

Proposal for Cloud Services
Prepared for:

By:



06:44:00

Point of Contact:

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nControl, LLC. – PROPRIETARY

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Scope

nControl is pleased to submit this estimate to <client>.

Phase One – Discovery

nControl will use the CMM checklist and interviews to complete a migration/needs analysis to understand what is required from a project management standpoint. This analysis will also include the process/application ecosystem associated with the migrating system/application. A business case/report/memorandum will be delivered for this phase.

Phase Two – Requirements

This phase focuses on ensuring that the cloud provider chosen is the best match for the consumer, and that the service is procured at the best price with the best terms. Deliverables here include an RFI/RFP, vendor selection matrix, chosen vendor, SLA/contract, and a RDD.

Phase Three – Design

nControl will assist in designing the solution for the client. In essence, nControl will piece the cloud solution(s) together with the consumer's legacy systems, existing network, partners/vendors systems and existing processes. For integration purposes, high and low-level design documents will be created, as well as a roadmap if necessary.

Phase Four – Implementation

nControl will assist the client in planning the migration to the cloud. We advocate that a phased, parallel deployment strategy be used here for continuity and Quality of Service (QoS) purposes. The deliverable here will be an implementation plan.

Phase Five – Maintenance

nControl will work with the client in planning the maintenance period of the cloud. The maintenance phase will focus on maintaining the environment accordingly. System monitoring, configuration management, upgrades and additional functionality are key elements here. The deliverable is the maintenance plan.

Engagement Assumptions

1. nControl suggests that an iterative project management methodology (e.g. Agile Scrum) be used to help flush out the appropriate scope, schedule and budget for this project. **In the interest of establishing a baseline cost and effort/resource estimate, nControl has created this document.**
2. nControl assumes that <client> will appoint local points of contact (POC) for the project.
3. nControl assumes that our consultants will be provided the information and tools necessary to accomplish the project tasks, namely: user accounts, existing program documentation (policies, procedures and/or standards), Program/Project Management Office (PMO) artifacts/standards, access to and/or downloadable clients for specific inventory/archival/project management/document management/content management software, change management processes/protocols, communication management requirements/protocols, training and awareness materials, and finally access to <client> subject matter experts (SME) and/or management as needed.
4. nControl assumes that any work outside the direct scope of this estimate will require, and be subject to, a scope change process/order. Examples include: system implementation/integration, managing direct tasks, executing direct tasks, additional

software/vendor selection, executing extensive process improvement tasks (100+ hours), and/or conducting post-implementation audits/assessments.

Deliverables

- a) Documentation of the retention schedule gap analysis.
- b) An action plan after reviewing and updating the retention schedule with outside counsel.
- c) A project plan for implementing the RIM program for each required company.
- d) Semi-monthly (twice a month) status reports, timesheets, expense reports and balanced scorecards.
- e) Appropriate program documentation (as-is process diagrams, to-be process diagrams, current org chart, risk remediation plan, internal resource staffing plan, 3-5 year RIM program strategic roadmap, tactical to-do list, maturity model standings – according to GARP standards, balanced scorecard creation, management dashboard(s), training & awareness content).
- f) Determined/discovered process improvement tasks/areas for improvement.

Project Timeline and Description

Below is a description of the various tasks involved in conducting this project with a projected timeline.

Phase One – Discovery (1 Resource)

nControl will use the CMM checklist and interviews to complete a migration/needs analysis to understand what is required from a project management standpoint. This analysis will also include the process/application ecosystem associated with the migrating system/application. A business case/report/memorandum will be delivered for this phase.

Proposed dates: 4/1/2011 – 4/4/2011

Phase Two – Requirements (1 Resource)

This phase focuses on ensuring that the cloud provider chosen is the best match for the consumer, and that the service is procured at the best price with the best terms. Deliverables here include an RFI/RFP, vendor selection matrix, chosen vendor, SLA/contract, and a RDD.

Proposed dates: 4/7/2011 – 4/25/2011

Phase Three – Design (1 Resource)

nControl will assist in designing the solution for the client. In essence, nControl will piece the cloud solution(s) together with the consumer's legacy systems, existing network, partners/vendors systems and existing processes. For integration purposes, high and low-level design documents will be created, as well as a roadmap if necessary.

Proposed dates: 5/2/2011 – 7/29/2011

Phase Four – Implementation (1 Resource)

nControl will assist the client in planning the migration to the cloud. We advocate that a phased, parallel deployment strategy be used here for continuity and Quality of Service (QoS) purposes. The deliverable here will be an implementation plan.

Proposed dates: 5/2/2011 – 7/29/2011

Phase Five – Maintenance (1 Resource)

nControl will work with the client in planning the maintenance period of the cloud. The maintenance phase will focus on maintaining the environment accordingly. System monitoring, configuration management, upgrades and additional functionality are key elements here. The deliverable is the maintenance plan.

Proposed dates: 5/2/2011 – 7/29/2011

Project Schedule (Gantt Chart)

Service Provider Cost Breakdown Estimate

Please Note: These prices are coming from the vendors themselves. We have used this proposal template to aggregate the estimated costs for an understanding of your total costs.

Cloud Service Provider	Service	Cost/Unit
Total Service Costs		

Labor Cost Breakdown Estimate

Please Note: This estimate is given on a **time and materials, plus reimbursable expenses, basis.** Timesheets and expense reports will be **submitted semi-monthly (twice a month) for payment.** Client and nControl will track budget and expenses, while nControl will manage scope, schedule and the project budget.

Task Breakdown and Labor Cat	Hours	Billable Rate	Billable Total
Labor Costs			

Estimated Travel Expenses

Estimated Travel Expenses	Days	Total
Total		

Total Price: SERVICE

Note: nControl greatly appreciates the opportunity to bid on this project. If <client> feels that we have over-estimated the hours or level of effort, we would like the opportunity to adjust our proposal to ensure we are competitive in the bidding process.

About nControl

nControl is a consulting firm formed in 2007 and based in Philadelphia. The firm specializes in assisting organizations with their records, security and privacy compliance needs. The company has done cloud migration work for multiple clients. The firm services the Pharmaceutical, Healthcare, Financial Services, Government, Insurance, and Business Services industries.

Team Bios

Full resumes are available upon request.

Steve Markey – Engagement Leader

Steve Markey is the Founder/Principal of nControl, a consulting firm based in Philadelphia. He has over ten (10) years of experience in the technology sector and has served as a: Chief Technology Officer (CTO), Chief Information Security Officer (CISO), IT Project Manager, and Senior Consultant. His industry experience includes: Pharmaceuticals, Healthcare, Financial Services, Legal, Government, Insurance, and Business Services.

Mr. Markey frequently presents on various topics, such as: cloud computing, information security, information privacy, process improvement, project management, information governance, and program development.

Steve presently holds several certifications, to include: Project Management Professional (PMP), Certified Information Systems Security Professional (CISSP), Certified Information Privacy Professional (CIPP), Certified Information Security Manager (CISM), Certified Information Systems Auditor (CISA), a Certificate of Cloud Security Knowledge (CCSK) and he holds a Symantec Technical Specialist (STS) designation for their Enterprise Vault product. Steve is a proud veteran of the U.S. Army and holds degrees from Drexel University and The Citadel.

In Closing

We are very grateful for the opportunity to help <client> with their cloud migration needs. Please don't hesitate to contact us with any questions.