



PHOENIX 2.0

IT WITHOUT THE DRAMA

Company Overview

Confidential Information

Our Story

Started in 2001 - Staffing and Strategic Projects
Expanded into MSP in 2010 - Came together to do MSP better



Bill Dwyer

40+ years in IT professional services, former CEO of TAOS. CFO Sterling Federal Systems
Former CEO, Advisor



Jared Pickering

Former Managing Dir. HP, SVP BD, Finance and Administration DHL, Senior Auditor Ernst & Young
CTO/Service Director – Managed IT Services




John Sedivy

SVP TAOS West Coast, Astreya
Principal – Technology Staffing Services

Phoenix 2.0

Managed Information Technology Company

- Managed IT Services – Day-to-day IT support, winning at due diligence and M&A
- Managed Cyber Security – Managing cyber and technology risk, protecting your strategic assets
- Staff Augmentation & Strategic Projects – leveraging the innovation landscape through top level talent on a fractional basis



PHOENIX 2.0, INC.
HOW TO CONTACT IT FOR SUPPORT
FOR FASTEST RESPONSE: SUPPORT@P20INC.COM
HELP DESK: 855-211-1820, AFTER-HOURS
SUPPORT CHOOSE OPTION 2

WWW.P20INC.COM
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Why Outsource IT

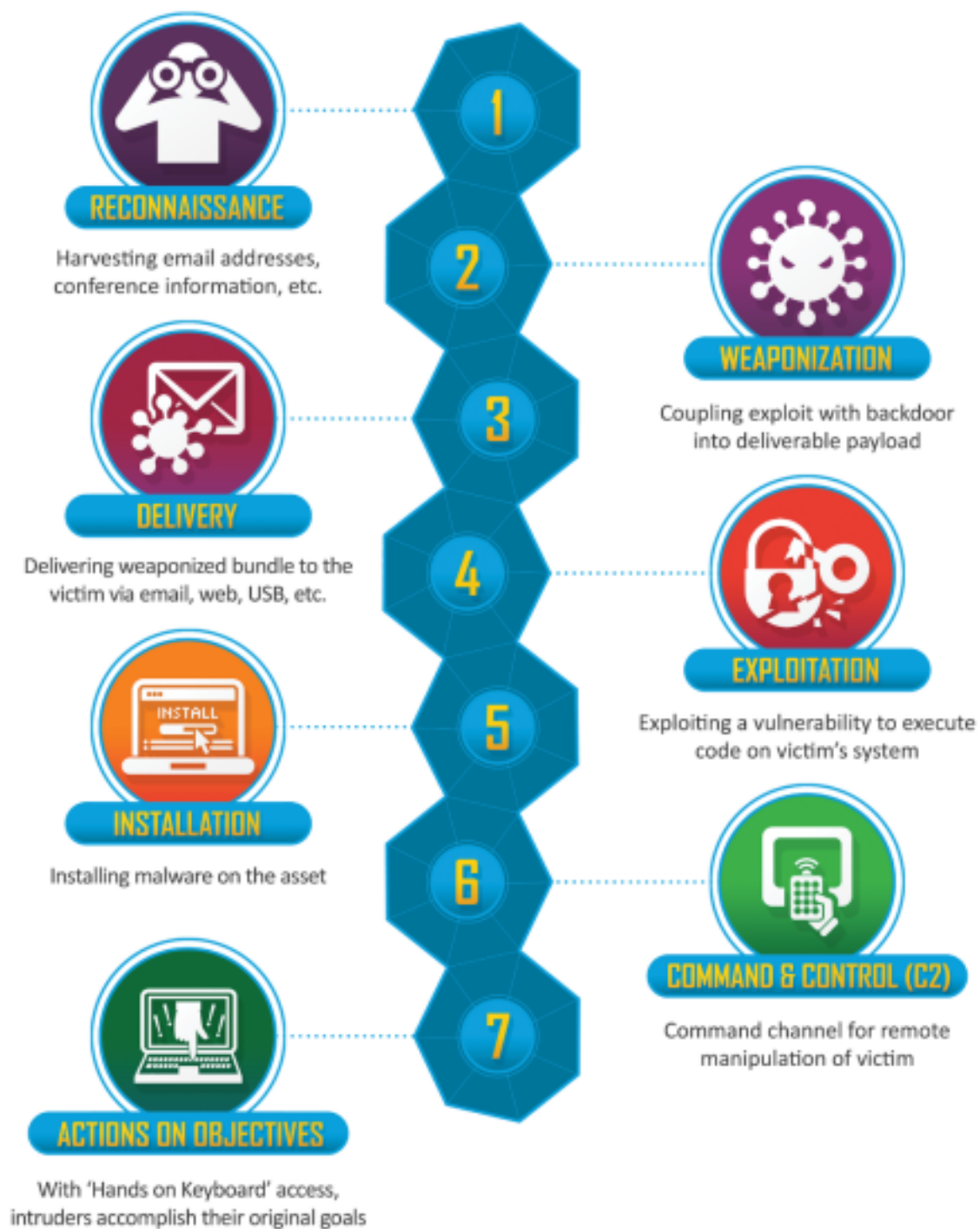
- **Team approach** – variety of skill sets, from desktop support to CIO, for fraction of FTE costs, IT “off your plate”
- **Cyber Security & Privacy Laws** – CYA
- **Alignment on Productivity and Efficiency** – We loose money when your IT doesn't work
- **Minimizes Due Diligence Scrutiny** – ability to provide answers and documentation quickly and comfortably
- **Phoenix 2.0** – “responsive, reliable, consistent, flexible, expert knowledge and management by a team who cares about client relationships”
- **Assessment Process** – Documentation and Roadmap deliverable, steady state and roadmap based on tech comps across the competitive landscape. Hardware, Software, Device and Mobile (portability), Data Analytics

“Since we hired Phoenix 2.0, we spend less time spent on IT. We’ve been able to offload support and now the environment is more streamlined and stable”

1.Reusing passwords to your systems on other platforms in their personal life

2.RansomWare – user clicks on phishing email which locks up your QB DB, Fileshare or entries/files in Jobs platform for ransom

3.Server access exposed to the Internet



Buy/Sell Side Due Diligence

- Proven Process and Results (Med Device, Prof. Services, Food & Bev, Retail)
- Report for Buy or Sell Side Acquisitions to support your Acquisition Thesis – data driven decision making
- Technology Platform review – removing roadblocks to growth and stability
- Cyber Risk Assessment – no surprises during due diligence, data (project plans/IP/client info, employee info/hiring docs, financials, payroll, vendor/third-party) are safe
- Data Analysis – Business Intelligence and dashboards for real-time decision making
- Integration Roadmap – VEP slide/easily repeatable process

Due Diligence Assessment Process Buy or Sell

P.A.S.O.G.

People interact with
Applications, which live on
Systems, which run the
Operations, which are
Governed by rules

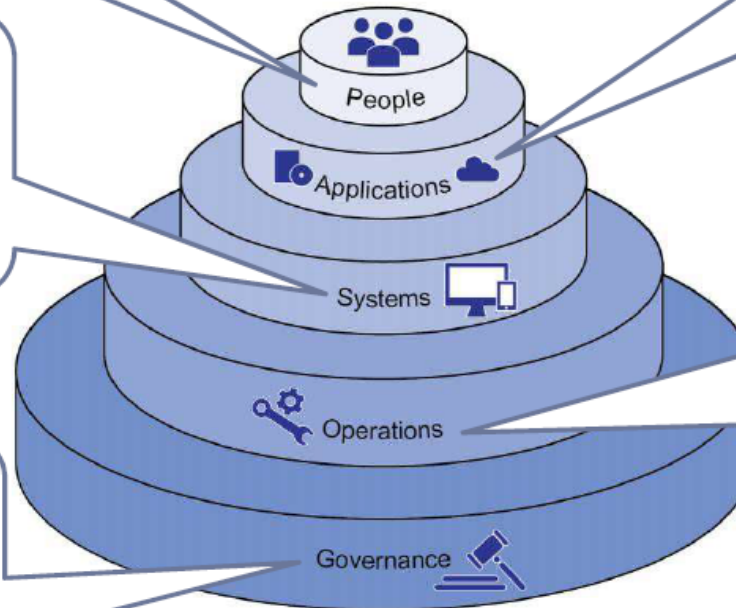
- What is the organization's growth plan-Organic or by Acquisitions?
- List of Departments and functions / User groups / Responsibilities /Business and Tech Stakeholder interview

- E-mail/Communications
- Sales/CRM
- Finance/Financials
- ERP/Operations
- Collaboration/Sharing

- Network
- Servers/Storage
- Printers
- PC/Mac/Mobile Devices
- Telecom
- Security

- Sites / departments
- Process
- Timelines / schedules
- Vendors/Logistics
- Budgets
- Metrics

- HIPAA / PCI / ISO / SOX/ITIL-ITSM
- Technology committee or board
- HR - Employee Handbook/Acceptable Use Policy/Data Retention



Getting to a Steady State

Future state/roadmap

VEP Framework



- **Vision** – Business & IT Strategy
- **Environment** – Apps, Architecture & Skills
- **Process** – Governance, Execution & Tactical Operating Structure

Deliverables:

Current State Assessment
+ Gap Analysis (SWOT)
+ Future State Vision

= 3 Year IT Roadmap / Strategy

Establishing the Platform

Service Automation Platform (Quote, Schedule, Dispatch, Invoice, CRM) dictates other decisions: e.g. email, file sharing, MDM (mobile device fleet & management) etc.



Make a decision

Make a decision

- You acquire – build your platform so that you can roll up or integrate easily
- Getting acquired – clean up, eliminate blind spots and get to steady state

1. Gather Documentation
2. Network Scan/Logs review
3. Stakeholder interviews
4. Vendor and competitor landscape analysis
5. Roadmap proposal

Questions

Thank you!



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