

Marcum Technology

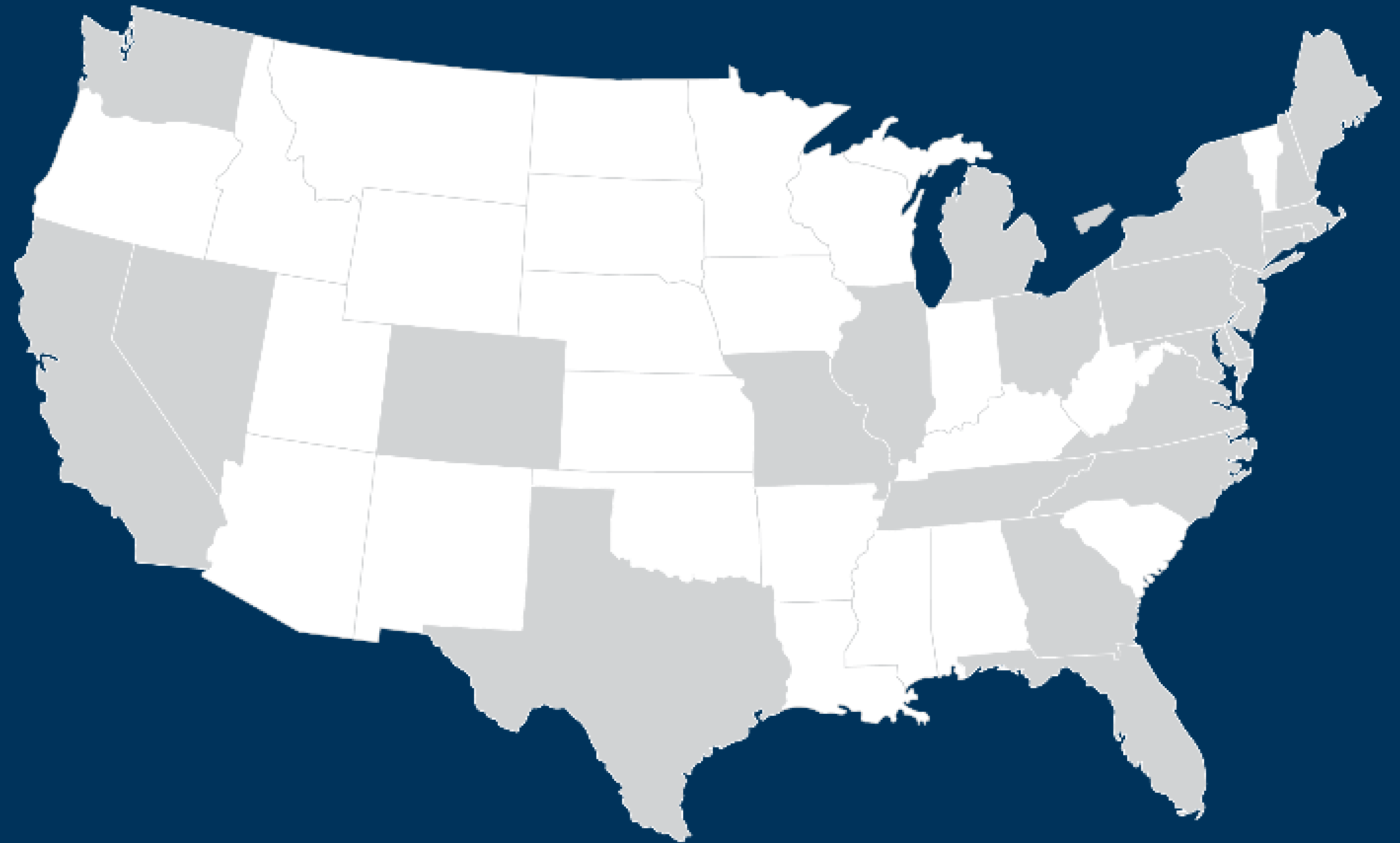
IT Assessments & Enterprise System Selections

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Marcum Technology

- Founded 2001
- 100+ associates
- Average years of experience: 15



INDUSTRIES WE SERVE

Alternative Investments

Broker Dealers

Cannabis

Construction

Energy & Natural Resources

Financial Institutions

Food & Beverage

Government

Healthcare, Life Sciences, Biotech

Higher Education

Manufacturing & Distribution

Media & Entertainment

Nonprofit & Social Services

Private Equity

Real Estate

Retail & Consumer Products

SEC

Technology

OUR SERVICE OFFERINGS

STRATEGIC CONSULTING

MANAGED IT SERVICES

CYBERSECURITY & DIGITAL FORENSICS

DIGITAL CONSULTING

CLOUD & INFRASTRUCTURE SOLUTIONS

PRODUCTS & SOLUTIONS POWERED BY MARCUM TECHNOLOGY

- **IT Assessments**
- Digital Transformation
- **Enterprise System Selection**
- IT Due Diligence
- IT Strategic Planning
- IT Modernization
- Post Deal Value Creation
- IT Operations Restructuring & Business Result Alignment
- **IT Staff Augmentations**
- Managed Service Provider
- Business Continuity as a Service
- Remote Service Desk
- Co-Managed Services
- Managed NOC
- Cybersecurity & Privacy Services
- Disaster Recovery
- Cyber & Digital Forensics
- vCISO/CISO as a Service
- Cybersecurity Due Diligence
- Cyber Security Governance & Engineering
- Assessments, Penetration Tests
- **Managed vSOC**
- Intelligent Automation (RPA/AI/ML)
- Data Analytic & Insights
- Blockchain & Cryptocurrency Services
- Application Development
- Financial ERP Solutions
- FP&A Solutions
- Technology as a Service
- Infrastructure & Projects
- Project Management
- Telecom Optimization
- Cloud Services
- Value Added Reseller
- Small Business Solutions (SMB)
- 1099-Prep.com
- **Intelligent Prism**
- Sales & Use Tax Automation
- Marcum Cloud Services

Issues Driving IT Assessments

- Recent cybersecurity hack or ransomware
- No strategic IT leadership
- Applications are old / outdated
- Infrastructure is old / outdated / end of life
- Too costly or limited investment
- No backup / disaster recovery plan



Assessment Key Areas

Provides a deep and meaningful view of the client's state of IT operations and technology – helping them with architecting their digital future comprehensively

IT Organization

Cybersecurity

Infrastructure

Vendors & Contracts

Applications

**Governance, Policies &
Procedures**

**Strategy, Budgets, Spend &
Projects**



IT ASSESSMENT SAMPLE APPROACH

Assessment & Analysis IT Operations

- Establish Organization Strategic Objectives
- Conduct deep dives in the seven domain areas
- Generate SWOT analysis
- Benchmark finances
- Generate Findings report

Conduct Technical Environment & Cybersecurity Review

- Survey data center for connected devices and configuration
- Survey data center for cybersecurity vulnerabilities, risks and issues
- Generate network reports
- Update draft Findings and Recommendations report

Conduct Application Review

- Conduct application working sessions (e.g.):
 - ERP system
 - Financial system
 - Document management system
 - Marketing / CRM
 - eCommerce
 - Office tools
- Update draft Findings and Recommendations report

Develop Findings Report & Strategic Roadmap

- Develop Strategic IT Roadmap to align IT to business objectives, including:
 - Projects
 - Timing and sequencing
 - Resources
 - Investments and business case
- Finalize Findings and Recommendations report

Issues Driving Enterprise System Selections

- Multiple versions behind / older technology
- Limited integration and manual data updates
- Poor / limited reporting and data analytics
- Expensive maintaining on-premise systems
- Limited to no security
- System complex / cumbersome to use



Key System Areas

- Enterprise Resource Planning (ERP)
- Financial Management Systems
- Marketing / CRM
- eCommerce / Point of Sale (POS)
- Grants Management / Donor Management
- Industry specific solutions (Legal, EHR, Property management, WMS, etc.)



ENTERPRISE SYSTEM SELECTION

ASSESSMENT & ANALYSIS



- Establish Organization Strategic Objectives
- Conduct detailed walk thru of the processes and the existing system(s)
- Generate SWOT analysis
- Develop application requirements documents
- Create a high-level draft of findings

VENDOR IDENTIFICATION / RFP



- Develop RFP with application requirements
- Select vendors / implementation partners to receive RFP
- Manage vendor questions & discovery sessions
- Analyze responses and recommend vendors for demos
- Develop vendor scripts

VENDOR DEMOS & SELECTION



- Facilitate demos with scoring
- Update Findings report based on vendor demos and scoring
- Reach agreement on preferred vendor
- Conduct vendor contract negotiation
- Acquire preferred vendor updated price quote
- Vendor selected
- Delivery of final report

Key Contacts / Critical Symptoms

Key Client Contacts:

- Owner
- President
- CFO
- Controller
- Operations Lead

(Rarely is our contact an IT / technical lead – typically it's your natural contact)



Poor / unreliable data quality and reporting challenges.



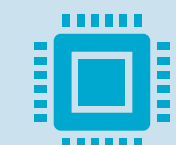
Used to outdated systems, not realizing operational efficiency potential.



IT can't deliver on-time and on-budget.



IT is transactional focused, with no strategic leadership.



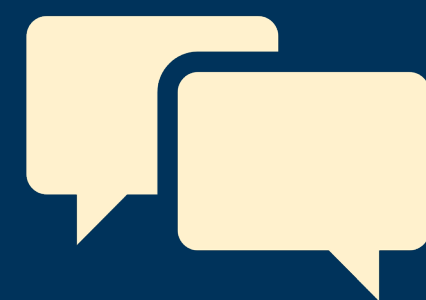
Client has experienced a cyber incident; phishing, ransomware, malware, etc.

Benefit to you / your client

Increases the value of your firm to your client, creates stickiness, moves beyond the finance discussion and learning more to growing their business and increasing profitability



Better operational efficiency across the organization



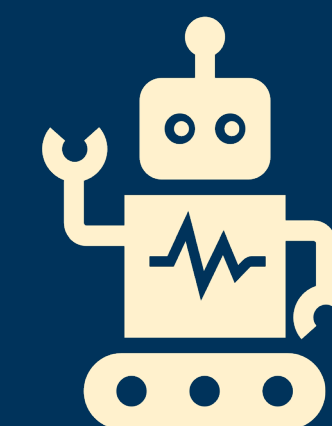
Increased communication and collaboration among teams



Better customer engagement and loyalty



More secure and protected cyber environment



Smarter business decisions through advanced technologies e.g., Gen AI/ Machine Learning, RPA etc

These projects can be conducted without jeopardizing audit independence.

Case Study: Manufacturing

Leading Producer of Flavors & Extracts

Client Challenge

- Needed to understand IT current state capabilities.
- Seeking to improve efficiencies and to modernize.
- Seeking better system integration and electronic order transmission (such as EDI).
- Needed:
 - Update its existing ERP and CRM systems.
 - Assistance with migrating to a new physical location.
 - New IT leadership.
 - Project management support.

Our Approach

- Conducted IT Assessment.
- Managed ERP and CRM software selection.
- Project managing migration of servers and network to new location.
- Facilitated search / acquisition of new IT leader.
- Program management to implement new systems.

Results & Benefits

- | | |
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| <ul style="list-style-type: none">• Findings report with strategic roadmap.• New ERP and CRM systems in progress. | <ul style="list-style-type: none">• New strategic IT leadership.• Greater alignment to business objectives. |
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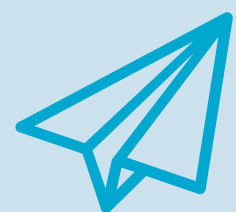
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