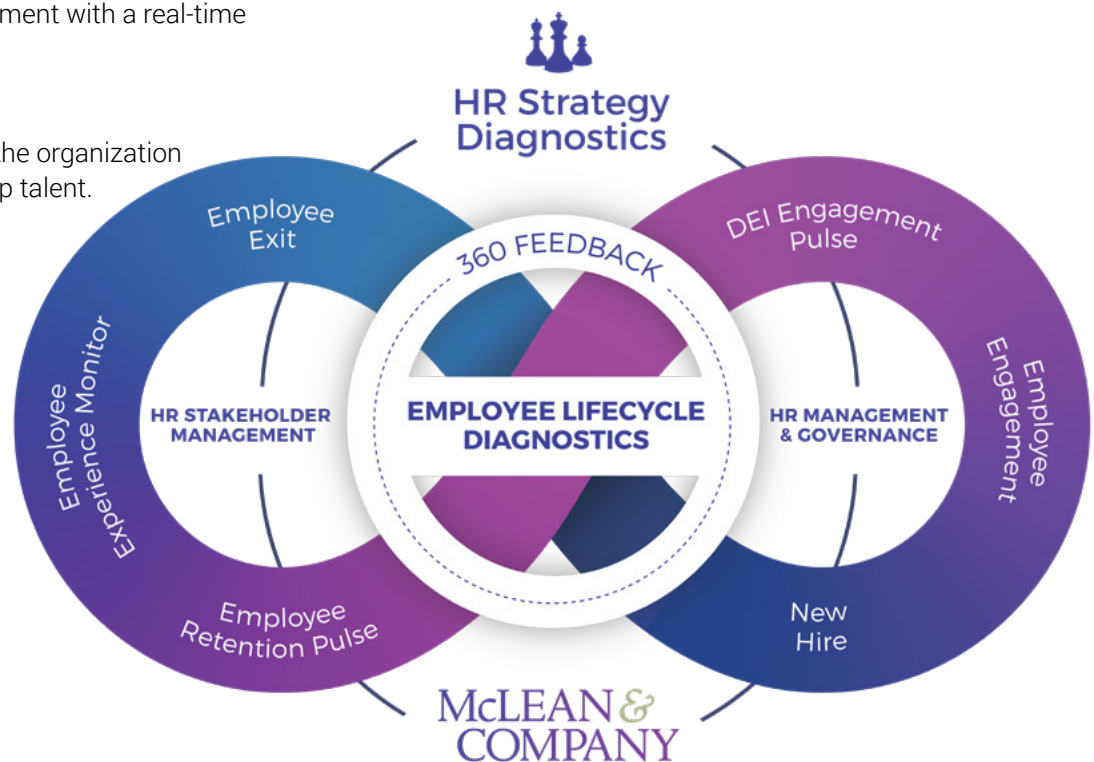
Optimize the HR Department for Success

HR Stakeholder Management Survey

Align HR initiatives with business strategy and stakeholder needs.

HR Management & Governance

Improve HR's core functions and drive project success.



McLean & Company

Online and Onsite Workshops

An innovative approach to kick-start strategic HR projects.

Your most pressing HR problems solved in less than one week

Within one week, our expert facilitators help you complete a key initiative, work through critical project deliverables, and engage your team. We use a learning-based approach to implement McLean & Company methodologies tailored to your unique situation.

Example Workshop

Create a People Strategy

Day 1	Day 2	Day 3
Identify Talent Implications of Organizational Direction <ul style="list-style-type: none">• Review strategic documentation• Conduct a SWOT analysis• Debrief HR Stakeholder Management Survey• Debrief HR Management and Governance Survey• Prioritize talent implications	Determine Strategic Pillars and HR Outcomes <ul style="list-style-type: none">• Create strategic pillars• Create HR outcomes	Evaluate HR’s Ability to Achieve the Outcomes <ul style="list-style-type: none">• Conduct a SWOT for HR• Identify gaps to deliver HR outcomes• Create initiatives and a timeline for implementation• Review existing initiatives for alignment with new talent strategy

McLean & Company

GSA Approved Terms of Use

This document states the terms and conditions under which you may use this website and the Services, which are the property of "McLean & Company" a division of Info-Tech Research Group Inc. Your use of this site and the Services constitutes acceptance of these terms and conditions.

1. General Use Restrictions

"McLean & Company" services, advice, materials, products, websites and network (collectively the "Services") are to be used for the User's (meaning a user that uses the publicly available Services, or is authorized by "McLean & Company" to use the Services that require paid access) internal use and benefit only pursuant to the terms and limitations of the paid subscription and may not be disclosed, disseminated or distributed to any other party, except as "McLean & Company" otherwise agrees in writing. The User will not circumvent any encryption or otherwise gain access to Services for which the User has not been expressly granted the appropriate rights of access.

The User will not use the Services for or knowingly transmit to "McLean & Company" or upload to any "McLean & Company" site or network any illegal, improper or unacceptable material or use them for illegal, improper or unacceptable practices including without limitation the dissemination of any defamatory, fraudulent, infringing, abusive, lewd, obscene or pornographic material, viruses, trojan horses, time bombs, worms, or other harmful code designed to interrupt, destroy, or limit the function of any software, hardware or communications equipment, unsolicited mass email or other internet based advertising campaigns, privacy breaches, denial of use attacks, spoofing, or impersonation.

2. Copyright

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The Services are owned by and copyrighted by "McLean & Company" and other parties and may contain trademarks of "McLean & Company" or others. They are protected by Canadian, U.S. and international copyright and trademark laws and conventions.

User may use the Services solely for its own internal information purposes pursuant to the terms and limitations of the paid subscription. The User may however forward individual articles contained in the Services to colleagues and others who may be interested in a specific article provided all copyright, trademark and other notices are not altered or removed. In addition, the User may download any policies or templates for their internal use. The User may alter the policy or template and remove any copyright, trademark or other notices and may share the document internally with colleagues only via LAN or intranet.

Any other reproduction of the Services in any form or by any means is forbidden without "McLean & Company's" written permission, and without limiting the generality of the foregoing, the User will not:

- a. record and re-transmit the Service over any network (including any local area network), except as otherwise stated above;
- b. use any Service in any timesharing, service bureau, bulletin board or similar arrangement or public display;
- c. post any Service to any other online service (including bulletin boards or the Internet);

- d. sublicense, lease, sell, offer for sale or assign the Service; or
- e. use "McLean & Company's" name or any excerpts from the Services in the promotion of its products or services.

3. Users

Users must be authorized to use the Services by "McLean & Company", and if a User uses the Services by virtue of being an employee, consultant or independent contractor of a User entity that has paid for the Services, must also be authorized by that entity. Such Users who are consultants or independent contractors for another User may only use the Services exclusively for the benefit of that User entity. Users must maintain and protect the confidentiality of any password(s), and are responsible to ensure that the passwords are effective. Users shall advise "McLean & Company" immediately if they discover that their password has been compromised, at the following number 1-877-821-0480 (US & CAN).

4. User Submissions

"McLean & Company's" research services include the ability for clients to contribute content for publication on "McLean & Company's" websites. If your account is used to submit, post, or add content to "McLean & Company's" websites, (collectively, "User Submissions"), you agree to accept sole responsibility for those User Submissions, including the information, statements, facts, and material contained in any form or medium (e.g., text, audio, video, and photographic) therein.

When you provide any User Submission to us, you grant us, our affiliates, and our partners, a worldwide, irrevocable, royalty-free, nonexclusive, sub-licensable license to use, reproduce, create derivative works of, distribute, publicly perform, publicly display, transfer, transmit, distribute, and publish such User Submission, and subsequent versions thereof. You agree you will not attempt to enforce any so-called "moral rights" in your User Submission against us, our affiliates, and/or our partners. This license will apply to the distribution and the storage of your User Submission in any form, medium, or technology now known or later developed.

By using "McLean & Company's" research services, you agree that none of your User Submissions will:

- infringe on the intellectual property, trade secret, privacy, publicity, or other rights of others;

- contain false statements or misrepresentations that could damage "McLean & Company" or any third party;
- include obscene, libelous, defamatory, threatening, harassing, abusive, hateful, sexually explicit, sexually oriented, profane, or embarrassing material, as determined by "McLean & Company" in its sole discretion;
- be illegal or otherwise objectionable;
- contain the personal information of any third party, including, without limitation, addresses, phone numbers, email addresses, Social Security numbers, and credit card numbers;
- encourage or facilitate insider trading or anticompetitive behavior;
- include commercial advertisements or solicitations; or
- purport to or actually provide legal or professional advice.

Because "McLean & Company's" Web sites are available to the public, we cannot guarantee that User Submissions on "McLean & Company's" Web sites will remain confidential.

Although you are solely responsible for the content you provide and we do not have a policy of reviewing or monitoring all User Submissions, we reserve the right to pre-screen and/or monitor User Submissions. If we become aware of User Submissions that violate these Terms of Service or that we believe to be otherwise objectionable, we may reject or delete them, or take other action, without notice to you and in our sole discretion.

If you believe that any User Submissions appear to violate these Terms of Service, or if you believe any other user is engaged in illegal, harassing, or objectionable behavior, please contact us.

You acknowledge, consent and agree that "McLean & Company" may access, preserve and disclose your account information and content if required to do so by law or in a good faith belief that such access, preservation, or disclosure is reasonably necessary to (i) comply with legal process; (ii) enforce these Terms; (iii) respond to claims that any content violates the rights of third parties; (iv) respond to your requests for customer service; or (v) protect the rights, property, or personal safety of "McLean & Company", its users and the public.

5. Non-Disclosure of Confidential Information

In consideration of, and reliance upon, the covenants of Company and "McLean & Company" herein contained, the parties have or will disclose to each other certain information (hereinafter referred to as "Confidential Information"), including, without limitation, information concerning future or proposed products, financial performance and projections, customers, employees, contracts, strategic relationships, marketing plans and business plans and other information disclosed by a party (the "Disclosing Party") to the other party (the "Receiving Party"). Information which is disclosed orally shall not be considered Confidential Information unless (i) it is identified as Confidential Information prior to such disclosure, and (ii) it is memorialized in writing within fifteen (15) days following such disclosure by the Disclosing Party. Information which is disclosed visually or in tangible form (whether by document, electronic media or other form) shall not be considered Confidential Information unless it is clearly marked as Confidential Information, whether disclosed orally, visually or in tangible form (whether by document, electronic media or other form). Information shall not be considered Confidential Information if:

- It was in the public domain at the time of communication to the Receiving Party or is later placed in the public domain by the Disclosing Party;
- It entered the public domain through no fault of the Receiving Party subsequent to the time of disclosure hereunder to the Receiving Party;
- It was in the Receiving Party's possession free of any obligation of confidence prior to disclosure hereunder; or
- It was developed by employees or agents of the Receiving Party independently of and without reference to any Confidential Information.

Except as provided herein, "Confidential Information" shall include, without limitation, proprietary, technical, marketing, operating, performance, cost, business pricing policies, programs, inventions, discoveries, trade secrets, techniques, processes, source code, unlinked object modules, computer programming techniques, and all record bearing media containing or disclosing such information and techniques disclosed pursuant to this Agreement. Information regarding current products shall be treated as non-"Confidential Information" unless marked "Confidential".

The Receiving Party shall not disclose, publish or communicate the Confidential Information to any third party without the prior written consent of the Disclosing Party. However, the Receiving Party may disclose the Confidential Information to a third party who has a need to know the Confidential Information and (i) is an accountant, attorney, underwriter or advisor under a duty of confidentiality; or (ii) is under a written obligation of confidentiality at least as restrictive as this Agreement.

6. Term

Many of the Services are "subscription" services that have a fixed Term and must be renewed in writing at the end of the term for services to continue. Contractual term of membership is generally one (1) to three (3) years in length and is agreed to by the parties in writing. Workshops purchased as part of membership expire without refund or credit at the end of the membership period covered by the purchase. Workshops purchased outside membership expire without refund or credit one (1) year after purchase. "McLean & Company" may terminate a User's access at any time if the User or the entity paying for the User's access violates the terms of use or subscription or any other agreement with Info-Tech.

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"McLean & Company" may change or discontinue any aspect of its Services at any time, including content or features. "McLean & Company" also reserves the right to change the terms and conditions applicable to use of the Services. Use of the Services after such changes shall be deemed to be acceptance by User of such changes. These terms were last revised on June 12, 2020.

9. Accuracy of Information and Warranty

The information contained in the Services has been obtained from sources believed to be reliable but "McLean & Company" does not warrant the completeness, timeliness or accuracy of any information contained in the Services. The Services are intended to: help identify business risks; provide insights based on industry research; and to help you focus on certain matters which may be affecting your business. "McLean & Company" does not provide legal, accounting or other

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“McLean & Company” expressly excludes and disclaims all express or implied conditions, representations and warranties including, without limitation, any implied warranties or conditions of merchantability or fitness for a particular purpose, to the extent allowable by law.

Although “McLean & Company” takes reasonable steps to screen Services for infection by viruses, worms, Trojan horses or other code manifesting contaminating or destructive properties before making the Services available, “McLean & Company” cannot guarantee that any Service will be free of infection.

User assumes sole responsibility for the selection of the Services to achieve its intended results. The opinions expressed in the Services are subject to change without notice.

“McLean & Company” does not endorse third party products or services. “McLean & Company” assesses and analyzes the effectiveness and appropriateness of information technology in the context of a general business environment only unless specifically hired by a User to assess in the context of their own environment.

10. Limitation of Liability

In no event is “McLean & Company” liable for any direct, special, indirect, consequential, incidental, punitive or other damages however caused, whether in contract, tort, negligence, strict liability, operation of law or otherwise, (including without limitation damages for lost profits, business interruption or loss arising out of the use of or inability to use the Services, or any information provided in the Services, or claims attributable to errors, omissions or other inaccuracies in the Service or interpretations thereof), even if “McLean & Company” has been advised of the possibility of such damages. “McLean & Company’s” total liability shall in no event exceed the amount paid by the User for the Service in question.

The User acknowledges that “McLean & Company” has set its prices and sold the Services to it in reliance on the limitations

of liability and disclaimers of warranties and damages set forth herein, and that the same form a fundamental and essential basis of the bargain between the parties. They shall apply even if the contract between the User and “McLean & Company” is found to have failed in its fundamental or essential purpose or has been fundamentally breached.

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Any third-party sites that are linked to the Services are not under “McLean & Company’s” control. “McLean & Company” is not responsible for anything on the linked sites, including without limitation any content, links to other sites, any changes to those sites, or any policies those sites may have. “McLean & Company” provides links as a convenience only and such links do not imply any endorsement by “McLean & Company” of those sites.

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The Services are not intended to be used for the purpose of, or as a basis for, making investment decisions or recommendations with respect to securities of any company or industry and “McLean & Company” assumes no liability for decisions made, in whole or in part, on the basis of any information contained in the Services.

13. Governing Law

This site and agreement is governed by the laws of the Province of Ontario, Canada, excluding any conflicts of law provisions and excluding the United Nations Convention on Contracts for the International Sale of Goods. Any legal action against “McLean & Company” shall take place in the courts of the Province of Ontario. The parties attorn to the non-exclusive jurisdiction of the courts of Ontario.

14. Entire Agreement

These standard terms of use, together with any service agreements and statements of work signed by the parties, contains the complete and exclusive statement of agreement between the parties and supersedes all purchase order terms and conditions, understandings, proposals, negotiations, representations or warranties of any kind whether written or oral. These terms and conditions may not be modified except via written agreement signed by both parties.

McLean & Company GSA Approved Privacy Policy

This is the privacy policy of McLean & Company. This document explains McLean & Company's policies for the collection, use and disclosure of personal information.

The Information We Collect

McLean & Company collects information by various methods, including information actively provided by its lead providers and its customers and information arising from customer surveys and general feedback.

The types of personal information we collect include name, contact information, identification information, and credit information. Credit card information is used for billing purposes only. We may record calls to or from our customer service representatives for purposes of accuracy, performance reviews, training and General quality assurance.

How We Use This Information

This information is used to provide our various products, including customer service, accounting, billing, and collections, and in the marketing of other McLean & Company products.

McLean & Company may use aggregate or anonymous information, which will not be linked to identified individuals, for various other uses for itself and third parties. The identity of our corporate clients is not considered personal or confidential information, and we may disclose that information for promotion and marketing purposes.

McLean & Company users may have the option to participate in online discussion communities. Such communities are exclusive communities for certain McLean & Company subscribers and are accessible only by subscribers through their McLean & Company login name and password. Participation in the community is completely voluntary. By opting into the community, subscribers agree to share basic contact information (name, company, address) with their peers in the community.

Who We Share This Information With

McLean & Company does not share personal information with any third parties except as disclosed in this policy. McLean & Company may provide personal information to McLean & Company's consultants, subcontractors, and professional advisors (which shall be bound by privacy obligations) to assist McLean & Company's uses disclosed herein.

Security

Personal information is stored in a combination of paper and electronic files. They are protected by security measures appropriate to the nature of the information.

Accessing Information

Individuals may review their personal information contained in McLean & Company files by contacting the McLean & Company privacy officer. If an individual believes that any of their personal information is inaccurate, we will make appropriate corrections.

Cookies

Cookies are used by McLean & Company for the convenience of our users. They are used to streamline access to the online subscriber service. Cookies automatically authenticate the user. A user can access McLean & Company products with the cookie feature turned off; however, in doing so they may find themselves challenged for username and password information on multiple occasions. McLean & Company also uses cookies to track users' visits and uses that information to improve user experience and track use of our products.

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McLean & Company seeks out the best web sources and resources for our advisory services. Many of our pages contain links to information at other websites. When you click on one of these links, you are moving to another website. We encourage you to read the privacy statements of these linked sites, as their privacy policy may differ from ours.

General

Notwithstanding the general terms of this policy, the collection, use, and disclosure of personal information may be made outside of the terms herein to the extent provided for in any applicable privacy or other legislation in effect from time to time.

McLean & Company may disclose personal information to another entity purchasing (including for diligence purposes prior to purchase) the assets of McLean & Company, provided that entity abides by this or a similar privacy policy.

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Contact Us

For more information on McLean & Company and privacy please contact our Privacy Officer at:

Ryan Huggett

Toll Free: 1-888-670-8889 Ext. 2691