



State of West Virginia
 Department of Administration
 Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

Request for
 Quotation

RFQ NUMBER
 FAR106065

PAGE
 1

ADDRESS CORRESPONDENCE TO ATTENTION OF
 KRISTA FERRELL
 304-558-2596

RFQ COPY
 TYPE NAME/ADDRESS HERE
 eBridge Consulting
 586 Tallwood Rd.
 Huntington WV 25705
 304-736-2800

DEPARTMENT OF ADMINISTRATION
 FINANCIAL ACCOUNTING AND
 REPORTING SECTION
 2101 WASHINGTON ST E
 CHARLESTON, WV
 25305-1510 304-558-4083

DATE PRINTED	TERMS OF SALE	SHIP VIA	FOB	FREIGHT TERMS
11/23/2009				

BID OPENING DATE: 12/30/2009 BID OPENING TIME 01:30PM

LINE	QUANTITY	UOP	QAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
0001	1	LS		906-29		
SOFTWARE ENGINEERING SERVICES FOR ERP EXPRESSION OF INTEREST (EOI) THE WEST VIRGINIA DIVISION OF PURCHASING FOR THE AGENCY, THE WEST VIRGINIA DIVISION OF ADMINISTRATION'S DIVISION OF FINANCE IS SOLICITING EXPRESSIONS OF INTEREST FOR SOFTWARE ENGINEERING, CONSULTING, AND PROJECT MANAGEMENT SERVICES FOR AN ENTERPRISE RESOURCE PLANNING SYSTEM PER THE ATTACHED. TECHNICAL QUESTIONS CONCERNING THIS EXPRESSION OF INTEREST MUST BE SUBMITTED IN WRITING TO KRISTA FERRELL IN THE WEST VIRGINIA STATE PURCHASING DIVISION VIA MAIL AT THE ADDRESS SHOWN IN THE BODY OF THIS EOI, VIA FAX AT 304-558-4115, OR VIA EMAIL AT KRISTA.S.FERRELL@WV.GOV. DEADLINE FOR ALL TECHNICAL QUESTIONS IS MONDAY, DECEMBER 14, 2009 AT THE CLOSE OF BUSINESS. ALL TECHNICAL QUESTIONS RECEIVED, IF ANY, WILL BE ANSWERED BY ADDENDUM AFTER THE DEADLINE HAS LAPSED. QUESTIONS CONCERNING THE PROCESS BY WHICH A VENDOR MAY SUBMIT AN EXPRESSION OF INTEREST TO THE STATE OF WEST VIRGINIA ARE NOT CONSIDERED TO BE TECHNICAL QUESTIONS AND MAY BE SUBMITTED AT ANY TIME PRIOR TO THE EOI OPENING AND IN ANY FORMAT.						

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SIGNATURE *[Signature]* TELEPHONE 304-736-2800 DATE 12-30-09
 TITLE Business Development FEIN 75-2879412 ADDRESS CHANGES TO BE NOTED ABOVE

WHEN RESPONDING TO RFQ, INSERT NAME AND ADDRESS IN SPACE ABOVE LABELED 'VENDOR'

GENERAL TERMS & CONDITIONS PURCHASE ORDER/CONTRACT

1. **ACCEPTANCE:** Seller shall be bound by this order and its terms and conditions upon receipt of this order.
2. **APPLICABLE LAW:** The laws of the State of West Virginia and the *Legislative Rules* of the Purchasing Division shall govern all rights and duties under the Contract, including without limitation the validity of this Purchase Order/Contract.
3. **NON-FUNDING:** All services performed or goods delivered under State Purchase Orders/Contracts are to be continued for the terms of the Purchase Order/Contract, contingent upon funds being appropriated by the Legislature or otherwise being made available. In the event funds are not appropriated or otherwise available for these services or goods, this Purchase Order/Contract becomes void and of no effect after June 30.
4. **COMPLIANCE:** Seller shall comply with all Federal, State and local laws, regulations and ordinances including, but not limited to, the prevailing wage rates of the WV Division of Labor.
5. **MODIFICATIONS:** This writing is the parties final expression of intent. No modification of this order shall be binding unless agreed to in writing by the Buyer.
6. **ASSIGNMENT:** Neither this Order nor any monies due, or to become due hereunder may be assigned by the Seller without the Buyer's consent.
7. **WARRANTY:** The Seller expressly warrants that the goods and/or services covered by this order will: {a} conform to the specifications, drawings, samples or other description furnished or specified by the Buyer; {b} be merchantable and fit for the purpose intended; and/or {c} be free from defect in material and workmanship.
8. **CANCELLATION:** The Director of Purchasing may cancel any Purchase Order/Contract upon 30 days written notice to the seller.
9. **SHIPPING, BILLING & PRICES:** Prices are those stated in this order. No price increase will be accepted without written authority from the Buyer. All goods or services shall be shipped on or before the date specified in this Order.
10. **LATE PAYMENTS:** Payments may only be made after the delivery of goods or services. Interest may be paid on late payments in accordance with the *West Virginia Code*.
11. **TAXES:** The State of West Virginia is exempt from Federal and State taxes and will not pay or reimburse such taxes.
12. **RENEWAL:** Any reference to automatic renewal is hereby deleted. The Contract may be renewed only upon mutual written agreement of the parties.
13. **BANKRUPTCY:** In the event the vendor/contractor files for bankruptcy protection, the State may deem this contract null and void, and terminate such contract without further order.
14. **HIPAA BUSINESS ASSOCIATE ADDENDUM:** The West Virginia State Government HIPAA Business Associate Addendum (BAA), approved by the Attorney General, and available online at the Purchasing Division's web site (<http://www.state.wv.us/admin/purchase/vrc/hipaa.htm>) is hereby made part of the agreement. Provided that, the Agency meets the definition of a Cover Entity (45 CFR §160.103) and will be disclosing Protected Health Information (45 CFR §160.103) to the vendor.
15. **WEST VIRGINIA ALCOHOL & DRUG-FREE WORKPLACE ACT:** If this Contract constitutes a public improvement construction contract as set forth in Article 1D, Chapter 21 of the West Virginia Code ("The West Virginia Alcohol and Drug-Free Workplace Act"), then the following language shall hereby become part of this Contract: "The contractor and its subcontractors shall implement and maintain a written drug-free workplace policy in compliance with the West Virginia Alcohol and Drug-Free Workplace Act, as set forth in Article 1D, Chapter 21 of the West Virginia Code. The contractor and its subcontractors shall provide a sworn statement in writing, under the penalties of perjury, that they maintain a valid drug-free workplace policy in compliance with the West Virginia Alcohol and Drug-Free Workplace Act. It is understood and agreed that this Contract shall be cancelled by the awarding authority if the Contractor: 1) Fails to implement its drug-free workplace policy; 2) Fails to provide information regarding implementation of the contractor's drug-free workplace policy at the request of the public authority; or 3) Provides to the public authority false information regarding the contractor's drug-free workplace policy."



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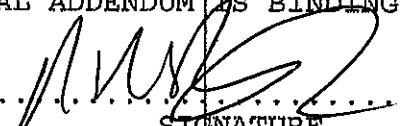
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EXHIBIT 10						
REQUISITION NO.: FAR.106065						
ADDENDUM ACKNOWLEDGEMENT						
I HEREBY ACKNOWLEDGE RECEIPT OF THE FOLLOWING CHECKED ADDENDUM(S) AND HAVE MADE THE NECESSARY REVISIONS TO MY PROPOSAL, PLANS AND/OR SPECIFICATION, ETC.						
ADDENDUM NO. S:						
NO. 1 ✓ <i>LB</i>						
NO. 2						
NO. 3						
NO. 4						
NO. 5						
I UNDERSTAND THAT FAILURE TO CONFIRM THE RECEIPT OF THE ADDENDUM(S) MAY BE CAUSE FOR REJECTION OF EOIS.						
VENDOR MUST CLEARLY UNDERSTAND THAT ANY VERBAL REPRESENTATION MADE OR ASSUMED TO BE MADE DURING ANY ORAL DISCUSSION HELD BETWEEN VENDOR'S REPRESENTATIVES AND ANY STATE PERSONNEL IS NOT BINDING. ONLY THE INFORMATION ISSUED IN WRITING AND ADDED TO THE SPECIFICATIONS BY AN OFFICIAL ADDENDUM IS BINDING.						
 SIGNATURE						

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TITLE	FEIN	ADDRESS CHANGES TO BE NOTED ABOVE

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LINE	QUANTITY	UOP	CAT NO	ITEM NUMBER	UNIT PRICE	AMOUNT
<p><i>...e.Bridge Consulting... COMPANY 12-30-09..... DATE</i></p> <p>NOTE: THIS ADDENDUM ACKNOWLEDGEMENT SHOULD BE SUBMITTED WITH THE EOI.</p> <p>REV. 09/21/2009</p> <p>BANKRUPTCY: IN THE EVENT THE VENDOR/CONTRACTOR FILES FOR BANKRUPTCY PROTECTION, THE STATE MAY DEEM THE CONTRACT NULL AND VOID, AND TERMINATE SUCH CONTRACT WITHOUT FURTHER ORDER.</p> <p style="text-align: center;">NOTICE</p> <p>A SIGNED EOI MUST BE SUBMITTED TO:</p> <p style="text-align: center;">DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION BUILDING 15 2019 WASHINGTON STREET, EAST CHARLESTON, WV 25305-0130</p> <p>THE EOI SHOULD CONTAIN THIS INFORMATION ON THE FACE OF THE ENVELOPE OR THE EOI MAY NOT BE CONSIDERED:</p> <p>SEALED EOI</p>						

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STATE OF WEST VIRGINIA
Purchasing Division

PURCHASING AFFIDAVIT

VENDOR OWING A DEBT TO THE STATE:

West Virginia Code §5A-3-10a provides that: No contract or renewal of any contract may be awarded by the state or any of its political subdivisions to any vendor or prospective vendor when the vendor or prospective vendor or a related party to the vendor or prospective vendor is a debtor and the debt owed is an amount greater than one thousand dollars in the aggregate.

PUBLIC IMPROVEMENT CONTRACTS & DRUG-FREE WORKPLACE ACT:

If this is a solicitation for a public improvement construction contract, the vendor, by its signature below, affirms that it has a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the *West Virginia Code*. The vendor **must** make said affirmation with its bid submission. Further, public improvement construction contract may not be awarded to a vendor who does not have a written plan for a drug-free workplace policy in compliance with Article 1D, Chapter 21 of the *West Virginia Code* and who has not submitted that plan to the appropriate contracting authority in timely fashion. For a vendor who is a subcontractor, compliance with Section 5, Article 1D, Chapter 21 of the *West Virginia Code* may take place before their work on the public improvement is begun.

ANTITRUST:

In submitting a bid to any agency for the state of West Virginia, the bidder offers and agrees that if the bid is accepted the bidder will convey, sell, assign or transfer to the state of West Virginia all rights, title and interest in and to all causes of action it may now or hereafter acquire under the antitrust laws of the United States and the state of West Virginia for price fixing and/or unreasonable restraints of trade relating to the particular commodities or services purchased or acquired by the state of West Virginia. Such assignment shall be made and become effective at the time the purchasing agency tenders the initial payment to the bidder.

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, limited liability company, partnership or person or entity submitting a bid for the same materials, supplies, equipment or services and is in all respects fair and without collusion or fraud. I further certify that I am authorized to sign the certification on behalf of the bidder or this bid.

LICENSING:

Vendors must be licensed and in good standing in accordance with any and all state and local laws and requirements by any state or local agency of West Virginia, including, but not limited to, the West Virginia Secretary of State's Office, the West Virginia Tax Department, West Virginia Insurance Commission, or any other state agencies or political subdivision. Furthermore, the vendor must provide all necessary releases to obtain information to enable the Director or spending unit to verify that the vendor is licensed and in good standing with the above entities.

CONFIDENTIALITY:

The vendor agrees that he or she will not disclose to anyone, directly or indirectly, any such personally identifiable information or other confidential information gained from the agency, unless the individual who is the subject of the information consents to the disclosure in writing or the disclosure is made pursuant to the agency's policies, procedures and rules. Vendor further agrees to comply with the Confidentiality Policies and Information Security Accountability Requirements, set forth in <http://www.state.wv.us/admin/purchase/privacy/noticeConfidentiality.pdf>.

Under penalty of law for false swearing (*West Virginia Code* §61-5-3), it is hereby certified that the vendor affirms and acknowledges the information in this affidavit and is in compliance with the requirements as stated.

Vendor's Name: eBridge Consulting

Authorized Signature: [Signature] Date: 12-30-09

**Expression of Interest (EOI) to
Request for Proposal
FAR-106065**

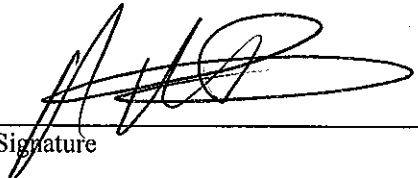
***Contract for Consulting Engineering
Services and Project Management***

Enterprise Resource Planning System



eBRIDGE Consulting, LLC
586 Tallwood Rd
Huntington, WV 25705
304-736-2800

Ryan Blake
304-395-4322 cell
December 30, 2009



Signature

12-30-09

Date

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1. Executive Summary

1.1. Background

The West Virginia Financial Information Management System (WVFIMS) has been the accounting system of record for the state since the end of the first quarter of Fiscal Year 1994. This system is a custom developed application that is physically deployed in two separate locations. One instance is installed on the Department of Administration server – the Information Services & Communication enterprise server. The second instance is installed on the West Virginia State Auditor's enterprise server managed by that office.

Direction for WVFIMS is set by the Comptroller of the State. The Comptroller works with four separate State departments in establishing the direction for the system: (1) the State Auditor's Office, (2) the State Treasurer's Office, (3) the State Budget Office, and (4) the Department of Administration's Purchasing Division. Additionally, requirements for system changes and enhancements are solicited from a user steering committee, the Legislative Auditor's Office, and other users who submit ad hoc requests.

The following statistics show the breadth of usage and importance of this system to the State and the departments utilizing it:

- *For Fiscal Year 2009, nearly one-half of the State's \$12.2 billion in expenditures was against extended accounts in the system*
- *For Fiscal Year 2010, there are 169 organizations and more than 2,700 online users utilizing WVFIMS*
- *For Tax Year 2008, more than 1,951 IRS Form 1099's were produced from the system*
- *For Fiscal Year 2010, the following is a breakdown of the financial accounts handled by the system:*
 - 3,634 State expenditure accounts
 - 8,616 extended expenditure accounts
 - 2,944 State revenue accounts
 - 1,958 extended revenue accounts

1.2. Business Drivers and Goals of the Project

The State of West Virginia plans to streamline and improve the business processes and decisions made on behalf of the taxpayers. To accomplish this goal, the State is seeking to acquire an Enterprise Resource Planning (ERP) System. Such a system is required to help the Executive Department fulfill the duties as outlined in Article 7.1 of the West Virginia Constitution.

Request for Quotation FAR-106065 has been generated to begin the process of the State selecting a Contracting Engineering Consultant to assist the State in accomplishing the primary goal above – defining the requirements for and selecting the best ERP system to provide the needed functionality and results.

More detailed business drivers and goals will be determined from looking at the various issues and inefficiencies identified by the users today, and then documenting the collective needs of

all departments that will be using the system. It is assumed that eliciting these key goals and objectives will be one of the first tasks and deliverables produced from the engagement.

1.3. Project Governance and Roles

1.3.1. State of West Virginia Role

The State of West Virginia Governor, Auditor and Treasurer will be the primary stakeholders and decision makers for this project. They will provide the necessary staff and resources to ensure the successful completion of the project.

1.3.2. Consulting Service Provider Role

- Partner with the State of W Virginia personnel to fulfill the project mission, goals, objectives and deliverables (*details are covered in sections following*)
- Provide the methodology and resources to successfully drive the project from Requirements through completion of the Implementation Strategy
- Provide Project Management services – project planning, leadership, tracking, reporting, etc.
- Provide any necessary project advisory and quality assurance services

2. Understanding of the State's Requirements

2.1. Summary of Project Scope

While the overriding objective of the project stakeholders is to select and implement an ERP system that will improve operations and provide better data for decision making, this specific RFQ is requesting consulting services and expertise for the phases leading up to but not including implementation.

2.2. Detailed Requirements for Consulting Services

2.2.1. Partnering / Resources

Overall, the State is looking for a partner to work with their internal teams in guiding this project to a successful conclusion. The consulting firm is expected to provide resources with a wide array of capabilities and skills to bring to the project, including but not limited to, technical, leadership, project management, analysis, strategic thinking and packaged software evaluation and purchase negotiation. Where needed, the selected firm resources will provide leadership and assume the lead for certain tasks and/or phases. For other focus areas, the State resources will assume the lead and the consulting firm resources will assist as needed.

2.2.2. Methodology

The State is expecting the selected Consulting Firm to provide a solid and effective methodology for performing the following phases/steps of the project:

- *Analysis of the current "as is" implementation:*
 - Current business and operational processes
 - Current business rules
 - Current system functions and user interactions
 - Current system architecture and interfaces
 - Current data architecture
 - Current limitations and issues
- *Analysis of the "to be" state:*
 - Business Vision, Needs and Requirements
 - To-be Business Processes & flows
 - Presentation of business best practices
 - Anticipated changes to the users and environment
- *Business Gap Analysis:*
 - Variations of expected business processes to current ones
 - Variations of expected functionality to current system functionality
- *Business Case and Detailed Requirements Definition*
- *End State Architecture and Infrastructure Design:*
 - Business Process Architecture requirements/design and documentation
 - Functional / Application Architecture requirements and documentation
 - Data Architecture requirements and documentation
 - Technical & Interface Architecture design and documentation
- *Technical Gap Analysis:*
 - Implementation architecture
 - Data/Database/Files
 - Interfaces to Legacy Systems and/or External Suppliers

- *Change Management Planning*
- *Implementation Planning*
- *Packaged Software Analysis, Comparison and Selection (includes development of needed diagrams or analysis artifacts to convey software capabilities versus needed features and State requirements)*
- *Gap Closure Specification:*
 - Development of the plan and design for how any limitations of the selected packaged software will be mitigated by internal changes to State of West Virginia processes or internal systems
- *System Replacement Funding and ROI Analysis:*
 - Business Case development
 - Expense analysis and ROI projections
 - Vendor software pricing model analysis (lease vs. purchase, module-based versus complete package, incremental user-based pricing, etc.)
 - Funding Plan development

2.2.3. Analysis & Requirements Specification

The State is expecting consulting resources with a very high degree of expertise at the analytical level. Analysis of the as-is business processes and systems will be followed by documenting specific requirements for the project. This will involve interviews with stakeholders, analysis of existing materials and facilitating meetings with users and key stakeholders to discuss and prioritize the requirements. A large amount of information will have to be gathered, organized, synthesized and documented in an easily understandable way.

2.2.4. Technical

A project of this type will require a depth of knowledge and technical expertise due to the sophisticated nature of the software and systems the software will interact with. A system is currently in place at two major State departments and utilized by more than 2,500 users each month. The system is expected to have significant technical complexity in both the way it interfaces with other systems as well as the technical inter-workings of the software. Additionally, the data utilized by the system and the users is complex and will require careful analysis at a low level data element and entity level. The skills of a Data Architect will be needed to analyze files, databases, movement of data, and the transformation of data from raw form to consumable form.

The second major technical aspect of the project involves the computing resource physical and logical architecture. Based on the volume of transactions, amount of data processed and number of online users, thorough technical understanding of the current systems will be needed to gather the technical requirements for the new system. The State will require technical expertise in analyzing the current metrics associated with all technical aspects of the systems and the operational processes that are enabled by the system(s). This includes functional processing, data/database/data warehouse processing and processing associated with data movement, transformation and presentation (online as well as reporting).

If the Software as a Service (SaaS) implementation model is available from the vendor(s), it may need to be considered as a viable alternative to in-house hosting of the software. If the State wishes to analyze those options and the pros and cons, the Consultant will be expected to perform the comparison of implementation models.

2.2.5. Planning, Organizing, Project Management, Leadership

While the extent of project management required of the Consulting Firm is not completely known, the selected resources should be prepared to provide expert project management and leadership skills – both formal and informal – on any aspect of the project. All the Consultants staffed on the project will be expected to be highly competent in organizing work and deliverables, logically planning steps of action required for major or minor activities, assuming leadership in any situation requiring it, and working with little guidance or direction. The Consultants also should be well versed in creating formal project plans using MS Project or other tools and in managing a project to those plans.

Managing to the plan may include assigning and delegating to the right resources, effectively tracking time and deliverables and assuring this is communicated to all stakeholders on a regular basis, and adjusting the plan as needed when conditions change.

3. Proposed Approach for the Project

This section addresses item (f) of the RFP Section 3.7.1 requirement – “Provide a narrative that explains and illustrates the firm’s concepts for this project as referenced in section 3.5.”

3.1. Approach Overview

In general, based on our experience with large, enterprise-level software development or COTS (Commercial Off-the-Shelf) selection and integration projects, eBridge recommends a methodology/approach that assures the highest quality of deliverables in the most critical phases of such projects – (1) Requirements Gathering & Analysis, and (2) Prototyping (*and/or Proof of Concept development*). Unlike pure software development projects, projects that focus on acquisition and implementation of COTS software products start with the assumption that the selected package will meet a high percentage of the business & technical needs of the business. Therefore, the key success factors of implementing such software packages are:

- *The degree to which the software can easily be configured to meet the needed business processes*
- *The flexibility of the software to adapt easily to future business process and/or business rule changes*
- *The ability of the software to easily interface with both in-house Legacy systems and any external suppliers or business partners*
- *Value – business benefits for the cost; ROI*
- *The degree to which the software utilizes industry-standard methods*

With this in mind, eBridge recommends an approach that weights the project heavily on the following major activities:

- *A very thorough and accurate effort to document and understand the relevant Business Processes and Business Rules*
- *An accurate and thorough understanding of the business data used by the business and the key questions that must be answered on a regular or ad-hoc basis from reports and operational analysis dashboards*
- *An understanding of the mandatory and highest priority needs and requirements versus those that can be worked around if necessary. Such systems are almost always implemented in stages/phases, and thus there is a period of time when the legacy system and the COTS system may have to co-exist or a certain functional aspect of the new system may have to be performed by the business using other means.*
- *A very thorough understanding of the out-of-the-box capabilities of the COTS product and whether certain features can be easily adapted to the business’ mandatory business needs/requirements.*

The approach involves a very thorough and accurate gathering of information at a variety of levels regarding both the internals of the business operations and needs and the specific capabilities of the group of potential COTS packages. The information gathering should be both top down and bottom up, but instead of gathering the entire breadth of information at once, the top-down and bottom-up information gathering should be focused in certain areas of interest/criticality first. A continual effort must be made to separate mandatory, highest level

requirements from ones that are highly important. The method(s) described above have been successfully utilized by eBridge consultants on multiple, large scale projects – examples are provided in the sections below on eBridge Qualifications and eBridge Experience.

3.2. Vendor/Product Selection Methodology

For COTS selection projects, eBridge utilizes a comprehensive Request For Information (RFI) template which can be tailored to any unique needs of the client. Following is the basic list of sections of information we require each vendor to complete regarding their product(s).

2 Background Information

- 1 Company Overview
- 2 Project Overview

3 Vendor and Application Profile

- 1 Vendor Background
- 2 Product Background
- 3 Implementation History
- 4 Vision / Strategy
- 5 Implementation Time Frame
- 6 Implementation/Integration Support
- 7 Training
- 8 Software Release Strategies
- 9 Software Version and Releases
- 10 Software Support

4 Technical Requirements

- 1 Technical Architecture
 - 1.1 Scalability
 - 1.2 Performance
- 2 Integration
 - 2.1 Interfaces
- 3 Application Architecture
 - 3.1 Customization
 - 3.2 Batch Processing
 - 3.3 Web / Portal Support
 - 3.4 Security
 - 3.5 User Help
- 4 Database Architecture
 - 4.1 Data Conversion
 - 4.2 Data Analysis
 - 4.3 Reporting
 - 4.4 Data Archival

5 Functional Requirements

- 1 Functional Overview
- 2 Functional Requirements
 - 2.1 General Application
 - 2.2 Data Model

- 3 Functional Requirements Matrix
 - 4 Other Functional Capabilities
- 6 **Section VI - Cost Estimate**
- 1 Cost Estimate Summary
 - 2 Support Rates
 - 3 Pricing Model

Additionally, eBridge has a set of detailed scoring templates used to evaluate both the vendors and their products in a wide breadth of key areas. We have successfully used our RFI and evaluation templates and methodology on numerous engagements.

3.3. Methodology – *Unique Aspects of COTS Projects*

In general, this project will differ from standard software development projects in the following ways. The eBridge methodology/approach addresses these differences.

- *Actual software design and development efforts shift to COTS package configuration and system interface design and development.*
- *Flexibility/Adaptability focus – Special emphasis is placed on proving how the software can adapt to changing business needs, i.e., how easy is it to re-configure the COTS software as business processes, products or rules change.*
- *Pure requirements gathering is augmented by analysis and documentation of COTS package capabilities.*
- *Architecture and Design Validation – Instead of waiting until the first parts of the Design and Construction phases, COTS product vendors “prove” their architectures and designs by live demos and actual working proofs of concept tailored to the client environment.*
- *Vendor negotiation – Significant effort/time is spent working with COTS product vendors to negotiate costs, support, professional services, feature customization, etc.*

3.4. Common Issues of COTS Projects

There are some common issues that can be expected of these kinds of projects. Note that Section 4 below details some of those common themes and explains how eBridge has handled those on past projects and how they can be mitigated. Our methodology includes processes and steps that help to alleviate many of these problems.

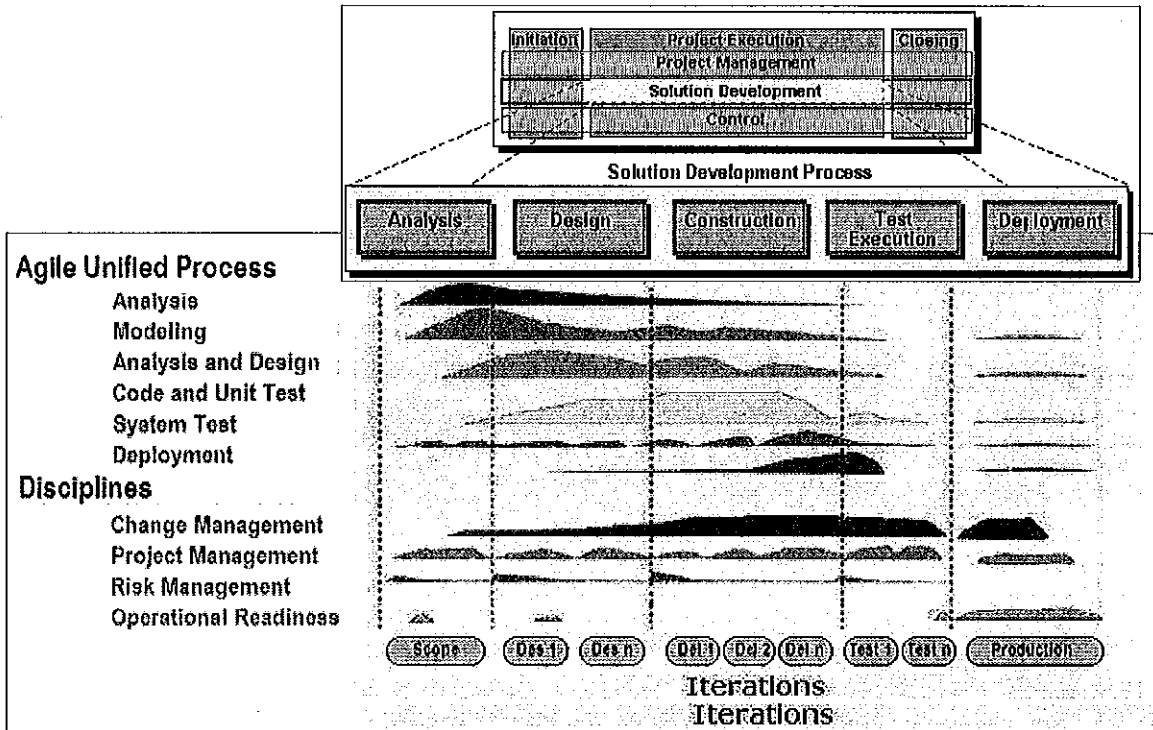
3.5. Recommended Methodology

The eBridge methodology is a combination of the best of several industry methodologies with an emphasis on effective requirements gathering and thorough specification of the Request for Information documents which will be distributed to the vendors. eBridge also utilizes a comprehensive “scoring” method to evaluate each vendor’s product against the weighted requirements.

3.5.1. Iterative and Incremental Methods

We understand that during the requirements process, omissions and unclear requests/requirements are common. Our iterative approach to analysis helps to surface these issues early on in the process.

The diagram below gives a clear visual of the concept of incremental and iterative development. It is an adaptation of the Rational Unified Process – the Agile Unified Process.



Agile Unified Process

3.5.2. Early Use of Parallel Workstreams

For large projects, especially those involving integration of COTS products into the company, it is imperative to get a large body of knowledge collected at the earliest timeframe in the project. For a major enterprise-level software replacement or rewrite effort, the risk is higher due to the volume of change and the impact to such a large user community. There is a huge amount of business, functional and technical details to understand and solidify.

Because this project involves a wide span of types of information to be collected, we recommend an approach of many parallel efforts during the analysis phase to gather as

much information about each relevant area of concern as soon as possible. This includes some top-down and some bottom-up analysis and documentation. This should facilitate early cross referencing of information to surface questions, gaps or issues about the requirements.

3.5.3. Requirements and Analysis Weighting; Process Focus

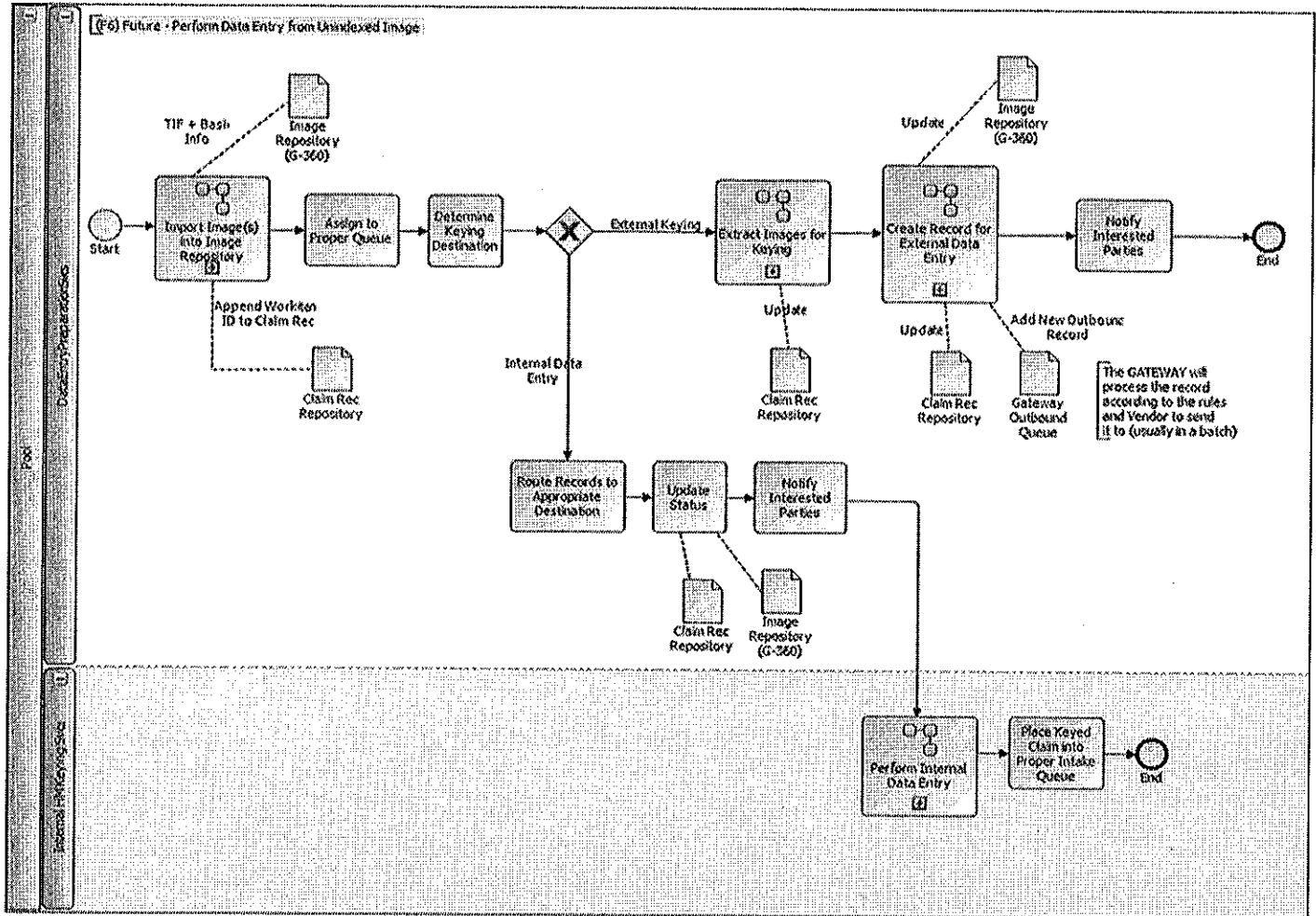
The eBridge approach maximizes the validity of the work products from the Analysis phase.

Our requirements and analysis methodology uses models and diagrams to document concepts and "facts" about the existing systems and functions. We've seen consistently how these models help both the Business and IT reach a common understanding of what is in place, what is being requested, and what the future solution might look like.

For projects like these, we also place an emphasis on the actual operations of the business using process and value stream diagrams as well as Use to elicit the best information regarding the needs, goals and requirements of the Business users.

We model business processes at various levels of detail depending on priorities, and then further detail as well as business rules can be elicited using Use Cases. eBridge has experience developing Business Architecture artifacts such as business process diagrams with a large variety of BPMN compliant tools as well as more informal modeling tools (Visio, PowerPoint).

Below is an example of one of the types of diagrams we utilize during the Requirements and Analysis phase.



Sample BPMN Compliant Business Process Diagram

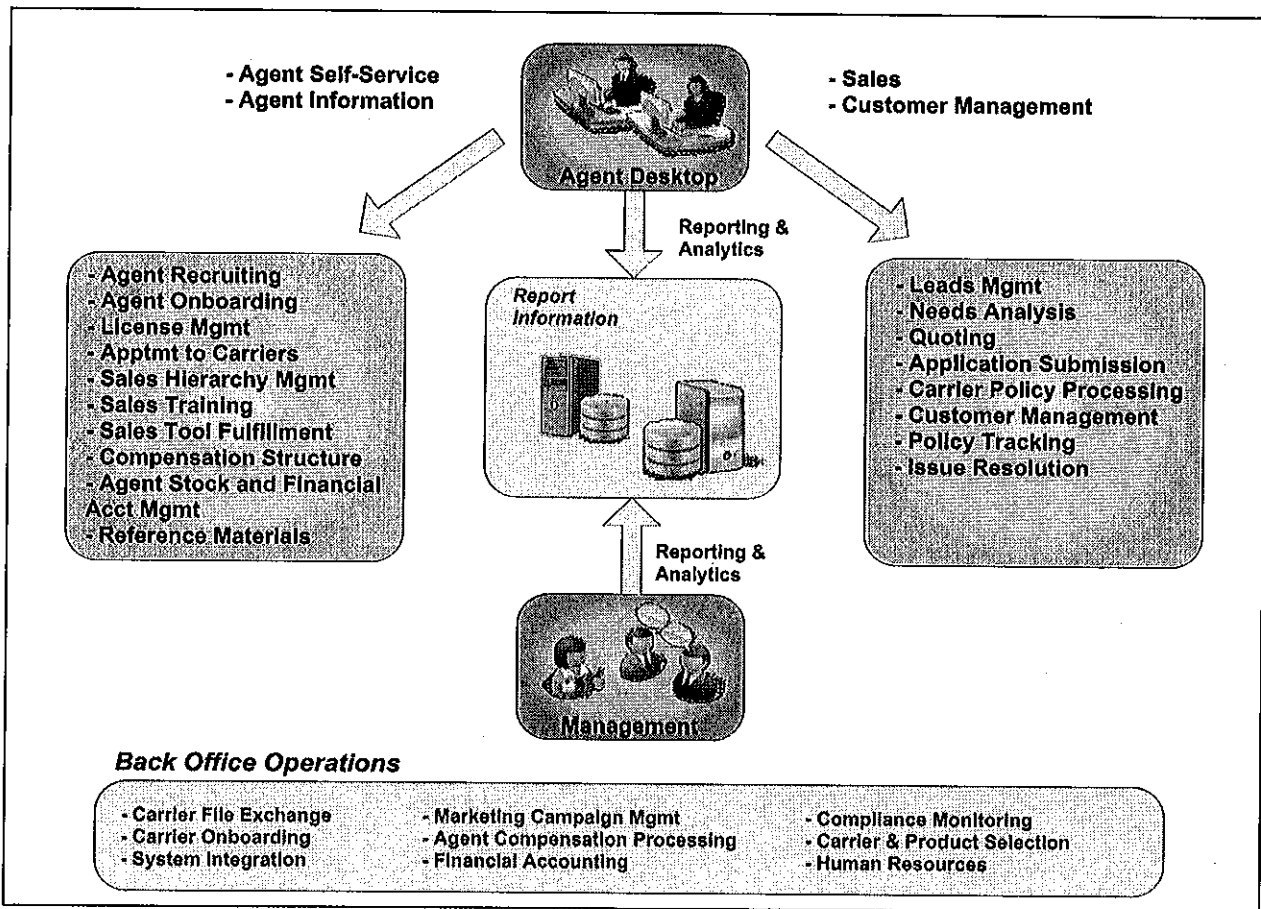
3.5.4. Visual Communication – Continuous Modeling

One of the biggest lessons learned from our consulting engagements has been in the area of team communication. The larger the project the harder it is to keep everyone in sync with latest decisions, changes or designs. It is easy on large, fast moving projects for several

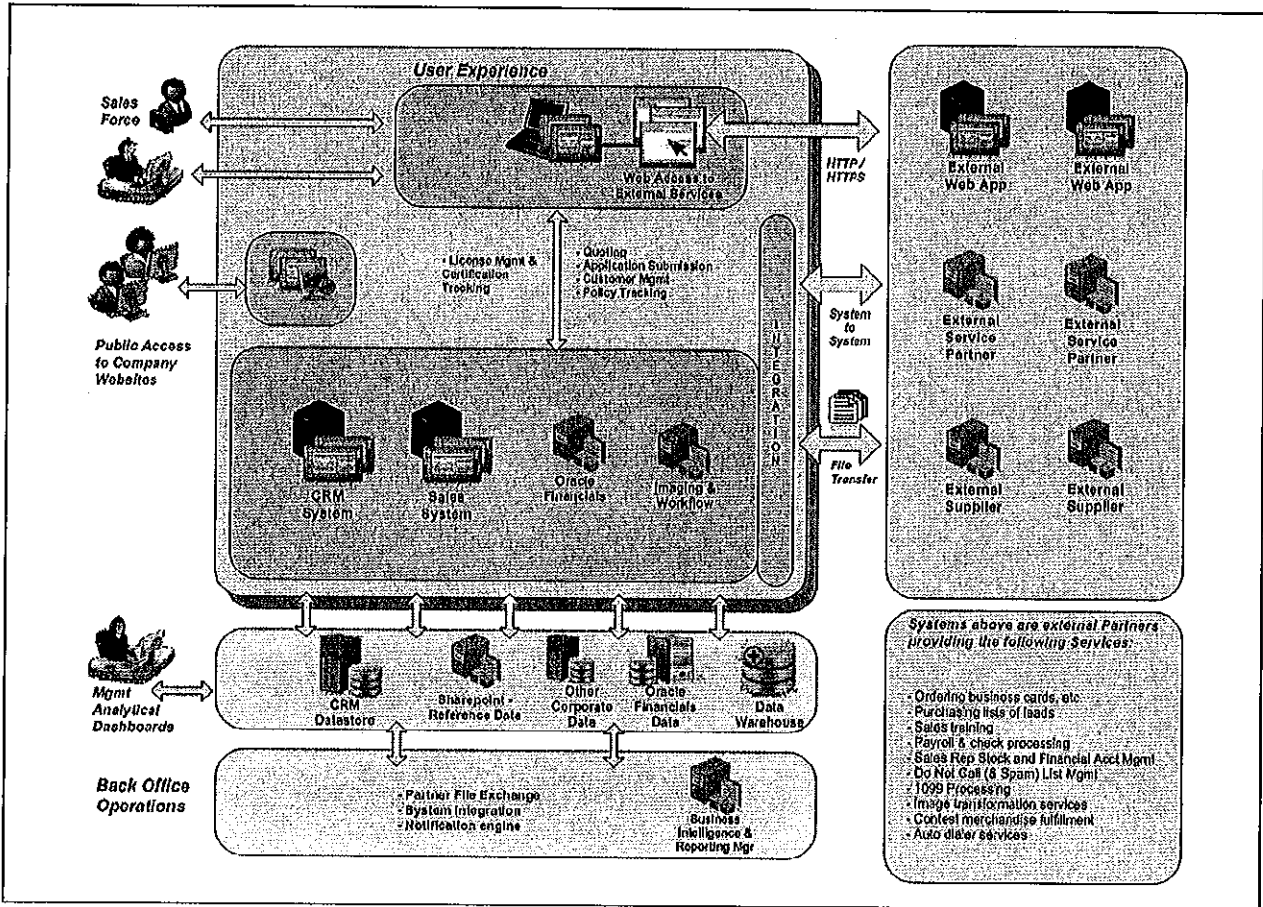
team members to have widely varying understandings of certain "facts" about the project, the new system, or a deliverable.

To minimize this, we recommend an architectural presence early on in the project to develop and maintain key visual artifacts about the system(s) being considered. The architectural artifacts become the definitive record of the most recent decisions and answers, and the visual aspect of them simplifies communication to all levels of the Business, IT and COTS vendor teams. Our methodology specifies a variety of architectural artifacts that can be developed and maintained as well as the processes for keeping them accurate and communicating to the team(s).

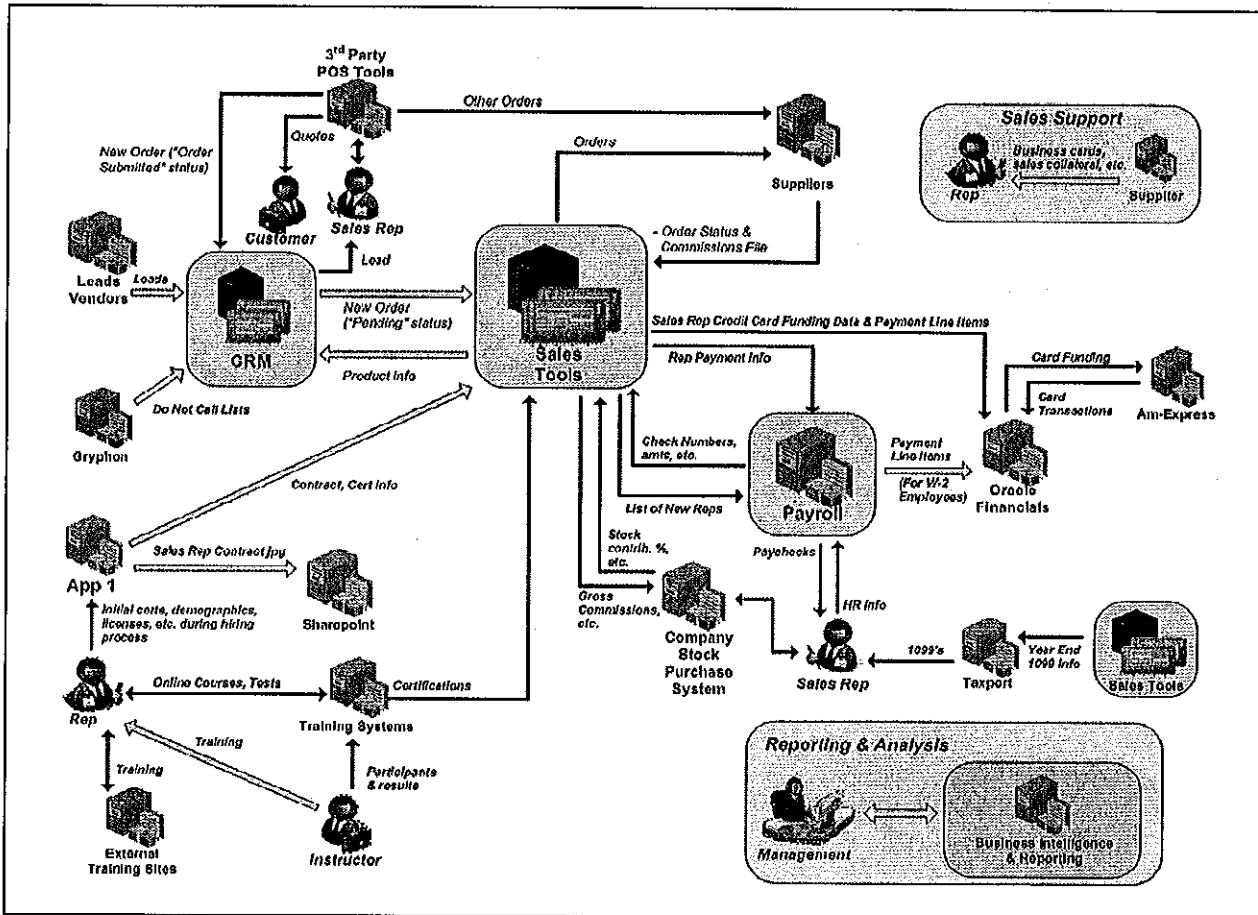
Shown below are three such artifacts that were developed and utilized successfully on one of our latest engagements involving a large array of COTS tools implemented simultaneously for a start-up subsidiary of a major insurance company.



Sample System Functionality Overview Diagram



Sample Systems Overview Diagram



Sample Systems Interaction Diagram

3.5.5. Heavy Use of Proofs of Concept & Prototyping

It is difficult to sort the facts from fiction when it comes to evaluating software products on the market today. For the smaller software products, vendors have started allowing downloads of trial versions of their products so a potential buyer can actually use the software for themselves to get the facts. For a complex, enterprise level system, this isn't feasible.

Instead, we have been involved with several projects over the past few years that have required the software vendors to produce a small working "application" with their software after the client has provided specific requirements to the vendors for what the working proof of concept must include. The results of these exercises are invaluable and very telling of what you can expect from each vendor.

Some specific examples are explained below in Sections 5 and 6. eBridge assisted the clients in developing the proofs of concept requirements, working with the vendors to clarify and plan the efforts, participate in the sessions, and evaluate and select the best solution for the clients. The projects included major offerings from Oracle, IBM, Tibco, Perot Systems and other major COTS vendors.

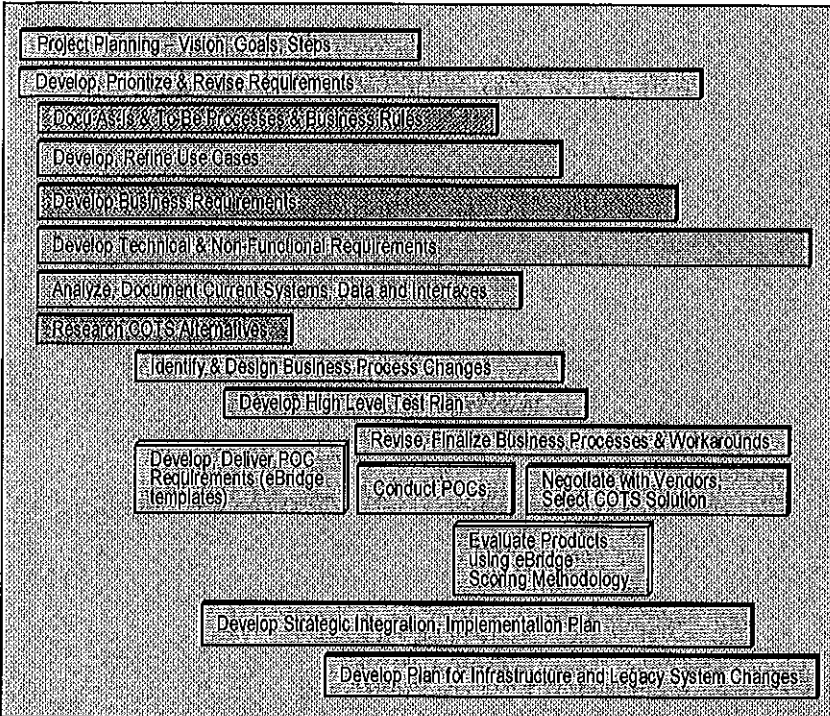
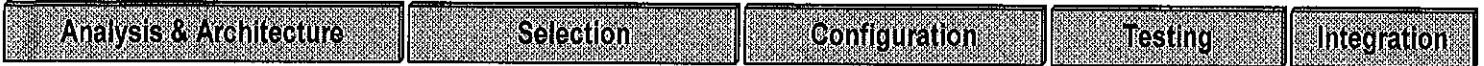
3.5.6. Agile Methods

Our methodology allows for use of the most pragmatic methods and artifacts for the particular client and project. Our consultants are well versed in the use of many simple and complex toolsets for use in the entire Systems Development Lifecycle, and we rely on the vision of the client plus our experiences and industry best practices to determine the specific tools to use for each engagement. Furthermore, we believe in using lightweight deliverables where possible if the concepts and information can be conveyed effectively without bulky, length artifacts. We have experience following the Rational Unified Process (RUP) processes and deliverables as defined in the methodology, and conversely we have experience using some of the most simple and minimalistic artifacts and deliverables for software analysis and design. Based on the engagement and client, we pull pieces from these two extremes to craft the right set of artifacts to develop and the best development process for that effort.

3.6. Methodology Template/Blueprint

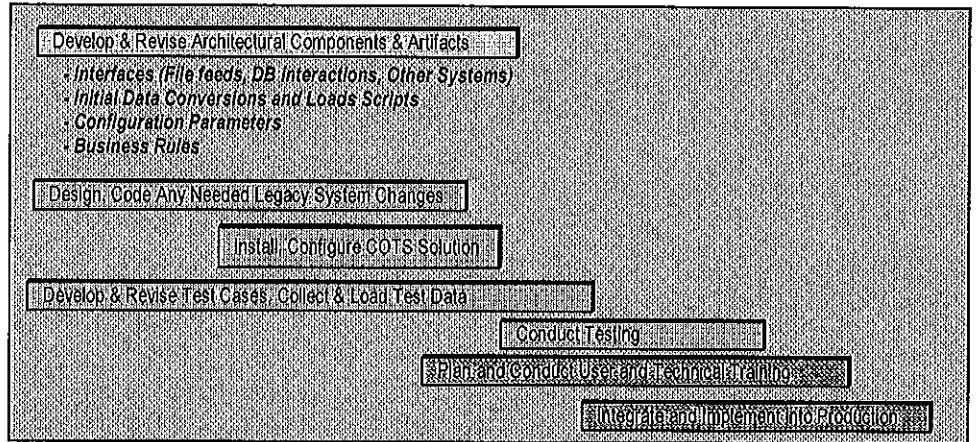
The diagram below summarizes visually the phases and flow of eBridge's methodology. This is our main "template" that is used as a starting point and then adapted as necessary (the process itself and the deliverables) to assure the project is conducted in a manner that meets the client expectations and provides the most benefit to the team(s) involved.

eBridge COTS Project Methodology



eBridge Focus

System Integrator & State IT Team Focus



4. Common Challenges of Similar Projects

This section addresses item (g) of the RFP Section 3.7.1 requirement – “Describe any significant problems encountered by the firm in other ERP system projects, explain issues and problem resolution and how those problems may be avoided on this project.”

4.1. COTS Vendor Claims vs. Product Capabilities

4.1.1. Issue

From conversations and reading specifications of a product, it is still hard to know if the package will truly meet the requirements of the users. Companies also have some unique needs that will require customizing the vendor product, and there are questions about how the package will actually be able to do this.

4.1.2. Mitigation

Based on our recent experience with three such enterprise-level projects, eBridge has effectively addressed this issue by bringing in each of the vendors for a small proof of concept project. While it does take extra effort to set up the running environment, to get the right people involved, and to develop the specific requirements for the vendors to follow, it does provide a high degree of validation. Such proofs of concept can include demonstration of functionality, report creation, user interface modification, business rule adjustments, file interface configuration, performance, etc.

4.2. COTS Product Configuration Takes Longer Than Expected

4.2.1. Issue

By virtue of the fact that you are purchasing, not building, a system, there is an assumption that simply configuring that off the shelf package should be fairly simple and quick. Clients are surprised when vendors provide the figures on what their professional services will cost to help configure and integrate their products. Even the IT/technical staff tends to underestimate the effort to configure the system.

4.2.2. Mitigation

There are two areas to concentrate on to mitigate this issue. (1) The proof of concept must include a good selection of tasks related to configuring the COTS software. Instead of the vendor “coding” the POC ahead of time, working hands-on with the vendor’s POC helps to get the true picture of how to estimate the configuration phase of the project. (2) Good, thorough analysis and documentation early on in the project will help identify all the areas where the COTS product will need to be configured to accomplish what your legacy system is doing. This information is then used to understand how the COTS systems perform those functions.

4.3. Client Underestimates Time and Effort to Pre-Load Data

4.3.1. Issue

There is always a data conversion effort when one legacy system is being replaced by another. This includes customer information, product and service information, historical transaction information, reference table information, etc. Clients often underestimate the amount of due diligence required.

4.3.2. Mitigation

The planning for this task must begin at the very beginning of the project during current system analysis. Architecturally, information must be gathered about not only the data and file structures, but also the systems that move that data around and the business rules associated with it. Often overlooked are the exception rules – how the data is handled when it doesn't conform to the expectation. We suggest a Data Architect be assigned early on in the project to not only assure the as-is landscape is fully understood and documented, but also to participate with the COTS product analysis and POC phases for asking the right questions of the vendors. Data Architects also understand high volume transaction processing and data storage issues. This is another key area for questioning the vendors and getting them to prove how their system handles your transactional and data needs.

4.4. System and File Interfaces Cause Issues

4.4.1. Issue

The COTS product often needs to interface with quite a few internal systems and also with external business partners and/or suppliers. Any unique requirements regarding the interfaces or the exception handling rules for these interfaces needs to be surfaced early and discussed with the vendors.

4.4.2. Mitigation

It is important to get someone who knows the interface "code" and processes to document the interfaces, the rules, the processes and the exception handling steps currently in place. If XML is involved, the schemas and XSD's should be readily available and understood. Transformation rules are especially critical to understand and document. This information should be used in discussions with the vendors so a valid picture can be drawn of how their product will "replace" the infrastructure in place currently.

4.5. Business Process & Rules Documentation

4.5.1. Issue

It is often difficult to get accurate information about the business operations and business processes (and associated rules) of the company. There may be little documentation and only one or two users who know how things really work or what business rules are used. Since COTS ERP systems utilize process flows and business rules, it's important to get an accurate picture of the as-is and to-be processes and rules.

4.5.2. Mitigation

- (1) Document processes visually. Utilize a formal process modeling toolset if possible.
- (2) It is important to assign process owners to key business processes.
- (3) Keep the process models continually up to date as new information is surfaced. The process owner helps by being the approval point for all changes.

4.6. Single Record of “The Current Truth”

4.6.1. Issue

Very large projects with a divide and conquer approach have the tendency to enable separate teams to get “out of sync” with others. Everyone is moving fast, a lot of information and questions are being sent and received, decisions are being made, and it is hard to assure that everyone has the latest information and view of current “truth” about the systems and architecture. As a result, documentation is duplicated and tasks are undertaken that don’t need to be.

4.6.2. Mitigation

Place the responsibility for all the architectural information and diagrams with the architect(s) of the project and assure that all the teams use the same repository of information at all times. Artifacts are versioned, notifications are sent with major changes, etc. Architects interact with key team members daily in order to keep the “big picture” accurate and make sure each team has the same “big picture” of current decisions and direction of the project. This centralized, common view of the system(s) is used at business meetings, vendor meetings and IT meetings. If issues arise, key leads get together and clarify and the diagrams are modified if necessary to reflect the decisions.

5. Methodology for Retention

This section addresses item (h) of the RFP Section 3.7.1 requirement – “Describe your firm’s approach and methodology for retaining a stable consulting staff throughout the contract duration for this project.”

For such enterprise level projects, eBridge utilizes our most experienced consultants who have each been with our firm for more than five years. Each not only has a solid track record with eBridge, but also a history of stability at each company they have worked for prior to joining eBridge.

eBridge hires self-starters, consultants who are motivated by challenge and knowledge growth, and consultants who have consistently demonstrated leadership and dedication to the firm and to our clients. Our Senior Consultants each have an average of more than 20 years experience in the Information Technology field, and each has worked for and consulted in large private and public sector environments.

Each of our consultants is expected to continually grow their technical and business knowledge by reading, gaining certifications, and learning from each engagement. The eBridge hiring process assures that we bring in only those consultants who are committed to continual self improvement and learning. eBridge also provides formal training and certification opportunities to our consultants, and the culture of the firm is one of mentoring and cross-training our consultants through the sharing of experiences and expertise among the team.

eBridge has a formal bonus payment structure that rewards our employees for personal performance, company performance and stability.

6. eBridge Profile and Qualifications

6.1. Company Profile

1. Organization's legal name, address, company federal taxpayer identification number, and primary contact names, titles and contact information:

eBridge Consulting, LLC (tax id: 75-2879412)

Primary contact:

Bill Varney

Founder and CEO

1235 S. Main Street (Ste. 252)

Grapevine, TX 76051

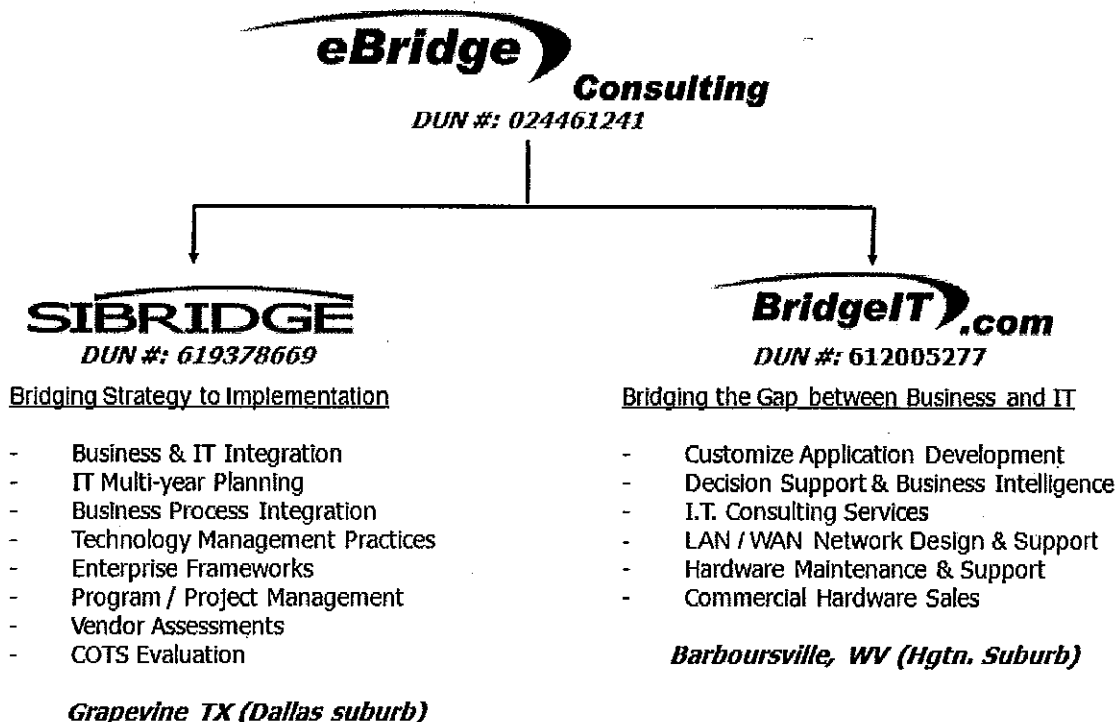
817-756-6239 (desk)

817-800-8005 (mobile)

2. Please provide the firm's most recent audited financial statement and DUNS number.

See Appendix A

3. Firm's organizational structure:

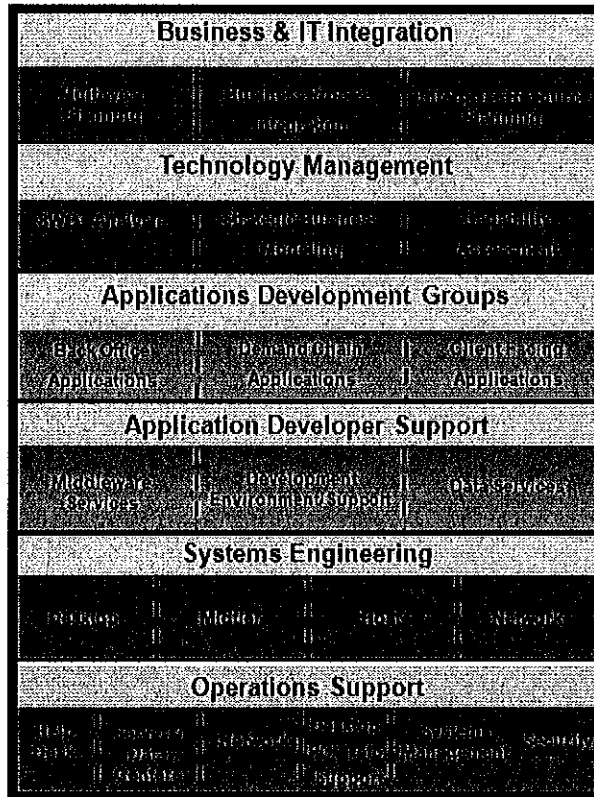


Bill Varney (Founder and CEO) bill.varney@sibridge.com

- **Stewart Varney (President) - stewart.varney@bridgeit.com**
- **Ryan Blake (Business Development) - ryan.blake@bridgeit.com**
- **Jim Tully – (Principal, Technology Adoption and Delivery Practice) - jim.tully@sibridge.com**
- **Paul Park (Principal, Enterprise Architecture Practice) - paul.park@sibridge.com**
- **Van Dorsey (Principal Architect, Enterprise Architecture Realization) - van.dorsey@sibridge.com**

4. eBridge Capability Model

Strategy & Planning



Tactical & Operational

5. Company's corporate history. Indicate your core businesses, products, services, and markets.

Core business: Technology Consulting

Products: we are technology (product) agnostic by design so as maintain objectivity during vendor selection processes.

Services:

**Transformation
Alignment
Integration
COTS Product Selection & Integration
Optimization
Markets
Continental US**

6. The firm's client base:

eBridge has a solid list of Fortune 1000 clients and public sector clients who are 100% referenceable. The list includes the following:

- **State of West Virginia**
- **City of Charlotte, NC**
- **YRC Worldwide**
- **Cisco Systems**
- **Dollar Thrifty Automotive Group**
- **Celanese**
- **PricewaterhouseCoopers (PwC)**
- **Sprint Nextel**
- **Verizon**
- **TXU**
- **H&R Block**
- **HealthMarkets**

Business Process Modeling Ability

The majority of eBridge consultants have more than 10 years of experience focusing extensively on Business Process Analysis and Business Process Modeling. Working with a variety of industry standard toolsets (Casewise, Tibco Business Studio, ProVision Workbench, Sparx Enterprise Architect, Visio Professional, etc.), our consultants allow the advantages of immediate return of investments to our clients.

As most of our consultants come from an IT/Systems Development background at Fortune 100 companies, solid analysis skills were learned from formal professional training and seminars, and that knowledge was extended from utilizing those foundational concepts on numerous large and small projects.

Additionally, eBridge has significant experience taking Business Processes and transforming the processes into automated workflow diagrams that can run in a variety of workflow engines. Most Enterprise Resource Planning (ERP) packages today include some sort of internal workflow mechanism, and modeling current and to-be processes effectively is a huge benefit in later configuring an ERP package to orchestrate business processes as needed.

6.2. Qualifications

Since 2000, eBridge has been providing clients with senior level consultants to assist in both business and IT re-engineering efforts. Our engagements include the following:

- Shifts in our client's technology infrastructure – replacing legacy systems, integrating new systems into the existing systems portfolio, inserting middleware layers into the infrastructure, or leading major system redesign/re-write efforts.
- Enabling business processes by transforming to a SOA environment. Our expertise is in helping the client articulate their vision and goals, developing comprehensive requirements, and assessing technology options.
- Developing Enterprise Architecture roadmaps for transitioning from the current state to the future state, plan the program and projects, and lead the transformation effort following the roadmap.

Following are some examples of the types of projects our consultants have been involved with related to enterprise level software evaluation, selection and integration:

- *Multiple RFI/RFP/Vendor selection for the Target State ERP system. Managed the evaluation process for Peoplesoft (incumbent) versus SAP and Oracle Financials for the target state environment for ERP for the client. Created, maintained and organized the scoring of the multiple systems including the business case for the final selection.*
- *Selection and implementation of an enterprise-strength middleware/messaging system. Requirements development, product and vendor research and RFP development were followed by in-house proofs of concept by Oracle, IBM and Tibco.*
- *Design, planning and evaluation of systems impacted for multiple releases of Peoplesoft Financials for GL, AR, and AP modules.*
- *Evaluation of appropriate Peoplesoft Financials modules to use for a consolidated company formed through a merger.*
- *Systems analysis and architecting – Cash to GL processes for telecommunications provider*
- *Conversion to an SAP ERP system and integration of legacy billing systems to the SAP financial GL module*
- *Project management and architecture leadership of the evaluation of SAP versus Peoplesoft through a pointed RFP type scoring methodology*
- *Requirements development, business case development, and selection of ERP systems. Integrated Kanban processes into the environment.*
- *Configuration of ERP systems as well as planning and implementing conversion/migration efforts*

Business Process Modeling Ability

The majority of eBridge consultants each have more than 10 years of experience focusing extensively on Business Process Analysis and Business Process Modeling. Working with a variety of industry standard toolsets (Casewise, Tibco Business Studio, ProVision Workbench, Sparx Enterprise Architect, Visio Professional, etc.), our consultants allow the advantages of immediate return of investments to our clients.

As most of the consultants came from an IT/Systems Development background at Fortune 100 companies, solid analysis skills were learned from formal professional training and seminars, and that knowledge was extended from utilizing those foundational concepts on numerous large and small projects. Additionally, eBridge has significant experience taking Business Processes and transforming the processes into automated workflow diagrams that can run in a variety of workflow engines. Most Enterprise Resource Planning (ERP) packages today include some sort of internal workflow mechanism, and modeling current and to-be processes effectively is a huge benefit in later configuring an ERP package to orchestrate business processes as needed.

7. eBridge Experience

Since 2000, eBridge has been instrumental in helping organizations improve and enable business processes through better use of technology. The practice of inserting or adopting new technology in an existing business ecosystem is an expensive and challenging activity. This is especially true for integration frameworks. Based on our deep expertise and our extensive experience over long-running and high-value integration programs, eBridge is excited to share the following reference engagements.

To be sure, no one person ever lands a technology under their own power. Based on this understanding, eBridge has provided six reference engagements that clearly demonstrate our ability to own an investment entirely, to join an existing team seamlessly, or to simply provide mentorship and subject matter expertise in the integration space.

Cisco

eBridge provided Cisco with the resources to assist in selection of a vendor software package to replace their in-house Service Delivery & Service Management portal and back office system. The project involved gathering detailed requirements from Cisco users, understanding the ITIL service processes requiring system enablement, analyzing the various systems used in the legacy environment, and developing a set of technical and functional requirements to provide to the primary COTS vendor for a formal proof of concept effort.

eBridge assisted in conducting the proof of concept, evaluating results against business and technical requirements, and providing the recommendation to purchase the product.

Insphere (A subsidiary of HealthMarkets)

As a new start-up subsidiary of HealthMarkets, the vision for Insphere was to create the systems infrastructure from scratch using mainly COTS products and external service partners that could provide web-enabled services for many of the business processes. The final make-up of the systems infrastructure consisted of more than 20 external applications/partners interfacing with 12 internal systems. Of the 12 internal systems, four were COTS packages (MS CRM, VUE, SharePoint, Global-360 Imaging) and the remaining 8 were custom in-house developed programs. eBridge senior consultants were brought in to help architect the infrastructure and focus on the overall integration and interfaces of the complex mix of applications.

eBridge focused on mapping applications to the business process flows, documenting the necessary data flows and status changes involved in the system interactions, and identifying gaps where interfaces required enhancing. From the highest level architectural diagrams to the low level process and value stream diagrams, these artifacts were used to continually keep the separate teams aware of the current state of design, and they were used to keep upper management and stakeholders apprised of current decisions and planned operational flows.

eBridge also lead the effort to develop the security and single-signon (SSO) architecture which was a critical aspect of integrating such a complex mix of internal and external applications.

Yellow Roadway Corporation Worldwide

eBridge partnered with Yellow Roadway architecture team over 18 months to design and implement a foundational integration infrastructure for much of the organization's transaction activity. The breadth of this engagement included alignment of divisional strategy and the development of standards, patterns, canonical data models, technical reference models and operational specifications guide. After a lengthy platform due diligence, eBridge led development teams in the initial implementation iterations of WebMethods and its many tools, and IBM Websphere process server.

Securus

eBridge partnered with Securus Technologies, over 36 months, to deliver an integrated software based telephony system based on SIP/SOA platforms. eBridge led this effort, which now drives over 70% of the firm's revenue, from strategy through implementation and several follow-on iterations.

The breadth of this engagement included alignment of divisional strategy and the development of standards, patterns, canonical data models, technical reference models and operational specifications guide. Using Ubiquity's SIP based development platform, and both BEA and Sun integration platform, eBridge implemented a highly integrated infrastructure that enabled SIP telephony calls to interact with software applications during the telephone call. This system is considered highly transactional and extremely chatty; SIP and SOA traffic combined created an extremely complicated architecture to support.

In follow-on efforts over the last 12 months of this engagement, eBridge provided development and test resources responsible for this platform, its services and associated applications that were to be integrated through this infrastructure.

BellSouth

eBridge resources engaged with BellSouth as Subject Matter Experts and Architects to complete the design and implementation of its integration infrastructure, focusing on the transition from design to deployment. This engagement included the authoring of standards and patterns, integration specifications, operations specifications, and integration frameworks.

TransAmerica

eBridge resources engaged with Transamerica Long Term Care, which has made significant investments in infrastructure supporting Service Oriented Architecture (SOA), to provide guidelines and structure for developing applications. In order to help this organization shift to an Agile team methodology, eBridge developed an Architecture for Web Applications providing the technical architecture and governance framework required by the IT development teams, and transitioned ownership of this framework to the internal Architecture Affinity Group.

Dollar Thrifty

eBridge resources engaged with Dollar Thrifty, as members of its Architecture team, to help adopt emerging technologies. As a part of this overall initiative, eBridge has provided its integration expertise as Dollar Thrifty is making the shift to Service Orientation. An Auto Rental company, Dollar Thrifty has struggled to put in its integration framework, and is using eBridge

as a Subject Matter Expert to develop its integration framework, reference architectures, BIZ Talk framework, its operationally focused services, and its initial round of business services.

PricewaterhouseCoopers L.L.P. (PwC)

PricewaterhouseCoopers contracted with eBridge to provide needed analysis and Business Process re-engineering services to dramatically improve the operational effectiveness of certain back-office systems. Two other consulting companies had previously been used by PwC to create the improvement roadmap; however, neither had provided the practical and effective solution PwC was looking for.

PwC leadership needed to re-engineer the internal business processes for supporting their front line Tax, Advisory and Audit revenue generating practices. PwC initiated a companywide Shared Services Redesign (SSR) effort focused on the improvement of back-office systems supporting Human Resources, Payroll, Accounts Receivables/Payables, etc. PwC had utilized their own group of Six Sigma Black Belt staff to analyze the current state and recommend the best solution. However, the expected process and organizational redesign had not yielded results. PwC Leadership needed positive results and turned to eBridge to drive the effort to a successful end state.

eBridge designed and implemented a hybrid approach using many of the best practices of Business and Process Architecture. Using Business Architecture standards, the SSR results were mapped directly back to each organization's strategies, goals and initiatives.

Engagement Results:

- eBridge was able to evaluate, discard, and re-utilize tools and methods of the previous SSR waves to ultimately create the most effective methodology for the final SSR wave.
- By employing a process-centric methodology, decisions based on direct impact to SSR goals were met leading to near-seamless transition of services to PwC's frontline business units.
- Management controls and metrics were deployed via process control points to measure effectiveness and impacts to PwC strategies, objectives and goals.
- The repeatable methodology created by eBridge was adopted for future SSR efforts within PwC.

Sycamore Networks (formerly Eastern Research, Inc. (ERI))

Leadership Team Assessment and Reorganization - eBridge was brought in by the CEO of Sycamore Networks to help determine what was needed to achieve his most important objective for the company. The objective would require major effort by the entire leadership team, and the team needed to be capable and motivated. While the main goal of the company was to dramatically improve the quality and reliability of their products, a major underlying need/goal was to assure the leadership team was positioned appropriately to affect the needed changes.

eBridge first spent time with the CEO to understand the organization and the vision of the CEO and owners. A large value eBridge provided to the CEO was our ability to spur thoughts he was unable to easily surface and to explain to him our knowledge of other companies we had worked with which had similar issues. eBridge then documented the formal Mission, Vision, Issues and Goals of the CEO and owners.

The assessment phase consisted of extensive one-on-one interviews with all the Vice Presidents of the organization as well as some of the key Directors. Questions and discussions were structured to elicit details on each leader's vision, creativity, leadership style, delegation ability, planning and organizing skills, attention to detail, and ability to adapt to changing times. Additionally, we observed their responses as well as responses from their peers on how effectively each was perceived to work in a team environment. Finally, eBridge documented the CEO's understanding and expectations for each area of the business as well as the viewpoints of what each executive explained their responsibilities and the department functions to be.

In summary, with the key information gathered from the executive interviews and organizational analysis, eBridge recommended and helped the client organize his leadership team more effectively - several Vice Presidents were reassigned to roles they more appropriately fit, and formal mentoring was conducted to add needed skills to the team.

Quality Improvement in Product Development - In parallel to the above activities, eBridge started the process of reviewing the highest level core processes of the organization, focusing mainly on the manufacturing of new products. Because time to market and quality were two of the major issues of concern, the product development lifecycle became the focus of initial understanding and documentation.

eBridge facilitated process review sessions, helped the team pinpoint root causes of poor quality, and architected the re-engineered product development lifecycle in Casewise. Industry standard artifacts were added to the lifecycle, and eBridge mentored the team on process modeling and Lean Six Sigma root cause analysis techniques. The newly re-engineered product development lifecycle was placed into production and utilized on the next major project.

To assure that the changes remained effective and the planned action steps were followed, eBridge helped the client establish a formal Project Management Office (PMO), assisted in hiring the staff, and then mentored the team in their roles in the end-to-end Product Development process. eBridge also helped the management team define specific metrics and KPIs for each sub-process and then assisted the client with establishing collection methods and a formal repository of information to report on at monthly and quarterly meetings.

Project Management – A final part of the engagement involved the need for a much more disciplined method of managing major projects. A pivotal new product was almost a year behind schedule with significant issues left to resolve.

After a complete review of the schedule and past plans and an assessment of the product development process and teams involved in the process, eBridge provided the following findings to the CEO:

- *The project plan originally developed had omitted numerous critical steps and checkpoints*
- *The plan had not been effectively reviewed and bought into by all affected parties*
- *There was a lack of any type of tracking of time against original estimates*
- *The plan was not being followed and monitored on a weekly basis, so original milestones and future steps had not been adjusted to show the true picture of the current state of the project*
- *The Project Manager was allowing numerous revisions to the original set of requirements, however, the impact to the project plan steps and schedule was not being planned or reported on*

- *Tight communication on a weekly basis between all teams involved was not taking place to discuss issues and ramifications of decisions being made. Different departments were acting in a silo and only one team was concerned with the overall project plan.*

After discussing the findings with the CEO and his leadership team, eBridge recommended the corrective steps to get the project on track, and eBridge provided a Project Manager who mentored the team and got the project under control. The following actions were taken and the project was implemented with high quality and on time.

- *Assigned the current Project Manager to another role and utilized an experienced eBridge Project Manager to take over full control of the project planning and management*
- *Utilized an existing PMO employee to begin being mentored by eBridge in the Project Management role and to handle part of the plan tasks that would be defined to get a thorough project plan in place*
- *Put a small governance committee in place to immediately review & prioritize the original requirements, review the added requirements, and agree on the final set of requirements that would be implemented in the new product*
- *Conducted weekly status & review meetings with all department leads*
- *Modified the testing processes and developed entrance criteria for each step in the chain*

HealthMarkets

Initial Engagement: eBridge was asked by this Dallas healthcare company to quickly assist them with a major short-term strategic goal – immediately stop the decline of existing policyholders and the mounting fines from state governing bodies for not paying claims in a timely fashion. One of the highest level strategic goals of the company was to increase the number of new customers and to increase existing customer retention. Over the previous twelve months, the goal was totally not being met and the company was losing market share.

Understanding the highest level goal, eBridge developed a list of the major initiatives that would have been needed to realize the goal. The main focus areas were Customer Service and Claims Processing.

Working with the CIO and Sr. Director of IT, eBridge interviewed the leaders to first hear what these leaders had observed and what areas they suspected were the root causes. These “most likely” processes were then quickly documented from subject matter expert interviews, existing documentation, and reviews of operational reports, log files and database queries. Additionally, cycle times and volumes of processing were added to the process diagrams to point out where along the value chain bottlenecks and issues were occurring. Finally, after reviewing the information with the Sr. Director, actual operation data was collected for a few days in the most problematic steps of the value chain. The data was charted using Lean Six Sigma techniques and from that, formal root cause analysis ensued and eventually the most feasible solutions were developed and a plan of action developed.

Emergency improvements were implemented one at a time and results charted on the same Six Sigma charts. The entire analysis, documentation, assessment, recommendation, development and implementation process took only two months, and the first implementation reduced the cycle time by 80% and began to track daily where problematic claims were flowing. The long-

term strategic goals were thus put back on track as claims begin flowing through the systems more timely and claims with errors were able to immediately be found and corrected.

Second Engagement: For this engagement, the emphasis was placed upon an overall Enterprise Architecture perspective to help guide the company to a more process-focused, lean operation with significantly reduced IT costs. The client desired a comprehensive set of artifacts that would be maintainable long into the future, that would provide key information that executives needed to determine how to approach the future (utilize COTS packages vs. homegrown, etc.), and that would provide a roadmap and guides for all future projects to assure they were aligned with the key priorities and goals of the company.

eBridge was able to help IT understand SOA and to emphasize how business process re-engineering should be the first step in the transition to SOA. eBridge helped the client rethink their initial approach, and helped the client select the right plan of action and the tools best suited for the client needs. Using some of the eBridge base templates eBridge provided a "startup" set of artifacts to use in capturing all the needed information on processes, systems, roles, goals, databases, servers, interfaces and programs/projects.

In a very reasonable amount of time, the first iteration of the documentation was able to provide enough information for the business and Solutions Architects to begin impact analysis for each new project entering the development pipeline. The business began to assume the leadership and responsibility for taking the high level business process decompositions and diagrams to the lower levels where needed, and they began to use these models as starting points for defining the requirements for each project.

Third Engagement: For this engagement, the client utilized the Enterprise Architecture roadmap to focus on the need for an enterprise system for enabling a more service-oriented approach to the mainframe and distributed systems, and to replace a brittle system responsible for EDI and transforming incoming claims in various formats. eBridge consultants helped develop the short list of possible products, developed the RFI using the eBridge methodology artifacts, conducted the proofs of concept with the three vendors, and evaluated the results with the HealthMarkets IT leaders. Tibco was chosen as the best product and eBridge helped install the system, architect the initial set of services, and implement the first replacement pieces of the overall messaging and middleware application.

City of Charlotte, NC

The City of Charlotte, NC, needed a better architecture for integrating the numerous systems used in various city departments. Information captured in each individual system was not available to other systems, and city leaders and staff were required to use too many methods to access consolidated information to run the operations effectively.

eBridge was asked to assess the situation and recommend solutions. eBridge first performed a city-wide Service Oriented Architecture readiness assessment and developed a roadmap of the proposed migration steps in a formal SOA Adoption Plan. After approval by the City CIO, eBridge established the Enterprise Architecture role and developed the Enterprise Architecture standards which would be followed in executing the SOA Adoption Plan and roadmap.

eBridge tailored a SOA methodology for the City, the Interface First Integration Methodology, which places emphasis upon the design of the interface prior to use or implementation of the

service functionality. The methodology provided guidance to the City IT department on how to begin integrating systems in a way that utilized other SOA standards adopted by the City.

The actual SOA standards were then developed, including the City SOA Standards, the Service Interface Specification Standard, the Web Service Standard, and the Integration Architecture Reference Model. All standards and the methodology were accepted by the City and adopted in 2008.

Finally, eBridge provided ongoing architectural review of various RFP's and Professional Service Contracts to assure compliance to the new standards.

8. eBridge References

Category	Database Management
Project Description	<p>A repeat client, this fast-growing, niche, enhanced communications provider shifted their telephony services from a site based model to a model supporting billing processes in a more manageable, cost effective centralized data model. This client realized that the impacts of system downtime and system support changed dramatically when it went from 3300 independent premise-based databases supporting a single to one consolidated and centralized database supporting 3300 customers</p> <p>This shift created the need to create a data model, and all its supporting data management tasks, that supported multiple premises. Our understanding of the difficulties in this shift in design from single customer to multi-customer set the course of this project towards an operations friendly system.</p> <p>Deploying both a database design expert and a skilled database management professional, we engaged in the following activities:</p> <ul style="list-style-type: none"> □ Requirements collection and analysis □ Conceptual database design □ Choice of a DBMS □ Data model mapping (also called logical database design) □ Physical database design □ Database system implementation <p>In addition, eBRIDGE negotiated product, support and third party use licensing with the database vendor on favorable terms. eBRIDGE continues to function in an appraisal role on performance, high availability and fault tolerance.</p> <p>Securus Technologies now persists, processes, and correlates over 430 million XML and chargeable record messages per year. Now Securus has the capability to remove their premise based deployments with the added confidence of lowered financial, support and service level risks.</p>
Length of Project	8 months
Customer's Name	Securus Technologies

Category	Enterprise Services
Project Description	<p>PwC lost much of its IT capability when it divested its IT consulting unit. The decentralized management structure of the new IT department made it difficult to prioritize projects for several major initiatives. Managing the implementations also seemed daunting.</p> <p>eBridge helped PwC move to a disciplined approach to project portfolio management and investment rationalization. We applied frameworks, structure, processes, tools, and culture change throughout their department for decision and control purposes. We brought in and customized an SDLC and integrated it with investment rationalization, release management, and enterprise architecture processes. We integrated and enhanced existing tools sets rather than promulgating expensive tool suites. SEI CMM measurement concepts were introduced to inspire continual improvement.</p> <p>This solution enabled PwC to self-govern and mature their new IT delivery and management processes and establish the IT department as a predictable, improvable cost center.</p>
Length of Project	2 years
Customer's Name	PricewaterhouseCoopers

Category	Middleware Integration
Project Description	<p>This client faced challenges in the integration of disparate systems and processes responsible for the collection of chargeable records generated out in the field. They did not have resources, experience and skill to manage the shifts in thinking, scale and technology.</p> <p>The reason for this issue was growth and system proliferation through numerous merger and acquisition activities.</p> <p>Securus Technologies realized that in order to maintain reasonable service levels, it needed to unify records collection processes and increase visibility into the metrics of their customer affecting billing processes.</p> <p>Budget and time constraints required this integration model to integrate all the existing legacy systems irrespective of the platforms and operating systems that their numerous</p>

systems were based upon, and be flexible enough for the following specifications:

- New and advancing platforms, databases, and development technologies for the source and target
- Messaging exchange patterns (MEP) supporting industry standards and internal processes
- Numerous external input and output data formats for the source and target (EBCDIC, ASCII, Binary, etc.)
- Disparate frequency of data transfer and outage periods
- On-net and Off-net system connectivity details
- Uncommon, legacy, and standardizing file structures that were being processed, if applicable

Finally, the demands of growth through acquisition demanded a solution demonstrating enough scalability to enable new systems to be easily plugged into this solution in the future with minimal changes.

eBridge provided the resources and experience to deliver an end-to-end integration solution to meet Securus' needs. After engaging in a short needs analysis, eBridge not only implemented an integration solution unifying this customer's processes, but eBridge resources executed on a number of related operational business cases including:

- A solution to monitor system availability and a process to correlate system utilization metrics
- Integration source control via a source management tool and associated processes
- Deployment activity checklists
- More rigorous change control procedures
- A more detailed interface specification template for deployment into the documentation repository
- Specific recommendations on mechanisms to support reliable delivery of transactions

Securus Technologies now collects, processes, and measures over 1,200,000 chargeable records per day on a unifying integration platform. With the use of a common data format (CDF), Securus can now continue to support their numerous field systems, extending their lifetime and use.

"I want to commend the eBridge team for their leadership and delivery at Securus. The eBridge team has been instrumental in setting new technical direction with regards to application integration and data movement through EAI technologies. As you know, the DNA application was promoted to production last week and would not have been

	<i>accomplished with their (eBridge) leadership. I very much appreciate their efforts."</i>
Length of Project	12 months
Customer's Name	Securus Technologies

Category	Electronic Commerce / EDI
Project Description	<p>H&R Block was expanding their points of presence in an effort to stop the erosion of their competitive position. They were especially vulnerable in Puerto Rico where they had severe client wait times. They wanted to add business capacity by placing kiosks in Wal-Marts and Sam's stores in Puerto Rico.</p> <p>eBridge managed this expansion project. The solution included telecom, kiosks, and IT equipment in 8 stores. This project resulted in H&R Block's Puerto Rico region as having the top 3 offices in preparing Tax Returns by mid tax season.</p> <p><i>"Our Puerto Rico expansion was a great success!"</i></p>
Length of Project	6 months
Customer's Name	H&R Block

Category	Project Management Services
Project Description	<p>Product Quality was trending poorly for ERI (Telecom Equipment Manufacture) who had experienced rapid growth but had continued to maintain a start-up mentality. The company also was not able to predict product availability and cost. With the upcoming introduction of the next generation optical switch, they quickly discovered that complexity and multiple product lines would not scale through "osmosis".</p> <p>eBridge provided an integrated (hardware and software) Systems Development Lifecycle process that enabled clear work product accountabilities within the Engineering Department and we provided PMO, Project Management, and Product Management processes with control gates to govern the projects effectively.</p> <p>ERI has standardized on these new processes and they re-baselined their optical switch project to use the SDLC going forward. This pivotal project is back on-track for market introduction.</p>

	<p><i>"I would like to thank you for your work, kindness, and thoughtfulness. I think your approach and attitude toward consulting and change management are correct. I know that it is extremely difficult to come into an organization like ours, negotiate the relationship, overcome the fear and suspicion, gain the trust of the people and be productive. You managed all these issues gracefully and effectively and you did a great job in the limited time that was given to you." -- Moshe Suberri – Head of Software Engineering</i></p>
Length of Project	1 year
Customer's Name	Eastern Research, Inc.

Category	Telecommunications Services
Project Description	<p>Sprint PCS needed to keep up with market demand for new services that enabled text messaging, pictures, and email from PCS phones (known as 3G technology). Sprint PCS needed to double its capability and offer new services in a very quick timeframe. eBridge provided program management and technical expertise to bridge the gap between IT and the network.</p> <p>3G was successfully launched and is being sold today. Sprint PCS doubled its capacity and increased voice and data network efficiency by getting an incredibly efficient use of spectrum. And the network is packet-based so it's always on. The technology we delivered enables text messaging, interactive games, downloadable ringers, screensavers, device personalization, still pictures, video imaging, and full Internet browsing. It also enables on-demand conferencing, and enhanced location-based services.</p>
Length of Project	10 months
Customer's Name	Sprint PCS

Category	Telephony Services
Project Description	<p>Securus wanted to turn several challenges into opportunities through a Voice over IP (VoIP) solution. Its customer model, which focuses on correctional facilities, is characterized by high risk with a lower than normal customer economic status. It needed to:</p> <ul style="list-style-type: none"> - Reduce support costs while increasing potential

	<ul style="list-style-type: none"> - revenue from same customer base - Reduce security risks through enhanced call control - Increase customer satisfaction rating - Enable new investigative features like call monitoring and control - Reduce expensive transport and operational costs <p>Collaborating with the client, eBridge helped the client team architect, plan and implement a transformational VoIP call processing solution:</p> <ul style="list-style-type: none"> - Enabling Securus to stay in the call path and handle the call and customer according to risk - Shifting toll costs from long distance to nearly toll free - Increasing customer satisfaction in placing previously blocked calls to loved ones - Managing debt risks uniquely per call rather than as an aggregate category <p>Opting to deploy a converged architecture, both PSTN and VoIP, call applications are now deployed as software and services rather than card based hardware. IP-enabling a circuit-switched network made sense to avoid uncertainty, minimize disruptions, and preserve much of the old investment. This architecture allowed incremental migration on a piecemeal and budgeted basis by adding new interfaces to support required IP telephony features. The solution easily paid for itself within its first quarter in production.</p>
Length of Project	1 year
Customer's Name	Securus Technologies

Category	Strategic IT Planning; Architecture; COTS Integration
Project Description	<p>eBridge was originally brought in by HealthMarkets to pinpoint the root cause(s) of a major operational problem and recommend a permanent solution. After reviewing the processes and developing metrics based on past data, eBridge recommended three key changes and then lead the IT team in implementing those changes over a three month period. Throughput tripled for claims processing after the changes were placed into production, and the company was able to avoid buying additional hardware and software that had been planned to "band-aid" the problem.</p> <p>eBridge was then selected to assist HealthMarkets in establishing an Enterprise Architecture team and assisting in the selection and implementation of an enterprise class middleware and messaging COTS product. After selection and purchase of the product, eBridge helped define SOA</p>

	<p>standards for the organization, design the highest level services for claims processing, and develop the initial set of SOA components.</p> <p>The third engagement allowed eBridge to develop a comprehensive roadmap for migrating the company from out of date legacy applications to a future state of SOA-based systems.</p> <p>eBridge was brought in for the most recent engagement (Insphere) to (a) develop the authentication and security architecture and framework for the new subsidiary, and (b) develop architectural artifacts for the business processes, applications, interfaces, system interactions and data stores of the 20 applications supporting the business.</p>
Length of Project	2.5 years
Customer's Name	HealthMarkets & Insphere (HealthMarkets subsidiary)

<p>Category</p> <p>Project Description</p>	<p>Portal Architecture</p> <p>Information regarding project lifecycle status, history, estimation, resource assignment, and planning dates was not readily available or was collected in an inconsistent, unauditable manner across multiple data sources or systems, or wasn't being collected at all.</p> <p>Having recently deployed a new enterprise-wide development process, Sprint had no consistent vehicle for collecting project data and exposing it to all constituents. Most projects involved multiple application impacts and had hundreds of affected individuals. Communications were not happening in a timely or effective manner. Traditional methods of email and shared folders were proving ineffective, particularly with regard to traceability and auditability of changes to estimation information.</p> <p>Sprint needed a common facility through which all project lifecycle data could be consolidated and exposed, kept up-to-date in real time, with full role-based security, traceability and auditability of changes.</p> <p>eBridge conceptualized, proposed and developed a web-based Enterprise Development Process Portal, consolidating data from back-end reporting systems, taking input directly from users, and implemented a software process lifecycle based workflow to track projects from inception to completion.</p> <p>Sprint was able to deploy reporting of estimation, project financial data, and project status to all levels of management and directly to project participants through an enterprise-</p>
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	<p>wide web-based application.</p> <p>The deployed architecture consisted of JSP pages and EJBs supporting integration with back-end systems on an ORACLE relational database management system. The deployed application provided the following capabilities:</p> <ul style="list-style-type: none"> - Process-contextual views of project data in work queues - Consolidated project estimation and actual financial reporting - Integrated, custom workflow and security - Project lifecycle tracking and metrics - Resource assignment tracking - Generalized reporting database
Length of Project	9 months
Customer's Name	Sprint

Category	Strategic Technology Planning
Project Description	<p>After the merger of three major transportation companies created YRCW, eBridge was asked to lead the effort of the strategic integration of the processes and applications of the merged corporation. As with any major merger, each company in the merger typically has many duplicate departments, functions, business processes and systems that support the business processes. It was critical for eBridge to focus on helping the client articulate the current vision; issues and strategic goals of the organization. In this Planning stage, clearly understanding these goals and issues was the precursor to developing the approach for analysis of the current state.</p> <p>After the initial work sessions, eBridge elicited five major corporate issues. Based on those major issues, and with the assistance of eBridge facilitation, the leaders agreed on the following strategic goals:</p> <ul style="list-style-type: none"> • <i>Significantly reduce costs of doing business, including reduction of IT expenses by 40% within two years</i> • <i>Improve customer service, especially regarding the ability of customers to easily track the status of their orders throughout the order lifecycle</i> • <i>Increase the load factor (ratio of cargo to capacity) for long-haul transportation; eliminate "empty" trips</i> • <i>Reduce the cycle time of point to point transportation</i>

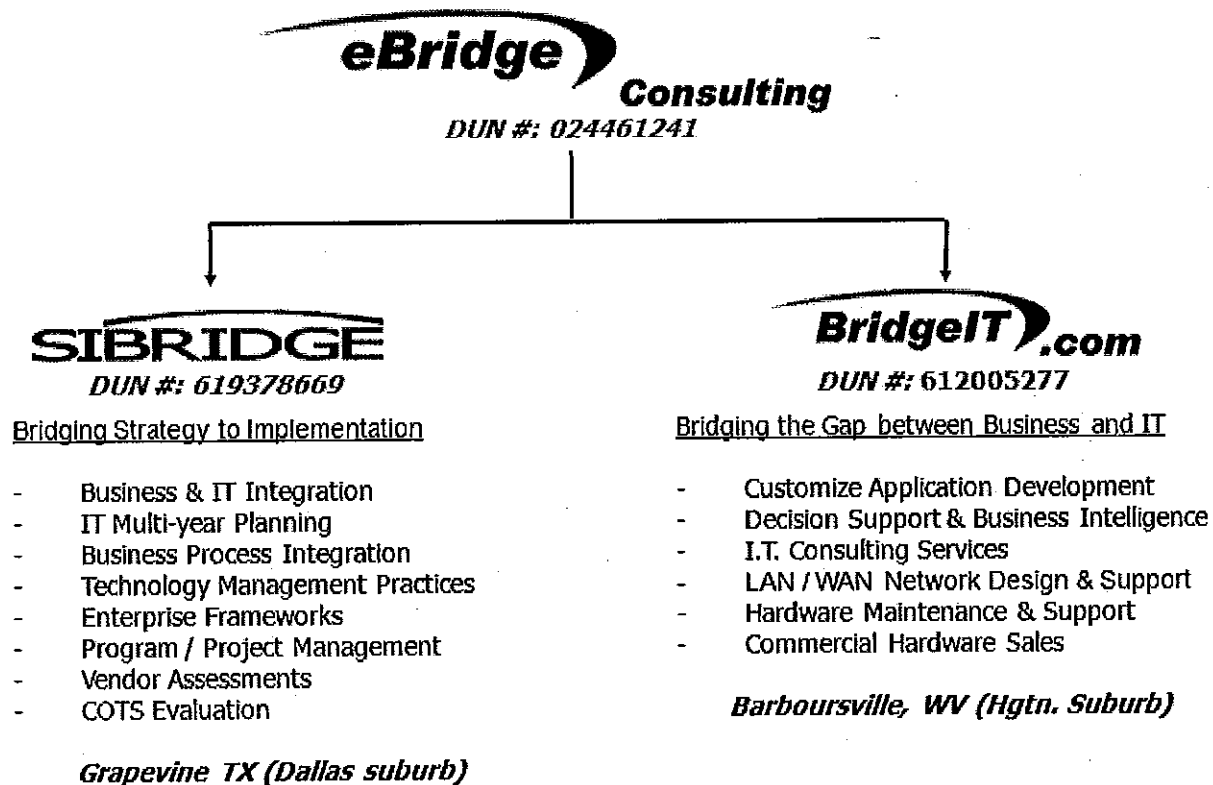
	<ul style="list-style-type: none"> • <i>Standardize services across all business units</i> <p>The resulting plan of action involved identification of the key business process areas associated with the issues and goals, modeling of these processes in an organized and efficient manner, working with the business to re-engineer the processes and standardize the artifacts used in the processes, and then mapping the application/systems portfolio to the current and to-be processes. eBridge developed the plan and roadmap and subsequently provided the guidance, facilitation, modeling expertise and analysis to successfully complete the project.</p>	
	<p>Length of Project</p>	<p>1.5 years</p>
	<p>Customer's Name</p>	<p>Yellow Roadway Corporation Worldwide (YRCW)</p>

Respecting the privacy and time of our clients, named references and contact information for each can be provided to you upon request.

Appendix A – Financial Statement & DUNS

1. DUNS Information

- **eBridge Consulting** - DUN #: 024461241
- **SIBridge** - DUN #: 619378669
- **BridgIT** - DUN #: 612005277



2. Financial Statement

eBridge Consulting, LLC Profit & Loss

12/29/2008

	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>TOTAL</u>
Ordinary Income/Expense				
Income				
Total Income	6,613,425.38	6,949,596.85	5,828,465.81	19,391,488.04
Total COGS	<u>5,140,024.99</u>	<u>5,099,505.37</u>	<u>4,668,980.97</u>	<u>14,908,511.33</u>
Gross Profit	<u>1,473,400.39</u>	<u>1,850,091.48</u>	<u>1,159,484.84</u>	<u>4,482,976.71</u>
Total Expense	1,044,379.66	869,638.28	933,399.20	2,847,417.14
Net Ordinary Income	<u>429,020.73</u>	<u>980,453.20</u>	<u>226,085.64</u>	<u>1,635,559.57</u>
Total Other Income	10,180.55	21,242.98	3,615.26	35,038.79
Net income	<u>439,201.28</u>	<u>1,001,696.18</u>	<u>229,459.90</u>	<u>1,670,357.36</u>

eBridge Consulting, LLC
Summary Balance Sheet

12/29/2009

	<u>2006</u>	<u>2007</u>	<u>2008</u>	<u>Total</u>
ASSETS				
Current Assets				
Checking/Savings	789,993.30	1,303,767.40	743,543.54	2,837,304.24
Accounts Receivable	571,295.58	753,399.02	413,079.28	1,737,773.88
Other Current Assets	<u>44,322.16</u>	<u>13,868.38</u>	<u>98,820.49</u>	<u>157,011.03</u>
Total Current Assets	1,405,611.04	2,071,034.80	1,255,443.31	4,732,089.15
Fixed Assets				
Fixed Assets	51,824.70	46,290.31	12,656.43	110,771.44
Other Assets	<u>382,861.56</u>	<u>334,489.79</u>	<u>236,532.32</u>	<u>953,883.67</u>
TOTAL ASSETS	<u><u>1,840,297.30</u></u>	<u><u>2,451,814.90</u></u>	<u><u>1,504,632.06</u></u>	<u><u>5,796,744.26</u></u>
LIABILITIES & EQUITY				
Liabilities				
Current Liabilities				
Credit Cards	14,885.70	2,343.88	895.35	18,124.93
Other Current Liabilities	<u>395,412.93</u>	<u>34,383.86</u>	<u>30,333.05</u>	<u>460,129.84</u>
Total Current Liabilities	410,298.63	36,727.74	31,228.40	478,254.77
Long Term Liabilities				
Long Term Liabilities	<u>17,108.96</u>	<u>287,150.64</u>	<u>207,560.01</u>	<u>511,819.61</u>
Total Liabilities	427,407.59	323,878.38	238,788.41	990,074.38
Equity				
Equity	<u>1,412,889.71</u>	<u>2,127,936.52</u>	<u>1,265,843.65</u>	<u>4,806,669.88</u>
TOTAL LIABILITIES & EQUITY	<u><u>1,840,297.30</u></u>	<u><u>2,451,814.90</u></u>	<u><u>1,504,632.06</u></u>	<u><u>5,796,744.26</u></u>