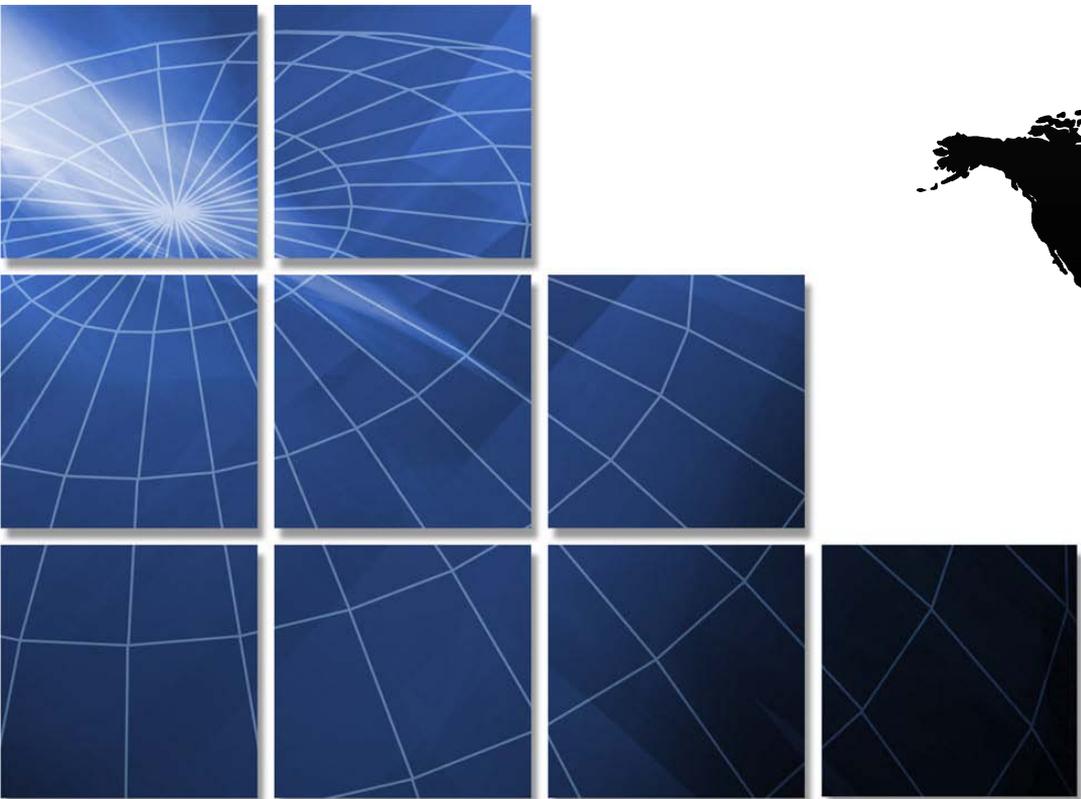


# CAI Global Partner Overview

May 2012



# CAI Global Presence – 2012

\$300m (2011), 3,000 associates, 6 continents: 1 team, 1 discipline, 1 commitment

## One CAI

### ☐ North America:

- United States: 35 metropolitan areas in 15 states
- World Headquarters: Lehigh Valley, PA
- Canada: Toronto

### ☐ Latin America:

- Argentina: Buenos Aires, Cordoba

### ☐ Europe: United Kingdom: London

### ☐ Asia:

- Philippines: Manila
- China: Shanghai
- India: Bangalore
- Singapore

### ☐ Australia: Sydney

### ☐ Middle East / North Africa:

- Kuwait: Kuwait City
- United Arab Emirates: Dubai
- Ethiopia: Addis Ababa



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# Strengths: Assets and Differentiation

- ❑ Fixed-price contracts with warranty
- ❑ Service Level Agreements based upon risk/reward model
- ❑ Contractual commitment (guarantee) of savings
- ❑ Intellectual Property (ITMPI, CAI-U)
- ❑ Core offerings/methodologies (MM, CM, QA, HD, MSS, AKC, AKT)
- ❑ Software (AMI, APO, Tracer, ITBuzz)
- ❑ Established Solution Centers (US and Manila)
- ❑ International presence
- ❑ Solid Fortune 500 and government references
- ❑ Industry vertical expertise:
  - Government applications
  - Healthcare insurance
  - Supply Chain Management (SCM) and Logistics (transportation)
  - Higher education
  - Manufacturing and Utilities
  - Fusion Center (counter terrorism, law enforcement)



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# CAI Channel Partner Program

- ❑ Program Objectives
- ❑ Benefits to Partners
- ❑ CAI's Contribution to Partner's Growth
- ❑ Partner Relationships
- ❑ Relationship Characteristics



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# CAI Channel Partner Program

## □ Program Objectives

- **Achieve CAI revenue growth objectives**
- **Achieve CAI global recognition**
- **Extend CAI marketing reach and increase market share**
- **Lower cost of sale – higher return on investment (ROI)**
- **Achieve collective size to compete effectively for Tier 1 clients**
- **Establish global presence in all geographic markets**
- **Access to new products and services to leverage across all CAI markets**
- **Extend technology expertise to respond to additional RFPs**
- **Expand vertical business expertise**
- **Promote educational alliances to improve recruiting effectiveness**



# CAI Global Partner Program Partner Benefits

- ❑ **Business expansion**
  - Referrals from CAI
  - Referrals from CAI Global partners
  - Subcontractor opportunities for large CAI and partner contracts
- ❑ **Staff augmentation**
  - Augmenting staff temporarily with CAI- or partner-provided personnel
  - Access to specialized skills and expertise through CAI Global network
- ❑ **Member of the CAI Global alliance, an internationally respected IT services network specializing in:**
  - IT application development
  - IT application support
  - Project Management
  - IT management consulting and governance
  - Business process consulting
  - Worldwide IT service delivery
  - IT risk management



# CAI Global Partner Program Partner Benefits (continued)

## ❑ Business Process Support

- PIEmatrix license and training
- DotNetNuke license and training

## ❑ Marketing

- CAI-managed e-mail sales campaigns (via SFDC and Eloqua)
- Accelerating IT Success (AITS) daily newsletters for customers and leads
- AITS podcasts
- Your company advertising in AITS
- CAI's IT Metrics and Productivity Institute (ITMPI®) webinars
- ITMPI regional conferences
- ITMPI newsletter for your customers and leads

## ❑ Education

- ITMPI webinars, white papers, Tweets, blogs, conferences
- CAI-University (CAI-U) courses
- Catalyst business training
- CAI best practices training



# CAI Global Partner Program Partner Benefits (continued)

- ❑ **Access to CAI Intellectual Property (IP)**
  - **ITBuzz IT Management Suite**
  - **Advanced Management Insight (AMI)**
  - **Automated Project Office (APO)**
  - **Managed Maintenance (MM) and Tracer©**
  - **Application Knowledge Capture (AKC)**
  - **Application Knowledge Transfer (AKT)**
  - **Web and mobile application development – DotNetNuke**
  - **Process management – PIEmatrix**
  - **IT process consulting**
  - **Vertical industry products and services**
- ❑ **Access to CAI Global Partners' IP**
- ❑ **Global Alliance Communication**
  - **Partner Update Newsletter**
  - **Partner Portal on CAI Global web site**
  - **Partner Advisory Council annual meeting**



# CAI Channel Partner Program

## □ Partner Relationships

- Sales Agent
- Delivery Partner
- Strategic Partner
- Joint Venture

## □ Relationship Characteristics

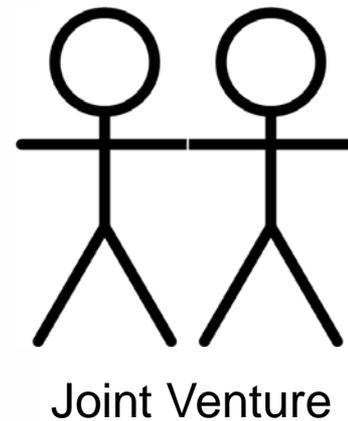
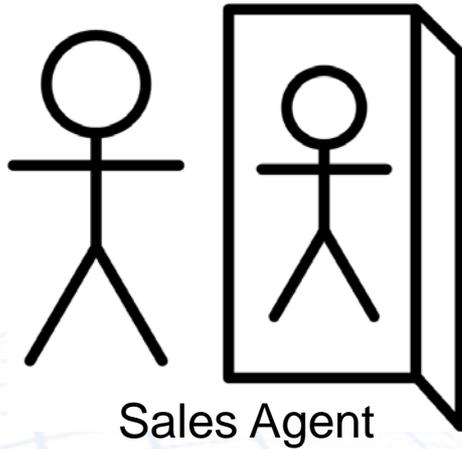
- Definition/characteristics
- Benefits to partner
- Expectations of partner
- Benefits to CAI
- Expectations of CAI
- Service Level Agreements (SLAs)
- Intellectual Property (IP) sharing
- Recruiting



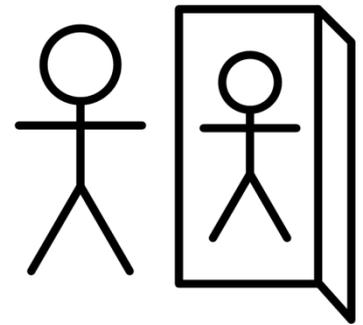
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# Partner Relationships



# Sales Agent



## □ Definition

- Individual with viable contacts who is able to orchestrate a serious sales discussion between CAI and a prospective client
- CAI's introduction to decision makers

## □ Characteristics

- Limited to a specific geographic territory, specific industry or specific account
- May or may not have other business interests

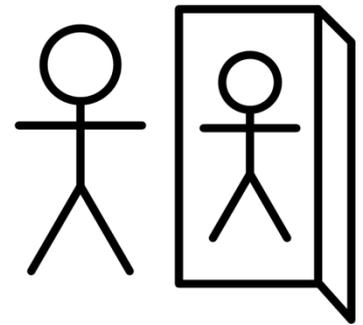
## □ Benefits to Agent

- Financial incentive based on CAI successfully contracting business
- Incentive options may take one or more of the following forms:
  - Service engagement - % of first year gross margin
  - Software sale - \$ per signed contract
- No investment required of agent
- Travel and business expenses paid by CAI (with advance approval)
- Minimal knowledge of CAI IP required (Agent is not expected to be expert on CAI products or services)



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# Sales Agent



## □ Expectations of Agent

- Agent is paid for performance
- Limited time to produce successful sale
- Defined expectation for minimum lead contacts per contractual agreement

## □ Benefits to CAI

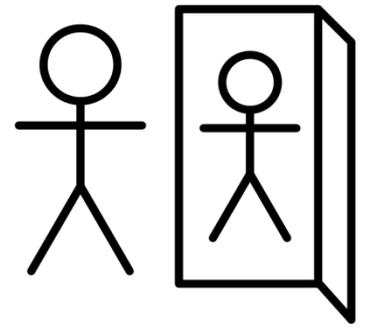
- Access to business decision makers in geographies and/or industries where CAI is not well known
  - Increase market share
  - Expand sales footprint (industry, geography)
  - Lower cost of sale, higher ROI
- Minimal investment in agent training
- Minimal risk for non-performance

## □ Expectations of CAI

- Marketing collateral
- Sales support (with qualified marketing team)



# Sales Agent



## □ Desirable Attributes

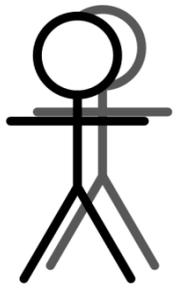
- Former CXO in key geographies and industries
- Highly regarded, highly respected by former peers and colleagues
- Clear understanding of CAI's offerings and strengths
- Energetic, proactive
- Small business owner in non-competitive (complementary) service business

## □ Recruiting

- Leverage personal relationships to recruit known individuals
- Blanket recruiting being employed in US (via LinkedIn)
- Agent is the facilitator, not part of CAI sales team



# Delivery Partner



## □ Definition

- Company seeking to partner with, merge with or re-brand itself as CAI

## □ Characteristics

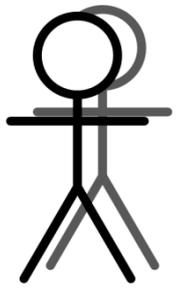
- Relatively small IT product or service company seeking to grow or to market its services more successfully

## □ Benefits to Delivery Partner

- Affiliation with CAI's global partner network
- Access to selected CAI IP (based on contractual relationship)
- Increased revenue
- Profit sharing on revenue above a pre-defined threshold
- Access to CAI marketing material
- Association with ITMPI and CAI-U
- Increased credibility in global marketplace
- Opportunities to contribute to larger engagements in partnership with other CAI affiliates and partners



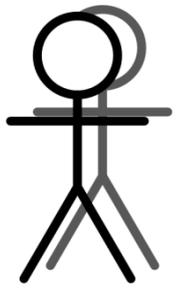
# Delivery Partner



- **Expectations of Delivery Partner**
  - **Promote CAI products and services**
  - **Partner with CAI in service delivery**
  - **Optional rebranding as CAI**
  
- **Benefits to CAI**
  - **Increased revenue**
  - **Extended global presence**
  - **Access to additional products and services**
  - **Access to additional engagement opportunities**
  - **Leverage both firm's assets to offer a unique or competitive service**
  - **Increase market share**
  
- **Expectations of CAI**
  - **Sales support**
  - **IP licensing, e.g., Tracer, APO, AMI, etc.**



# Delivery Partner



## □ Desirable Attributes

- Relatively small IT product or service company with presence in key geographic region(s) or market niche in strategic vertical industries
- Growth plateau imminent
- Presence in strategic geographic regions
- Services similar to or complementary with CAI
- Particular services that may be of value to CAI customers

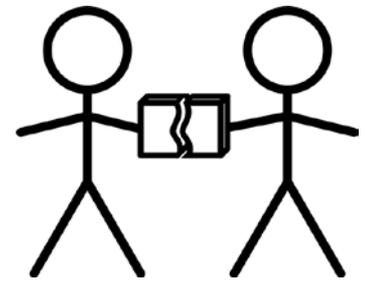
## □ Recruiting

- Growth experience
- Current size (employees and revenue)
- Current client list (overlap with existing CAI clients)
- Mission or stated philosophy that aligns with CAI
- Awards, recognition, certifications, etc.



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# Strategic Partner



## □ Definition

- Company with products or services complementary to CAI's offerings

## □ Characteristics

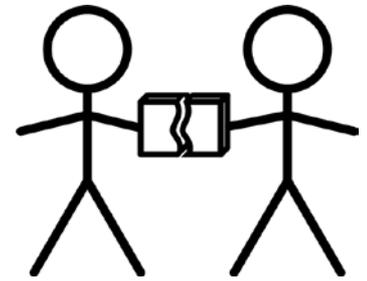
- Strategic Partner may be a national or international IT services company with skills, clients or vendor relationships that CAI does not possess
- Strategic Partner may be global integrator
- Strategic Partner may be a small ("niche") product vendor

## □ Benefits to Strategic Partner

- Joint proposal and delivery more complete than Strategic Partner or CAI can achieve alone
- Leverage both firms' assets to provide a unique or more competitive service
- Leverage CAI's ability to commit to fixed-price contracts with defined SLAs
- Profit sharing (50/50)
- CAI's international channel partner network
- CAI's IP (such as Tracer, APO, AMI, ITBuzz, etc.)
- Limited investment
- Joint sales planning and presentation
- Joint solution development and training



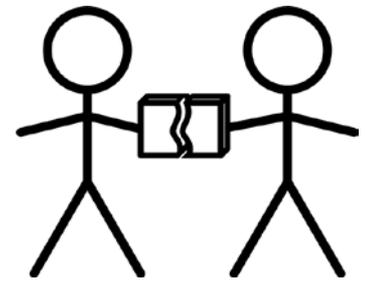
# Strategic Partner



- ❑ **Expectations of Strategic Partner**
  - **Legally binding mutual non-disclosure agreement**
  - **Indemnification of CAI whenever Strategic Partner is primarily responsible for contract**
  
- ❑ **Benefits to CAI**
  - **Access to additional engagement opportunities**
  - **Leverage both firm's assets to offer a unique or competitive service**
  - **Expanded sales footprint**
  - **Expanded revenue footprint**
  - **Increase market share**
  
- ❑ **Expectations of CAI**
  - **Sales support**
  - **Solution team support**
  - **IP licensing, e.g., Tracer, APO, AMI, etc.**



# Strategic Partner



## □ Desirable Attributes

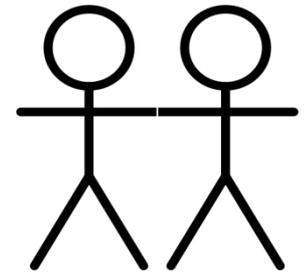
- Products and services complementary to CAI IP
- Geographic presence complementary to CAI existing client base
- Holes in offerings where CAI can add value
- Service offering that may be of value to CAI customers
- Specialized (niche) company with limited product offering that requires CAI interfaces, implementation or customization

## □ Recruiting

- Philosophy in alignment with CAI
- Willingness to partner with CAI
- Acknowledgement that together Strategic Partner and CAI can deliver a better or more complete solution than either company alone



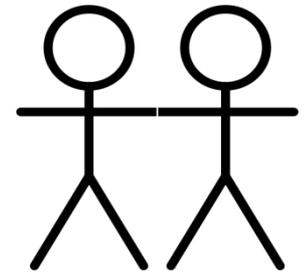
# Joint Venture



- ❑ **Definition**
  - **Entity in which CAI has equity ownership**
  - **Extension of CAI**
  
- ❑ **Characteristics**
  - **Subsidiaries: owned 100% by CAI**
  - **Joint Ventures (JVs): mutually owned by CAI and partner**
  
- ❑ **Benefits to Affiliate**
  - **Access to all CAI Intellectual Property (IP)**
  - **Profits shared in accordance with equity investment (typically 50/50)**
  - **Input to CAI strategies and objectives**
  - **Principal CAI presence in geographic region**
  - **Share revenue generated by agents and partners in a specific geographic region**



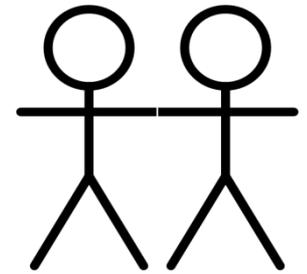
# Joint Venture



- ❑ **Expectations of Affiliate**
  - **Equity investment required of partner**
  - **Expected to be knowledgeable about CAI products and services**
  
- ❑ **Benefits to CAI**
  - **Presence in and access to additional markets**
  - **Access to affiliate's experience and expertise**
  - **Scale: increased leverage in receiving and responding to Tier 1 company RFPs**
  - **Access to lower-cost IT resources (relative to US employment market)**
  
- ❑ **Expectations of CAI**
  - **Training of affiliate staff in CAI products and services**
  - **Marketing material**
  - **Delivery quality assurance through initial engagements**



# Joint Venture



## □ Desirable Attributes

- Established operation and proven success
- Technology or business expertise to complement CAI portfolio
- Contacts: business, government, academia

## □ Recruiting

- Presence in strategic geographic regions
- Services similar to CAI
- Gaps in current service offerings where CAI can add value
- Particular services that may be of value to CAI customers
- How long in business
- Growth experience
- Current size (employees and revenue)
- Current client list
- Mission or stated philosophy that aligns with CAI
- Awards, recognition, certifications, etc.

