
Business Technology Advisor - Definition of Services and Components (DSC)

Introduction

This document describes and defines the Business Technology Advisor (“BTA”) service delivered by Tigunia, LLC, according to the relevant Statement of Work and Tigunia’s Master Services Agreement (“MSA”).

The descriptions, features, and scope of the BTA are referenced below. The collection of these services and related efforts are collectively referred to as the “Service.”

Objective (Mission Statement)

The Business Technology Advisor (BTA) engagement gives organizations a dedicated retainer commitment for strategic IT consulting. It is fulfilled by seasoned industry experts who are functional specialists in business applications and IT. This service is designed to extend the capabilities of Client’s internal team, enhance existing skill sets, and provide valuable insights and strategies for effective IT leadership.

Scope of Service

The scope of this service is broadly defined to encompass a wide range of consulting, strategic guidance, and support activities across various IT and business technology domains. While this service is designed to be flexible, any specific focus areas, including systems, applications, locations, or technology initiatives, will be detailed in the corresponding Statement of Work (“SOW”).

Any additional services or activities outside the agreed-upon scope will be considered out of scope. They can only be included through a formal agreement documented in an updated SOW or separate engagement agreement. This flexibility ensures that services align with Client's evolving needs while maintaining clear boundaries around the engagement.

Service Tier & Description

This solution is designed as a retainer commitment. Clients engage in a retainer arrangement, ensuring consistent access to expert guidance and support tailored to their unique IT challenges and objectives.

Support for Any Size Organization

- **Strategic Oversight:** The BTA Service provides essential strategic guidance to organizations lacking formal IT leadership, enabling them to manage IT initiatives and resources effectively.
- **Collaboration with In-House IT Staff:** The service complements existing mature IT teams, enhancing their capabilities with additional support and expertise tailored to the organization's needs.

Service Tiers

- **Core (12 hours/month)**
 - Ideal for small businesses or organizations with limited IT leadership.
 - Focus on foundational IT strategy and support, offering critical guidance for key technology decisions and projects.
- **Standard (24 hours/month):** Designed for mid-sized organizations with more complex IT environments or those needing consistent collaboration between in-house IT teams and external experts.
- **Premium (48 hours/month):** Suited for larger enterprises or organizations with complex, multi-faceted IT needs.
- **Custom (up to 160 hours/month)**
 - Tailored engagements for Clients requiring extensive support and oversight.
 - Available upon request, this tier offers up to 160 hours of dedicated BTA services per month. It allows full-scale IT strategy development, ongoing project execution, and comprehensive support for large IT departments or highly specialized IT initiatives.

Terms of Engagement

- **Retainer Commitment:** Clients engage in a monthly retainer based on the selected service tier (Core, Standard, Premium, or Custom). The engagement is subject to a minimum commitment of **one year**, ensuring ongoing access to expert IT guidance and strategic support over an extended period.
 - **Scalability:** The service is flexible, allowing Clients to adjust service hours or move between tiers as their business needs evolve, with the ability to scale up service hours to a maximum of 160 hours per month in the Custom tier. Service increase requires a proactive request of at least 30 days' notice.
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- **Renewal & Termination:** The agreement can be renewed annually after the initial one-year commitment. However, a **30-day notice** before the end of the contract term is required.

Mutual Commitment

This service is built on mutual commitment, ensuring both parties are dedicated to achieving strategic outcomes. The retainer secures Client's access to expert guidance while allowing us to allocate the necessary time and resources to meet Client's needs. This model Tigunia to be available for proactive, thoughtful planning, while Client's commitment guarantees the focus and intentionality required to drive impactful results. Together, we create a framework for sustained collaboration and long-term success.

Resource Allocation & Delivery Team

Client will be assigned a primary single point of contact, referred to here as "Client's advisor." Client's advisor and their supporting team members are a skilled team of professionals, including:

- **Customer Success Manager (CSM):** The CSM serves as the primary point of contact, coordinating efforts and ensuring the seamless delivery of services. They maintain a deep understanding of Client's unique environment and objectives.
- **Solutions Consultant:** Solutions Consultants are industry experts who provide high-level strategic guidance on their applicable area of knowledge, including business operations, business intelligence, security, or other IT initiatives. They align technology with business goals and ensure that best practices are followed. (Each Solutions Consultant will have a focus area, such as Platform, Enterprise Applications, Business Intelligence, etc.)
- **Subject-matter Experts (SMEs):** The delivery team includes SMEs in various technology domains, such as cybersecurity, cloud solutions, and data management. These experts provide specialized knowledge and insights to support specific initiatives and challenges.
- **Project Managers:** When project-based work is involved, dedicated project managers ensure that resources are allocated effectively and timelines are met, facilitating successful execution.

Each project or task requires the right skills and experience to execute effectively and efficiently. Client's CSM will ensure that Tigunia resources are allocated correctly to achieve goals on time and within budget.

Client's Advisor knows Client's business and goals and can customize the growth plan (road map) to meet Client's needs most effectively. They have firsthand knowledge of the ins and outs of Client's processes, users, and infrastructure to offer the best solutions and advice while understanding Client's preferences.

Management & Leadership

Client's BTA engagement includes project planning and management, resource allocation, and vendor coordination. Additionally, Client will benefit from customized leadership of our helpdesk services and other operations.

Project Planning and Management

This single resource will manage any new project from the IT side. Clients have a better project experience when the PM is familiar with the business and its goals and objectives. They ensure that all project plans are being executed as agreed to from the scope of work. Because of the deep Client knowledge that the CSM holds, the User Acceptance Testing phase of the project is much more effective, lending to a much more positive user change experience. The CSM also benefits the business by staying involved in its future long after projects are completed and lessons learned can be put into practice.

Cadence

When and how will the BTA engage? The BTA is designed to work with Client's IT goals, budget, and timelines. Based on these needs, the frequency of engagement could be daily, weekly, biweekly, or on-demand stand-up meetings to execute deliverables. Client's CSM will coordinate this for all projects, reporting, and assessments. The cadence of the service is explicitly defined in the corresponding Statement of Work ("SOW") or set mutually between Client and Tigunia's assigned advisor.

Deliverables

Every organization has unique challenges and objectives. This service is tailored to Client's organization, providing deliverables that every organization needs and unique to Client's operations.

Strategy

This service provides first-class assistance for developing or enhancing solution architecture, product selection, and technical road mapping, essential to achieving Client's overall business strategy and plans. Client's CSM will partner to provide the right solutions at the right time to improve business continuity and productivity.

Vendor Coordination

The BTA program offers peace of mind that all resources involved in Client's IT strategy are on the same page, communication is consistent with all stakeholders, and the right vendors are being leveraged at the correct times and for the right reasons. Client's CSM will also assist with any required RFP protocols for services or if a new vendor is needed.

Systems Intelligence

Client's IT infrastructure and solution architecture are significant expenses to Client's business, and the BTA helps to see and ensure that it is getting what it paid for and highlights Client's ROI. Through reporting and data-driven evaluation of Client's business technology, we help Client to "see" how the technology works for Security, Compliance, Operations, Support/tickets, and application-specific usage and monitoring.

Deliverables included in every BTA Engagement:

- **Regular Strategy Sessions:** Scheduled meetings to discuss IT strategy, review progress on ongoing initiatives, and make necessary adjustments based on evolving business needs.
 - **IT Roadmap Development:** We create and maintain a tailored IT roadmap that aligns technology initiatives with Client's business goals, ensuring that projects are prioritized and executed effectively. By leveraging industry insights and trends, we encourage Clients to adopt innovative technologies and strategies that drive business value.
 - **IT Process documentation:** Infrastructure, security, and data management diagrams are key elements in any IT organization; Client's BTA services will ensure that these are built and updated as Client's IT platform matures.
 - **Risk Assessment and Compliance Guidance:** Regular assessments of IT risks and guidance on compliance requirements, helping organizations navigate regulatory landscapes and implement best practices.
 - **Cyber Liability Guidance:** An organization's Cyber Liability strategy is key to its threat commitment and IT direction. Our professionals have experience completing assessments and planning improvements year by year.
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Dedicated Contact: Each engagement is supported by a **Customer Success Manager (CSM)** who serves as the primary point of contact. The CSM coordinates the efforts of the BTA team to ensure seamless service delivery and may collaborate with other individual contributors to fulfill service objectives.

Tailored Optional Deliverables: This list contains items not automatically included in our BTA engagement, but our customers have found them to be impactful uses of their hourly allocations.

- Risk Assessment
- Business Impact Analysis (BIA)
- Business Continuity Planning (BCP)
- Security & IT Policy Assistance
- Compliance -HIPAA
- Compliance -PCI
- Additional compliance and certification
- Security Audit and report of Endpoints
- Email Security Audit and report
- Health consistency checks on endpoints
- Microsoft Office 365 applications auditing and monitoring
- Google G Suite line of business applications strategy
- Monitor for unusual activity among users
- Managed connection audit and reporting
- Project Reporting
- Audit user accounts, service accounts, and related controls
- Automated and Custom Account Reports
- Network Scanning
- Case SLA Report
- Educate and correct user issues or process improvements
- Technology Training
- Process improvement consultation
- Unified Communications strategy
- Internet Service Provider Broker Management
- WAN Cellular failover plans
- Administer change control and procurement during the project life cycle
- Technology Budget Monitoring
- E-Discovery Services
- Implementation and project oversight
- Review Documentation in its entirety for drift or new elements
- Document recent security threats
- RPO, RTO, Retention Planning, and Testing of each
- Technology solution design and development
- Proof of concept lab testing

Note: Efforts listed here that are related to compliance or attestation are offered to assist and direct. Tigunia does not perform attestation or certification services. Tigunia only provides remediation, direction, and strategy.

Continuous Improvement

- **Feedback Collection:** Regular surveys and Client feedback sessions to assess service quality.
- **Review Cycles:** Regular reviews of the service to address timeliness and value and assess service improvements.

General Exclusions

This Service does not include direct IT management or support functions. Technical implementations, system configurations, and daily IT operations are outside the scope of this service but can be offered through separate agreements or professional services engagements.

Service Level Agreement (SLA)

All services herein are provided under the commitments in the corresponding “Tigunia BTA Service Level Agreement (SLA)” without warranty or guarantee.