



## **Terrific Technologies, Inc.**

### **Proposal For Holiday Products, LLC**

#### **Prepared for:**

Joe Smith, President  
Holiday Products, LLC

#### **Prepared by:**

Carl Quotebuster  
Terrific Technologies

**Prepared On: 11/29/2016**

Agreement #  
Statement of Work #  
Version #

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## Contact Information

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### PROJECT MANAGER

Project Manager Name:			
Phone Number:		E-mail:	

## About Terrific Technologies



**Terrific Technologies, Inc.**

Terrific Technologies, Inc. provides total technology solutions focused on advancing your business and building your bottom line. TTI specializes in the following solutions...

- Business telephone systems
- Voice Over IP (VoIP) Communications solutions
- LAN and WAN technologies
- Business software applications such as CRM, database management and ERP solutions

At Terrific Technologies, we use technologies as the tools to build solutions that are specifically customized to your needs. More importantly, it's our know-how and patented discovery, design and implementation processes that enable us to provide solutions like none other.

## Executive Summary

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**RED section is for internal use. Delete when section is completed!!!**

The smaller or basic boilerplate this section is, the lower your likelihood of winning the deal will be!

Make sure this section is focused completely toward senior executives and contains as little technical jargon as possible. This section should be focused on what you have found in your discovery sessions. It is vital that this section ties in specific customer needs to our solution.

If you have trouble making this section contain 5-10 paragraphs of customer specific detail you need to go back and review your notes.

Bullets and perhaps even a simple diagram are good in this area.

Try to include information on how our project connects to their business objectives at the senior level. A great example is if the CEO has stated objectives, this project should tie somehow into those objectives.

The Components of a good Executive Summary include:

- Background
- Journey
- Obstacles
- Solution
- Results

During the discovery process, we identified the following issues:

- Moving to a new location without current phone system
- Cannot process calls across multiple locations seamlessly
- No call center functionality
- Poor call center reporting
- Phone system is not integrated with CRM/ERP system
- Discontinued System

We also identified the following needs and requirements:

- Quality of service prioritization
- Data traffic monitoring
- Department call center
- Call accounting/reporting
- Needs more cowbell!

## Proposed Solutions

### Small Business Edition 100

Designed for small and medium-sized businesses with up to 100 users, Small Business Edition 100 (SBE 100) helps small and mid-sized businesses improve communication with customers and suppliers, make collaboration among employees more effective, and keep mobile and remote workers connected.

Small Business Edition 100 is available in the form of bundles that include ShoreTel voice switch(es), rack mount tray, optional rack-mountable ShoreTel UC Server 20, and software licenses for collaboration and improved productivity.

Bundles can be coupled with additional licenses, phones, and switches to meet customer requirements - up to 100 extensions, 120 mailboxes, and 5 sites per SBE 100 system. All SBE 100 bundles can scale beyond 100 users (up to thousands of users) simply by applying an upgrade license.

#### Partner Benefits

Due to its unique modular architecture, ShoreTel fits all user segments - from small to large. This allows you, as a reseller, to position ShoreTel across all business sizes and as a result minimize your training, spare parts, and accreditation requirements.

#### Customer Benefits

With SBE 100 customers get a turn-key communication platform with a number of unified communications features included with each bundle:

- Voicemail limited only by the size of the server's hard drive
- Unified Messaging to deliver voice, fax and email messages to a single application, such as Outlook inbox
- Click-to-call for fast dialing contacts directly from the computer
- Extension assignment and simultaneous ringing for making and receiving phone calls from any communication device, as if you were in the office
- Workgroups to organize a basic contact center operation so there are no missed calls

### ShoreGear-90

The ShoreGear-90 is designed for mid-sized offices supporting both IP and analog telephones with analog trunking (i.e. 30 IP users, 4 analog extensions and 8 analog trunks at the same time). In configurations with a requirement for high IP user density with analog trunking, two ShoreGear-90 voice switches are a powerful combination (i.e. 2 voice switches providing 100 users, 16 analog trunks). It uses a small 1U half width chassis and so is ideal for sites where rack space is valued at a premium.



The ShoreGear-90 supports up to 90 IP phones and up to a maximum of 12 analog ports - 8 loop start trunk and 4 analog extension ports. The ShoreGear-90 communicates with IP phones, soft phones and other IP endpoints using the Media Gateway Control Protocol (MGCP). The ShoreGear-90 interfaces to standard analog trunks using loop start or wink start signaling as well as to standard analog telephones including CLASS feature phones with Caller ID Name and Number and Message Waiting.

### ShoreGear-T1

The ShoreGear-T1/T1K provides higher density trunking to the central office using T1 or PRI signaling. The ShoreGear-T1 can also be used as a gateway to legacy PBX systems.



## Features:

- 2 RJ-45 LAN connectors
- 1 RJ-45 T1 port for connecting the switch to a telephone company line
- 1 RJ-45 T1 monitor port for connecting test equipment
- 1 DB-9, RS-232C maintenance port for serial communications
- 1 3.5 mm stereo input for connecting a music-on-hold source
- 1 3.5 mm stereo output for connecting to a overhead paging system or night bell

## Specifications:

- Dimensions: 8.39 x1.69 x 14.88 in. (21.3 x 4.3 x 37.8cm)
- Weight: 5.3 lb / 2.4 kg
- Input voltage: 100-240 VAC, 50-60 Hz
- Power consumption: 1A max
- Humidity: 0-90% relative humidity (non-condensing)
- Operating temperature: 0-50° C

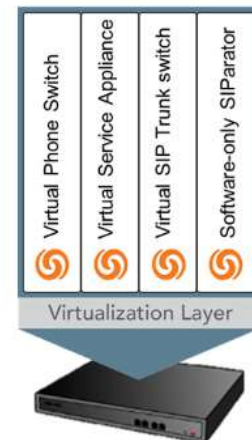
## ShoreTel UC Virtualization Advantage

ShoreTel UC Virtualization Advantage allows easy scalability for enterprise-grade customers by quadrupling the port capacity per appliance. ShoreTel virtual switches support up to 1,000 phones and 500 SIP trunks. This increased capacity simplifies deployment and eliminates the need to manage multiple appliances, especially for customers that choose a centralized UC deployment.

## ShoreTel 14.2

ShoreTel 14.2 delivers greater flexibility for customers, with the ability to mix and match hardware-based and virtual appliances in a single network, all managed using a single web- based management interface. With ShoreTel 14.2, customers may now select the UC deployment model that best suits their business and infrastructure needs – virtual, physical or any combination of both. The benefits are immediate – reduced hardware and operational complexity, higher application availability, increased scalability and reliability.

ShoreTel 14.2 enables all ShoreTel UC components, including call control, SIP trunks, and collaboration applications, to be virtualized and implemented on industry standard servers. In addition, virtualization allows customers to take advantage of features such as VMware High Availability and VMotion to improve applications availability and enable disaster recovery practices companies already have in place.



## ShorePhone IP 930D

Ideal for the receptionists, retail store staff, facilities and warehouse managers needing in-building mobility, the IP 930D delivers a comparable feature set to the IP230 in a cordless phone, including three line appearances, four function keys, three soft keys, and a 2.5 mm headset jack.

One Base supports up to four handsets, and a single site or location can support up to a maximum of 40 handsets in the USA and Canada, and up to 80 handsets in Europe, Australia and New Zealand. Optional Repeaters extend the distance IP 930D users can roam from the Base but may reduce the total number of handsets that can be used in the same airspace.



### Highlights:

- 3 Lines
- Headset jack
- 12 hours talk time, 5 days standby time

### Features:

- 4 Feature Keys
  - Transfer
  - Conference
  - Redial (History)
  - Hold
- 176 x 220 pixels backlit display
- Half Duplex (on-screen indicator) Speakerphone
- Audio Controls - Volume (independent control), Mute (on-screen indicator), Speakerphone (on-screen indicator), Headset (on-screen indicator)
- Specifications - DECT / MGCP protocol; 802.11n, DiffServ / ToS; G.722, BV-32, BV-16, G.711, G.729a codecs; G.711 uLaw, G.711 aLaw, G.729a codecs; Base: 10/100 Ethernet; Base: 802.3af, Class 2 PoE; 12 hours talk time, 5 days standby time
- Environmental - Humidity: 5-90% relative humidity (non-condensing); Operating temperature: 0-40° C

## ShorePhone IP 480

ShoreTel's advanced phone, the IP 480 provides 8 line appearances, expanded call history, visual voice mail and an integrated 10/100 Ethernet switch, allowing a network drop to be shared with a desktop PC.

### Highlights:

- 8 lines
- Full-duplex speakerphone
- Visual voice mail
- Expanded call history
- Built-in 10/100 Ethernet switch
- Support for use with ShoreTel Sky services is targeted for 2014



### Features:

- Feature Keys
  - Display soft-key feature keys and navigation keys
  - Transfer
  - Conference
  - Hold
  - Intercom
  - Redial (History)
  - Voicemail

- Options
  - Directory
- 297x160 pixels, backlit display
- Full Duplex Speakerphone
- Audio Controls - Volume (independent control), Mute (LED indicator), Speakerphone (LED indicator), Headset (LED indicator)
- Specifications – SIP protocol; VLAN, DiffServ/ToS, QoS; G.711, G.722, G.723, G.726, G.729a; iLBC, Linear16 codecs; Built-in 10/100 Ethernet switch; 802.3af PoE (standard), or local power (optional); Class 2 PoE (3.0 W idle / 4.4 W active / 4.9 W max)
- Environmental - Humidity: 5-90% relative (non-condensing); Operating temperature: 0-50° C

## ShoreTel IP Phone 655

The IP 655 is ShoreTel's newest desktop telephone with advanced functionality suitable for executives, administrative assistants and for use as a conference phone in small to midsize conference rooms.

The IP 655 features a large color display which lets users interact with the phone using its touch-screen capability and haptic (vibrational) feedback. Up to 12 lines can be configured on the set and users can personalize their phone by selecting from a list of wallpaper images.

Integrated into the sleek design is an advanced microphone array that delivers exceptional speakerphone capability for offices and small and midsize conference rooms when used with the optional extension microphone accessories. A VPN client and a gigabit Ethernet network interface are standard.

The IP 655 delivers an application platform with rich functionality including visual voicemail as well as an enhanced directory capability with telephony presence.

### Highlights:

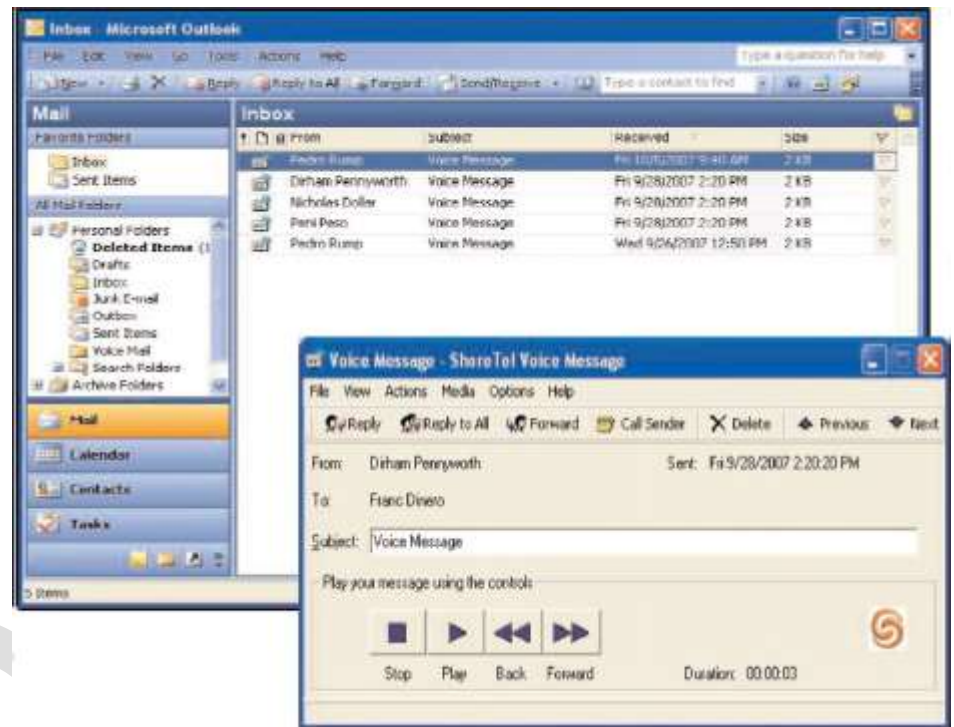
- 12 lines
- Large color touch screen
- Advanced microphone array technology
- Integrated VPN Client
- Gigabit Ethernet
- Visual voicemail
- Directory with presence indication





## Unified Messaging

ShoreTel's Unified Messaging is a comprehensive, simple, and robust solution that satisfies a full range of customer messaging needs, including access to voicemail, fax, and e-mail by a choice of popular methods. It can scale from ten to thousands of mailboxes quickly and easily when needed, without port and disk limitations. And because the



system is easy to install and administer in a dynamic workforce environment, organizations can quickly achieve a low TCO. Although ShoreTel's Unified Messaging is a native, fully integrated component of the ShoreTel UC system, it can also be seamlessly integrated with other PBXs and voicemail systems.

ShoreTel's Unified Messaging allows you to communicate quickly and easily, with anyone through:

### Voicemail

ShoreWare® voicemail service requires no additional hardware, consumes no ports, and storage is limited only by the size of the server hard disk. At enterprise locations, voicemail servers can be distributed to provide survivable voicemail and save WAN bandwidth.

### Unified Messaging

The ShoreTel UC system provides integrated messaging from any of the following popular interfaces:

- "Any-Telephone"**  
 "Any-Telephone" access is available with ShoreTel's embedded telephone user interface (TUI), which can be used to access voice messages stored on ShoreTel's application server and to interface with ShoreTel's embedded auto-attendant.
- "Visual"**  
 "Visual" access is available through either ShoreTel's ShoreWare Call Manager for the PC or ShoreWare Mobile Call Manager for mobile devices. Both provide a simple visual display, access to voicemails stored on ShoreTel's application server, and access to the corporate and Outlook personal directories.

- **Find Me**  
The Find Me capability helps callers connect with users even when they are not at their regular extension. Users can easily direct calls to ring first at their extension, then at any two other phones they assign.
- **Call Handling Modes**  
With a simple click, users can manage incoming calls when they are in a meeting, working from home or out of town. Users can also customize greetings, forward calls, specify voicemail pick up, and receive message alerts.
- **Automated Attendant**  
Auto-Attendant service provides 24-hour automated call answering and routing. Outgoing prompts can be easily customized and linked to the day or time of day. Individual departments can use their own unique greetings and options. The Auto-Attendant service requires no physical ports and can be distributed at enterprise locations to save valuable WAN bandwidth.

## ShoreTel Communicator

ShoreTel Communicator is a powerful unified communications (UC) application for users across an organization, whether an operator, a contact center agent, a knowledge worker or a road warrior. Available on multiple operating systems, ShoreTel Communicator makes it easy for people to communicate however they choose: by video, voice (wired or wireless), instant messaging (IM), and more.

Communicator delivers unified communications (UC) in an intuitive interface and is available in diverse environments such as Web browsers, Windows, iPhone, BlackBerry, and Nokia mobile phones. With minimal training, users across job roles can master a full suite of versatile tools for managing real-time communications on their computer or mobile phone, moving seamlessly between voice, video, or IM as needed.



Communicator also provides integrated advanced call management and quality desktop video in a highly customizable interface that is easy to set up. Instant messaging (IM) functionality gives users the power to contact people in remote locations, have sidebar conversations during calls, or to bring several people into a chat session. Tight integration with Microsoft Outlook enables access to directories and personal contacts for quick-dialing options that speed communication.

Pre-built integration of enterprise and CRM applications, including Salesforce, IBM Lotus SameTime, calendaring, and workflow, raises the bar on customer interaction by putting data where it's most needed. Communicator can also integrate with third-party information and applications via a rich set of application programming interfaces (APIs).

### Features and Benefits

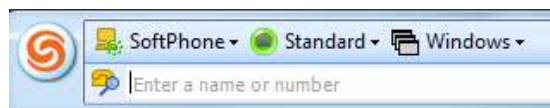
- Fully integrated application designed to meet the needs of all users
- Flexible and effective controls with a single interface designed to help streamline communications
- Tight integration with business processes
- Flexible deployment options including Web based and mobile devices
- One single interface makes training simple and reduces the IT workload

### Access Levels

Personal Access comes as standard with the ShoreTel UC system and offers a rich set of features designed for ease of use at the desktop.

Communicator also has 5 optional access levels to enhance the standard personal access feature set: Professional, Workgroup Agent, Workgroup Supervisor, Operator, and Mobile access – each designed to meet the advanced communications needs of specific business and contact center users.

Professional Access offers advanced features such as instant messaging, softphone, personalized call handling and high quality video.



Workgroup Agent Access enables call center agents to perform automatic call distribution (ACD) functions such as viewing calls in queue, log into queue and accessing team mailboxes.

Workgroup Supervisor Access helps call center supervisors monitor all their agent and queue activity. Supervisors can also monitor, coach, and barge into call center sessions.

Operator Access helps provide callers with a high level of personalized service with features such as busy call appearance and call pick up for operators, executive administrators and receptionists.

Mobile Access offers mobile users access to familiar functions such as ShoreTel QuickDialer, access to corporate and address book contacts, and visual voicemail. Users can make their mobile phone the enterprise extension on the fly and easily change their presence.

## ShoreTel UC Server 20

ShoreTel UC Server 20 is shipped with pre-installed Windows Operating System, pre-configured, pre-tested and ready for ShoreTel software.



ShoreTel includes UC Server 20 as an option with its Small Business Edition 100 bundles so that small and mid-size businesses can experience full benefits of Unified Communications without the need to source additional hardware.

### Specification

- Processor: Intel Celeron E3400, DualCore 2.6 Ghz, 800FSB
- Memory: 4.0GB, DDR3
- Hard Drive: 500GB, SATA
- Rack-Mountable (1U) Form-factor
- Windows 2008 R2 Embedded OS

### Benefits

- Simplified deployment as Windows OS is pre-installed and the server is pre-configured and pre-tested for use with ShoreTel Director software.
- Superior supportability as a complete ShoreTel system, including the server, is supported directly by ShoreTel.

## ShoreTel Web Dialer

Businesses that rely heavily on web interfaces for research, sourcing materials, telemarketing, and customer care will find a variety of uses for the ShoreTel Web Dialer. You can even take a simple spreadsheet, save it in Excel as an HTML file and, thanks to the ShoreTel Web Dialer application, create a dial-able online directory.

### Benefits

- Phone numbers are automatically highlighted on every web page browsed using Microsoft® Internet Explorer®
- One mouse click dials the number
- The application runs transparently until it is turned off
- A variety of number formats, including International numbers, are supported

With ShoreTel Web Dialer, ease of use translates into bottom line savings. Eliminate incorrectly dialed numbers. Save seconds every time you dial a call, minutes per week, hours per year and multiply the dollar savings across the number of people on your staff making outbound calls.

## ShoreTel Application Dialer

### Overview

- Supports easy dialing from any Microsoft Windows application that supports “<ctrl> + C” copying of selected text.
- Simply select phone number text, then press a hot key or click the AppDialer icon.
- Compatible with Microsoft Office Applications such as Word, Outlook, Excel, and PowerPoint.
- Allows individual users to optionally override Caller ID for their outgoing calls.
- Client software loaded on user desktop machines.

### Benefits

- Lightweight, automatic, and generic “works everywhere” solution.
- Extends ShoreTel’s reach to the desktop.
- User friendly – Keyboard centric users can define their own hot keys.

## ShoreCare® Partner Support

Partner Support provides fundamental service components to channel partners that prefer to provide their own branded services and to support their customers directly.

Partner Support provides ShoreTel Partners with backup services in three critical areas: telephone technical support, hardware replacement, and software upgrades. Partners purchase a separate Partner Support Agreement for each customer that is covered. Partners that choose Partner Support typically add additional services, like training, to create a post-implementation package that they brand, market and sell to their customers.

### Partner Support versus the Enterprise Service Program

ShoreTel strongly recommends that a post-implementation service agreement be part of the complete solution that is offered to customers and is discussed early in the sales process. Based on the partner’s business model they can either purchase Partner Support and be responsible for service delivery to the customer, or they can resell ShoreTel’s Enterprise Service Program to the customer in which case the customer calls ShoreTel when they need assistance and ShoreTel delivers the service. In either case the partner purchases an annual contract that is tied to a named account. Both Partner Support and the Enterprise Service Program include telephone technical support, advanced hardware replacement and software upgrades. In addition to these services the Enterprise Service Program also includes access to the ShoreCare web portal as well as web-based instructor-led administrator and end user training.

### Telephone Technical Support

Partners that purchase partner Support own the customer relationship. The partner takes the customer calls and troubleshoots the problem. If the partner needs to escalate, ShoreTel technical support engineers are ready to answer questions 24 hours a day, seven days a week via a toll-free phone number so that the partner can quickly respond to the customer. Non-urgent questions can be submitted on-line and are responded to within 24 hours.

### Hardware Replacement

Advanced hardware replacement is vital to minimizing the customer’s business-crippling downtime. In the unlikely event the partner’s customer experiences a hardware failure, the partner’s on-line request for a ShoreGear switch is immediately logged and shipped for next-business-day delivery to the address the partner designates. ShorePhone telephone replacements that are covered under contract receive the same advanced shipment attention but are sent via ground delivery.

### Software Upgrades

Software updates and upgrades keep customers on the leading edge of technology. When new software is released, the detailed notes explaining the new features help the partner decide the best time to upgrade the customer. Software files and documentation can be downloaded, at the partner’s convenience, from the ShoreTel web site and

distributed to customers under the terms of the current Partner Support Agreement. ShoreTel's technical support team is available to answer any partner questions that may arise regarding upgrades.

**Benefits include:**

- Telephone technical assistance 7 x 24 for the partner to ask questions regarding customer situations that the partner is troubleshooting
- Advanced exchange, next-business-day delivery for ShoreGear® switches
- Advanced exchange, ground delivery for covered ShorePhone™ IP telephones
- Software documentation, patches, updates and upgrades

**Partner Support Requirements**

Partner Support requires the partner to be the face to the customer, accepting full responsibility for the support relationship. Partners that purchase Partner Support must be able to take the first call for technical assistance, manage the troubleshooting and respond to all requests for hardware replacement and software updates.

Service Programs Comparison Chart

ShoreCare Service Feature	Enterprise Service Program	Partner Support	Product Warranty
	All services are delivered to the customer by ShoreTel	All services are delivered to the customer by the partner. A Partner Support contract must be purchased for each customer that is supported by the partner	Services covered under warranty are delivered to the customer by ShoreTel
Telephone Technical Support	Customer access to ShoreTel's Technical Assistance Center 7 x 24 via a toll-free phone number. Calls are handled live from ShoreTel's Technical Assistance Center in California from 11 PM Sunday Pacific Time until 11 PM Friday, Pacific Time. Calls placed between 11 PM Pacific on Fridays and 11 PM Pacific on Sundays are returned within one hour.	Technical support access is exclusively for the partner. Response times are the same as the Enterprise Service Program.	Warranty does not include telephone technical support.
Hardware Replacement	Hardware replacements are shipped upon request for next-business-day delivery. Telephones that are covered under contract are shipped upon request via ground delivery.	Hardware replacement time frames are the same as the Enterprise Service Program. The Partner designates the destination (partner or end user) on a case-by-case basis.	Product must be returned to factory for repair/replacement with reasonable efforts return delivery.
Software	Published patches, fixes, updates, upgrades and documentation are available for download from the ShoreTel web site.	The Partner has access to published software and documentation that is then provided to the customer based on the terms of the current Partner Support Agreement.	Software is warranted to perform as sold. ShoreTel will provide a patch in the event a bug is discovered in the version purchased.
Training	Eight seats in ShoreTel's web-based, instructor-led the System Administrator course. Sixteen seats in ShoreTel's web-based, instructor-led the end user training course.	Partner training is covered in the ShoreTel Reseller Agreement. No additional training for the partner or end user is included as part of Partner Support.	No training is included in the product warranty.
Web Services	Customers are provided password access to the ShoreCare Web portal and locked documents. Customers can submit and manage hardware replacement and technical support cases on-line.	The partner is provided access to the ShoreCare Web portal and locked documents. Partners can submit and manage hardware replacement and technical support cases on-line.	Only the public areas of the ShoreTel web site can be accessed.



## Schedule of Equipment and Services

Pricing excludes taxes and is valid until 12/29/2016.

Qty    Part Number

### ShoreTel

1	29152	ShoreTel 14.2 Software (General Release)
1	10481	Sm. Business Edition 100, Analog Trunking 20 User With Server
1	10322	ShoreGear T1k
20	30035	Extension & Mailbox License
3	30039	Extension-only License
14	40005	ShoreWare Personal Communicator
5	10429	ShorePhone IP655 W/Anti-Glare (Requires ShoreTel 11.1 or later)
35	10496	ShoreTel IP Phone IP480
1	10384	Start Kit: IP930D DECT Phone (Includes Base, Handset&Charger) - Requires ST 14 or later
3	10389	Handset: IP930D Dect Phone (Add-on) - includes handset charger - Requires ST 14 or later
1	10382	IP655 IP Phone Quick Reference, Doc. Pack, Qty 25
2	10503	ShoreTel 480/480g IP Phone Quick Reference, Doc. Pack, Qty 25
8	30140	License, Upgrade from SIP Trunk Lic (SKU 30043) to Virtual SIP Trunk Lic
15	30137	License, Virtual SIP Trunk QTY 1

### Miscellaneous

1	48353-203	Chatsworth Rack 19" x 7', White
1	CFR1000	Alpha CFR 1000 UPS
1	10814-201	Power strip 19", White
1	MDF	MDF materials

### Services

94111	Partner Support (1 Year, No Phones)
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### Installation and Design

Labor-Phone	Implementation & Design
Labor-Advanced	Advanced Implementation & Design
Labor-PM	Project Management

### Training

Labor-Training	User training
	Phone set training for 44 users
	5 classes, 1 hr/class, max 10 attendees/class
Network Assessment	Network Assessment

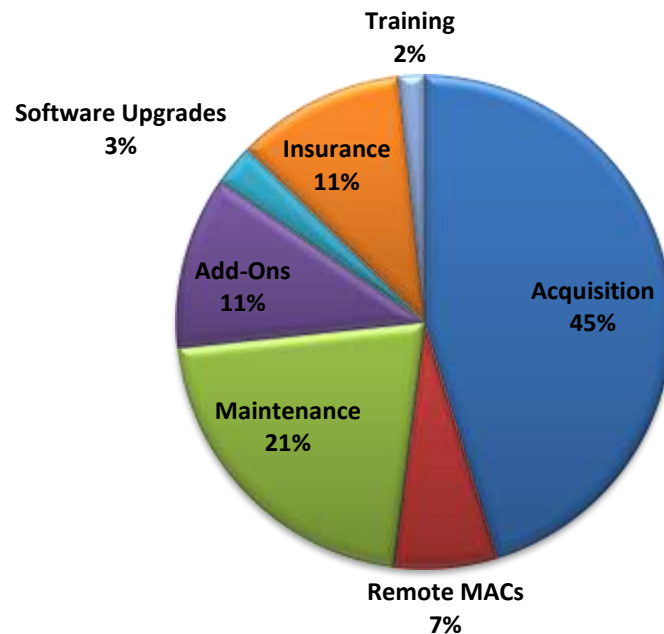
### First Year Support

PartsWarranty	1st Year Parts Warranty
Support8X5	1st Year 8x5 Labor Support

## Managed Services Program

The goal of our Managed Services Program is to provide full support of your company's communications needs in the future as well as today. We offer you access to a comprehensive service and support program called the Managed Services Program.

When you purchase or lease communications equipment, you assume the risks and responsibilities associated with ownership and operation of that system. The Managed Services Program considers all the costs associated with the operation of your communications system and protects you from the risks and uncertainties associated with ownership and management of advanced technology. Outsource your telecommunications to us and focus your attention on your business, secure in the knowledge your requirements for an effective telecommunications system are being met, both now and in the future.



If you purchase or lease a system, it is important for you to also consider all the costs to operate your system, not just the purchase price. In many cases these costs can ultimately equal or exceed the original acquisition cost, as the above chart illustrates for the proposed solution. With our Managed Services Program, you will know exactly what it will cost you to maintain, operate and expand your system. These costs remain fixed for up to eight years, regardless of fluctuations in the cost of equipment and labor, effectively ensuring your investment protection!

## Managed Services Program Benefits

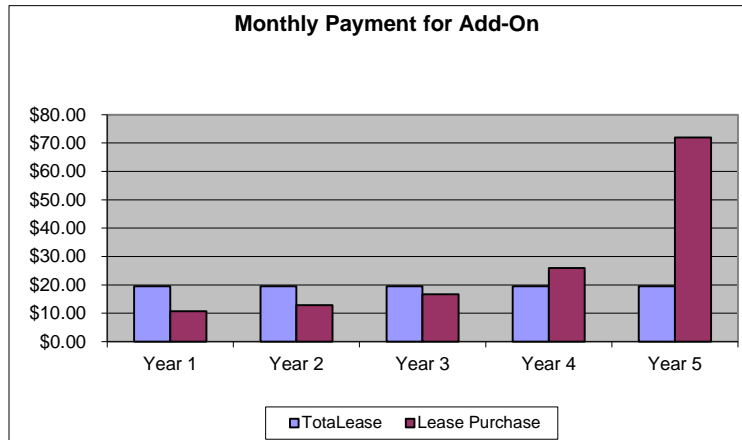
### Full Service and Warranty

Your fixed monthly payment includes full service, parts and labor for the full term of your lease — and the renewal term. When you sign your Managed Services Program contract you know exactly what service will cost, without escalation, for up to eight years.

### Guaranteed Rates for Expansion



You are provided with a list of common expansion equipment that can be added to your contract, at any time, at a fixed monthly rate. The monthly rate, which includes all installation charges, maintenance and other Managed Services Program provisions, remains regardless of the cost of equipment, labor, interest or even the number of months remaining on your contract, for up to eight years. When you add conventional lease contract, the lease company will calculate the monthly rate based on the current interest rate and the term remaining on your contract.



This chart above shows the effect of adding a phone midyear in each year of your contract. For this example, the purchase price is \$413. In a traditional lease purchase, as the remaining term decreases, the payment added to your lease payment increases from \$10.77 to more than \$70 per month. The Managed Services Program fixed monthly rate is \$19.52. The Managed Services Program rate does not change even as the end of the term gets closer.

#### Upgrade & Recast Flexibility

The day you purchase or lease a system, you lock yourself into that system's capacity and technology. The Managed Services Program protects you from obsolescence and the risk involved with potentially upgrading the system in the future as your company grows and market conditions or technology change. At any time after the first two years of the contract, should you need a new system due to growth or technological advances, you can upgrade to a new system with no payoff or penalty relating to the first contract. The first contract is forgiven in its entirety.

Should you wish to upgrade in the first two years, you will only be responsible for the difference between the payments you have made and 24 payments. This difference will be included in your new upgrade contract so there will not be any out-of-pocket expenses. In addition, should you elect to add a substantial amount of our equipment to your system; we offer the ability to recast your Managed Services Program to minimize the impact on your monthly payment.

#### System Software Upgrades

Any time during the term of the Managed Services Program, you can request to upgrade to the latest production level of our advanced communications platform software at no additional charge. There is no limit to the number of times you can upgrade during the term or renewal period. This includes the communications platform software and the labor to install the software in the then current configuration.

#### Risk of Loss Coverage

On average an insurance policy charges over \$70 per month to insure a \$50,000 system. Additionally, all commercial insurance policies have deductibles. So, in many cases, you have no insurance at all. With the Managed Services Program, we assume risk of loss for the equipment and the software for the full term of your agreement. No additional insurance is required. You pay no deductibles in the event of a loss. This includes software viruses which no commercial insurance policy will cover. You will not invest your valuable time or money filling out insurance forms or dealing with adjusters. Your equipment, system or software is replaced immediately at our expense.

#### Disaster Recovery Provision

A current copy of your system database will be maintained off-site. Should you have a catastrophic loss, the system and software are immediately replaced under Risk of Loss and, with the current database maintained off-site, your system can be re-installed, reprogrammed and back in operation as quickly as your environmental conditions permit.

#### System Training

What good is advanced technology if no one knows how to use it? With the Managed Services Program, we provide training on the use of your system to all of your employees throughout the entire term of your agreement. Any time you add new employees; or should someone just need a refresher course, simply pick up the phone and call us.

#### Discounted Adds/Moves/Changes

Additional discounts will also extend to changes you may want to make to your system that do not appear on the list provided on the Guaranteed Rates for Expansion provision.

#### Guaranteed Renewal Options

Upon completion of the Managed Services Program contract, you will be given the option to renew for an additional 36 months at 50 percent of the rate you had been paying. All the benefits from your original contract are locked-in for up to eight years!

### Investment Option

**MONTHLY TOTAL INVESTMENT ..... \$1,086.00**

### Cash Purchase vs. Managed Services Comparison

	<b>Cash Purchase</b>	<b>Managed</b>
Purchase Price	\$36,009	
Monthly Fee		\$1,086
Agreement Period Months		60
Total Managed Services Payments		\$65,160
On-Site Maintenance/Support (24x7x365)	\$14,403	✓
<b>TOTAL AFTER 60 months</b>	<b>\$50,412</b>	<b>\$65,160</b>
<b>ADDITIONAL BENEFITS</b>		
Risk of Loss Insurance (at \$1.50 per \$1000/mo.)	\$3,241	✓
Insurance deductibles paid over 60 months	\$5,000	✓
Remote MAC Labor	\$5,401	✓
Software Upgrade Labor (assuming 1 upgrade/year)	\$2,160	✓
Unlimited Training (assuming 2 hrs training/year)	\$1,350	✓
Add-Ons (incl. maintenance & insurance)	\$12,009	\$9,779
Fixed Add-On Pricing	-	✓
No Penalty Upgrade to New Technology	-	✓
30% Move Discount	-	✓
50% Renewal Rate	-	✓
Flexible Recast of Finance Options	-	✓
Return on Available Cash (at 8%)	-	-\$14,403
<b>Cost of Ownership After 60 months</b>	<b>\$79,573</b>	<b>\$60,536</b>

## ***Pricing and Assumptions***

Pricing is based on details provided during meeting(s), telephone calls, and correspondence with Holiday Products representatives.

Implementation pricing is based on one (1) continuous phased installation

Upon award of contract, a Statement of Work (SOW) will be required. The Statement of Work describes and defines Seller's requirements, Seller's responsibilities, Prerequisites and Conditions and Terrific Tech deliverables

Pricing is exclusive of all applicable taxes unless noted and is valid for ninety (90) days from the date of quotation.

Implementation activities/training will be performed during regular business hours (8 a.m. to 5 p.m. local time). The final cutover will be performed at a mutually determined time to minimize interruption and possible down time to the customer's operations. All work can be performed after-hours if required, but pricing may be affected.

All information provided by customer is assumed to be accurate and complete. Incorrect and/or incomplete information may cause changes in scope and costs to be required.

All configurations and specific applications as determined with End User are technically sound and are reviewed and approved by qualified, certified engineering staff.

If applicable, Terrific Tech will work with customer's IT group to design the data network to support V-LANs and QOS to deliver a functional Voice over IP (VOIP) solution. If Customer is providing the data switches, then Layer 3, commercial grade POE switches are required with CAT 5 or 6 cabling (installed to BICSI Standards) at the location for each IP Phone.

End User has been provided with all power and environmental specifications, server and client PC hardware & software specifications, LAN requirements and other pertinent information regarding the implementation of the equipment sold.

Project Management will be handled by Terrific Tech.

## **Comprehensive Ongoing Support - Terrific Tech Support Plan**

Terrific Tech supports Customers the way they want to be supported, with the products they have! Using Terrific Tech as your single point of contact for multi-vendor maintenance services increases your communication network functionality and reliability. The Advanced technical resources of Terrific Tech delivers fast, consistent support 24 hours a day, seven days a week, 365 days a year to help keep your operations running at peak efficiency. Terrific Tech supports customers the way they want to be supported, with the products they have.

### **Advantages of Terrific Tech Services**

- A single point of contact for efficient maintenance of multi-vendor environment
- Options that fit the parameters of your current staffing, operations, and expertise
- Expertise to maintain your communication system and vital business functions.
- Cost effective service / MAC rates.

### **All Communication Service Offerings from Terrific Tech are backed by:**

- The Communication Service Center (24/7)
- Field-deployed technicians
- In-House Inventory of Spares with National parts availability
- Implementation and Service labs backed by our Manufacturers Technical Support Centers.

### **Terrific Tech Comprehensive Support Plan Plans include:**

- 7x24x365 Service
- Priority Queue for Service and MAC Requests
- Priority Emergency Response - 2 hour or less Target
- Priority On-site Non-Emergency Response -16 business hour Target
- Out of Hours Support
- 10% discount on Billable services such as Move, Add, and Changes
- Unlimited Service Calls and Help Line Support
- **Repair or Replacement for Lightning Damage/Power Surge**
- Line Fault Isolation Coverage
- Operator or End-User Training
- Routine Remote Programming (Onsite work to complete anything started remotely is billable)
- Labor for Software updates *(with software assurance if applicable. Does not include any additional hardware that may be required.)*
- Remote telephone support to facilitate trouble reporting, problem diagnosis, and resolution and to answer your questions about product features and functions

## Implementation Plan

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Upon receipt of approval for funding of the desired solution, Terrific Technologies, Inc. will assign an internal Design Specialist, DS, to manage the project. The DS will be responsible to work on behalf of Terrific Technologies to be the customer facing contact for Terrific Tech and interact between the customer and the Terrific Tech Implementation Team. The Terrific Tech DS will also assist in the process of gathering final programming information from the customer in order to facilitate a successful implementation for any solution.

The following are implementation steps that will be included in this project. A sample Project Timeline has been included in this proposal for your review as well:

- **Documentation & Data Review** - After contracts are signed we would immediately compile a job package with specific data regarding each phase of the operation. We then would have an internal briefing with the designated project team. This information, including: data network diagrams, specific client request, time-lines, working conditions, etc., would be disseminated to the entire team and tracked throughout the project.
- **Initial Client Meeting** – After our internal briefing, a client meeting would be held to review the entire scope of the project and clearly identify specific time-lines and work criteria.
- **Customer Programming & Data Switch programming Assessment** – Time-line's for this (these) meetings stem from the initial client meeting and may need to occur with multiple departments to gather specific call programming information. This is also a very good time to present features/options to specific groups or users to fully utilize the robust features of the purchased solution.
- **Update / Assessment Meeting(s)** – Throughout the project it may be useful to have updates on project activities, time-lines and upcoming phases.
- **Training Sessions** – Training is customized to your specific needs and can be done by classroom, small group settings or individually depending upon each department's needs. Additional training is also offered within a few weeks of the final implementation to insure acceptance and understanding of the new system as well as bring any new employees up to speed. Optional Training for System Administrators is also specialized for you. Additional user training is always available.
- **Cut-over** – The exact time your new solution is officially brought on line.
- **Follow-up Training and Assistance** – The Implementation team will be on your site the next business day following the cut-over to insure a smooth transition and to assist any users with additional training and minor changes.
- **Further Review and Assessment of clients' needs** - Terrific Tech recommends a follow up assessment and possible training time for you. This insures that features purchased with the original investment, are being utilized to their fullest extent. It also allows your staff to have time to identify any changes that may further improve the Implementation.
- **Final Post Cut-over Meeting** - At this time we will have a final sign-off of the project/phase as contracted and move into the system warranty phase.

## Project Timeline

<b>Customer Name:</b>		<b>Holiday Products</b>		
<b>Requested Installation Date (Cut Date):</b>		<b>12/21/2016</b>		
<b>Task</b>	<b>T - (Cut Date)</b>	<b>Responsible Party(s)</b>	<b>Due Date</b>	<b>Comments</b>
Telco Orders Placed (If Customer Ordered, Supply Copies)	-30	End Customer	11/9/2016	
Current Network Diagram	-15	End Customer	11/30/2016	
Current Network Info	-15	End Customer	11/30/2016	
Equipment Order Date	-15	Terrific Tech	11/30/2016	
POE Switch Deployment	-13	Terrific Tech	12/2/2016	
Telco Confirm Router Configuration	-12	Terrific Tech	12/5/2016	
Telco Confirm Router Configuration	-12	Terrific Tech	12/5/2016	
System Data Gathering Customer Meeting	-10	Customer & Terrific Tech	12/7/2016	
Customer Floor Plan Received	-10	End Customer	12/7/2016	
Pre-Install Network Assessment Date	-10	Terrific Tech	12/7/2016	
Import Spreadsheets Complete	-10	End Customer	12/7/2016	
Network Assessment Passing Score	-7	Terrific Tech	12/12/2016	
Network Configuration Complete	-7	End Customer	12/12/2016	
Power Requirements Met	-7	End Customer	12/12/2016	
Environmental Conditions for Customer Site Met	-7	End Customer	12/12/2016	
Environmental Conditions for Customer Site Met	-7	End Customer	12/12/2016	
Equipment Delivered to Customer Site	-5	Terrific Tech	12/14/2016	
Network Configuration Verified	-5	Terrific Tech	12/14/2016	
Telco Delivery Date	-5	End Customer	12/14/2016	
Cabling Complete	-5	End Customer	12/14/2016	
Change Order Freeze (5 working days prior to cut)	-5	End Customer	12/14/2016	
Software/Programming Freeze (5 working days prior to cut)	-5	End Customer	12/14/2016	
Go/No Go Decision Date	-5	Customer & Terrific Tech	12/14/2016	
System Installation & Programming	-3	Terrific Tech	12/16/2016	
Remote Access	-2	End Customer	12/19/2016	
Designated User Training	-2	Customer & Terrific Tech	12/19/2016	
System Performance Test	-1	Terrific Tech	12/20/2016	
Operator Training	-1	Customer & Terrific Tech	12/20/2016	
System Cut Over	0	Terrific Tech	12/21/2016	
Post Cut Over Support	1	Terrific Tech	12/22/2016	
Delivery & Acceptance	1	Terrific Tech	12/22/2016	
Turnover to Service Department	2	Terrific Tech	12/23/2016	
Post Install Network Assessment	10	Terrific Tech	1/5/2017	
<b>Customer</b>		<b>Date</b>		