



Technology Business Management: The Value-Added RFP Process

Complex Problems, Simple Solutions

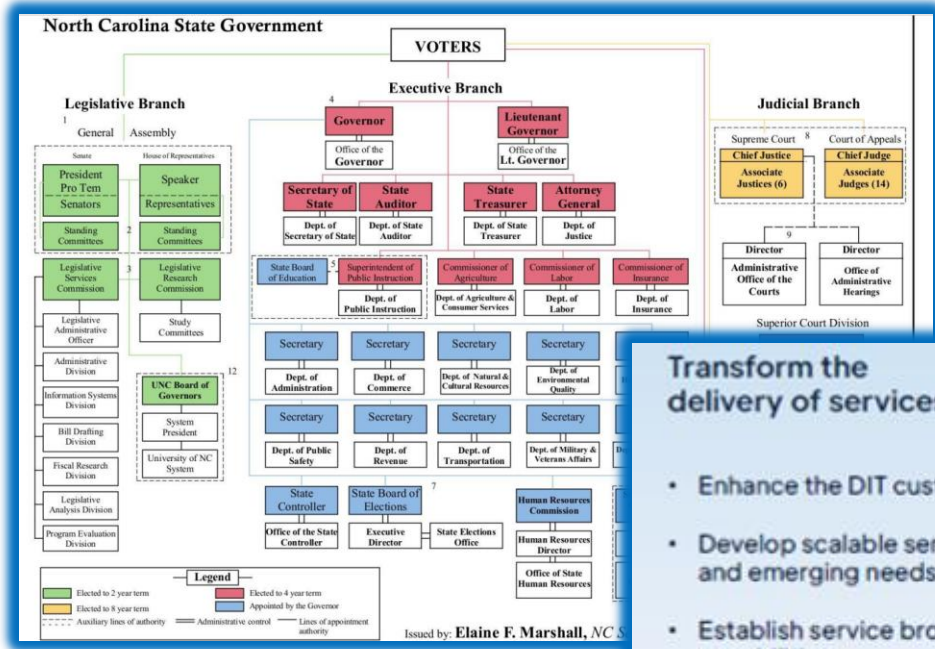
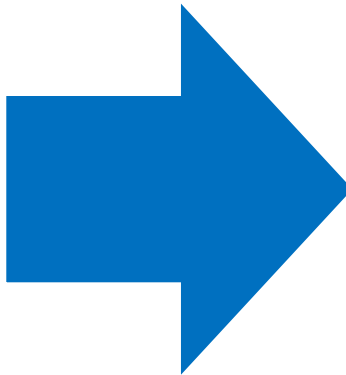
Presented by Milton McCoy

Agenda

- What you get
- Introduction
- Key Components of TBM
- Case Study
- Lessons Learned
- Q&A

Services

- Data Center Hosting
- Windows, UNIX, Linux Hosting
- Cloud Services
- Database Services
- Mainframe Hosting
- Storage and Data Protection
- Telephony
- Call Center Services
- Network Security
- LAN and WAN Services
- WAN Services
- Digital Solutions
- Testing
- Electronic Document Management
- Project Management
- End Point
- Unified Collaborations
- Identity Management



- Transform the delivery of services**
- Enhance the DIT customer experience.
 - Develop scalable services that meet the current and emerging needs of our customers.
 - Establish service broker model and supporting capabilities.
 - Enable a cloud migration strategy.
 - Simplify statewide IT procurement.
 - Improve the ability to forecast customer needs.
 - Transition to a modern authentication services to support the state's current and future needs.
 - Invest in secure, scalable infrastructure for data programs.
 - Develop and implement a new funding model for IT in the state.

- This approach is the NCDIT approach and may need to be tailored for your organization.



The Challenge

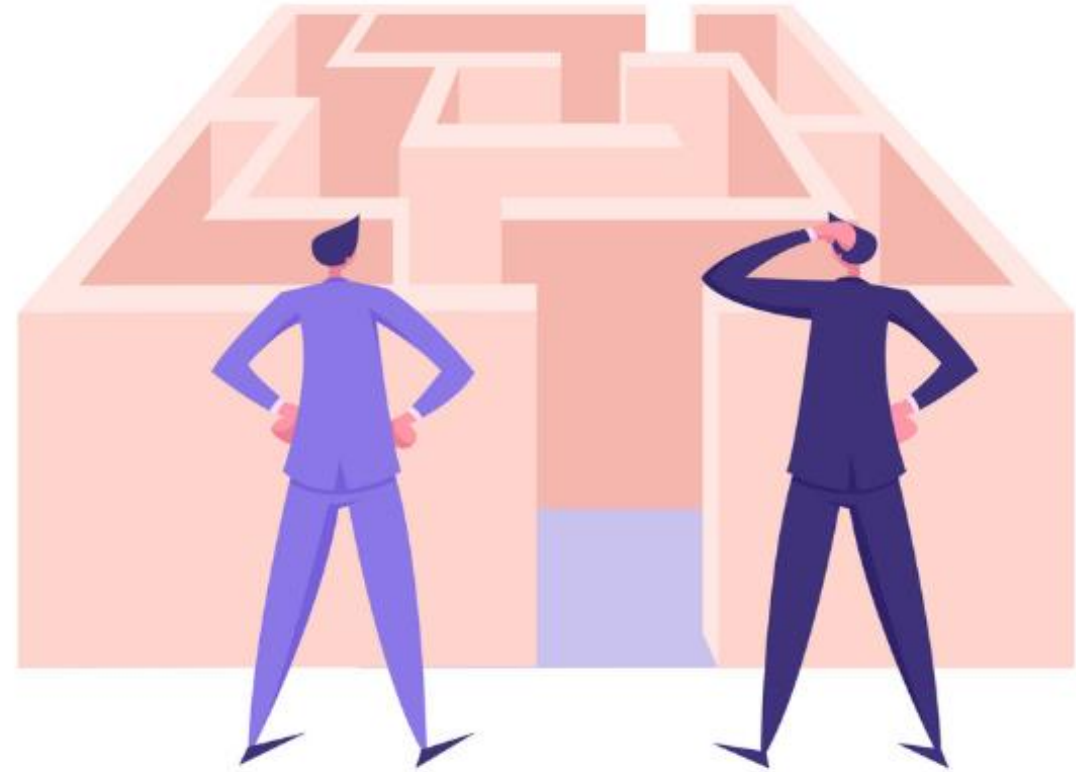
Replacing the current in-house TBM tools with 3rd party tool that delivers financial transparency, cost control, and strategic IT alignment at reasonable cost.

The Problem

Without a structured and collaborative RFP process, the organization risks selecting tools that fall short on functionality, integration, or long-term value.

The Solution

A well-designed RFP process—driven by clear requirements, stakeholder engagement, and rigorous evaluation—will ensure the selection of a TBM tool that maximizes financial and operational impact.



Poll

TBM Tool Procurement

- **My organization has no TBM Tool**
- **My organization is using a TBM Tool based on writing a RFP.**
- **My organization is using a TBM Tool, however, did not use a RFP as a method to purchase.**

What is an RFP?

The purpose of a **Request for Proposal (RFP)** is to **solicit competitive bids from qualified vendors** for a specific product, service, or solution—typically one that is complex or requires customization. An RFP allows organizations to:

1. Clearly define their needs and expectations

- Outline technical, functional, financial, and operational requirements.

2. Ensure transparency and fairness

- Standardize the vendor selection process by evaluating all proposals based on the same criteria.

3. Promote competition to achieve best value

- Encourage multiple vendors to propose solutions, fostering innovation and cost-efficiency.

4. Evaluate vendors objectively

- Compare proposals across capabilities, costs, timelines, and support to make an informed decision.

5. Mitigate risk

- Documented requirements and contractual obligations reduce the chance of misalignment or scope creep.

In essence, an RFP is both a procurement tool and a decision-making framework that helps an organization select the best-fit vendor for strategic purchases.



What is an RFP?

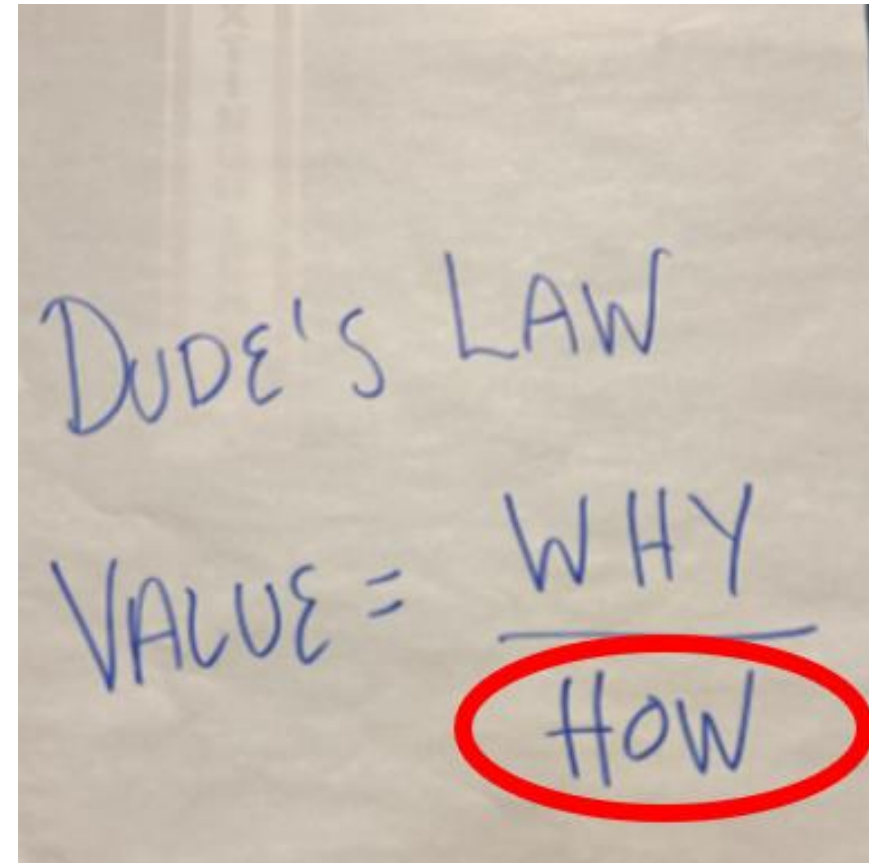
An RFP provides a structured, transparent process to identify the best vendor solution that meets an organization's specific needs while ensuring competitive pricing and accountability.

An RFP supports **Dude's Law**—**Value = (Why) / (How)**

By clarifying the "**Why**" (business need or purpose) and standardizing the "**How**" (vendor methods and solutions), enabling organizations to maximize value through informed, purpose-driven decision-making.

In other words:

- The RFP defines **why** the solution is needed (goals, problems to solve).
- It compares **how** different vendors propose to meet that need.
- By evaluating both sides, you can choose the option that delivers the most **value**.

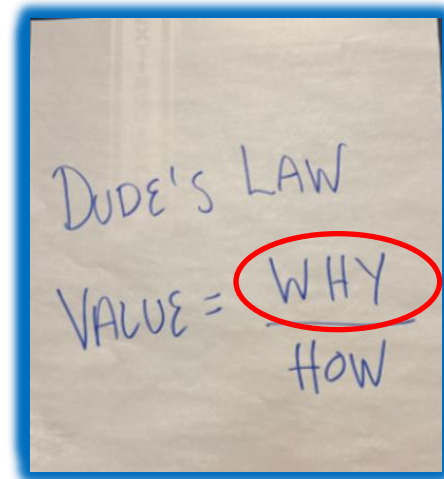


Part 1

Why?

Organization

Defined



TBM Solution



Key Components of TBM

IT Cost Transparency

Provides a detailed view of technology spending to ensure accountability and support informed financial decisions across the organization.

Business Alignment

Connects IT investments with business outcomes to ensure that technology supports strategic goals and delivers measurable value.

Data-Driven Decision Making

Leverages accurate, structured data to guide prioritization, resource allocation, and continuous improvement across IT services.

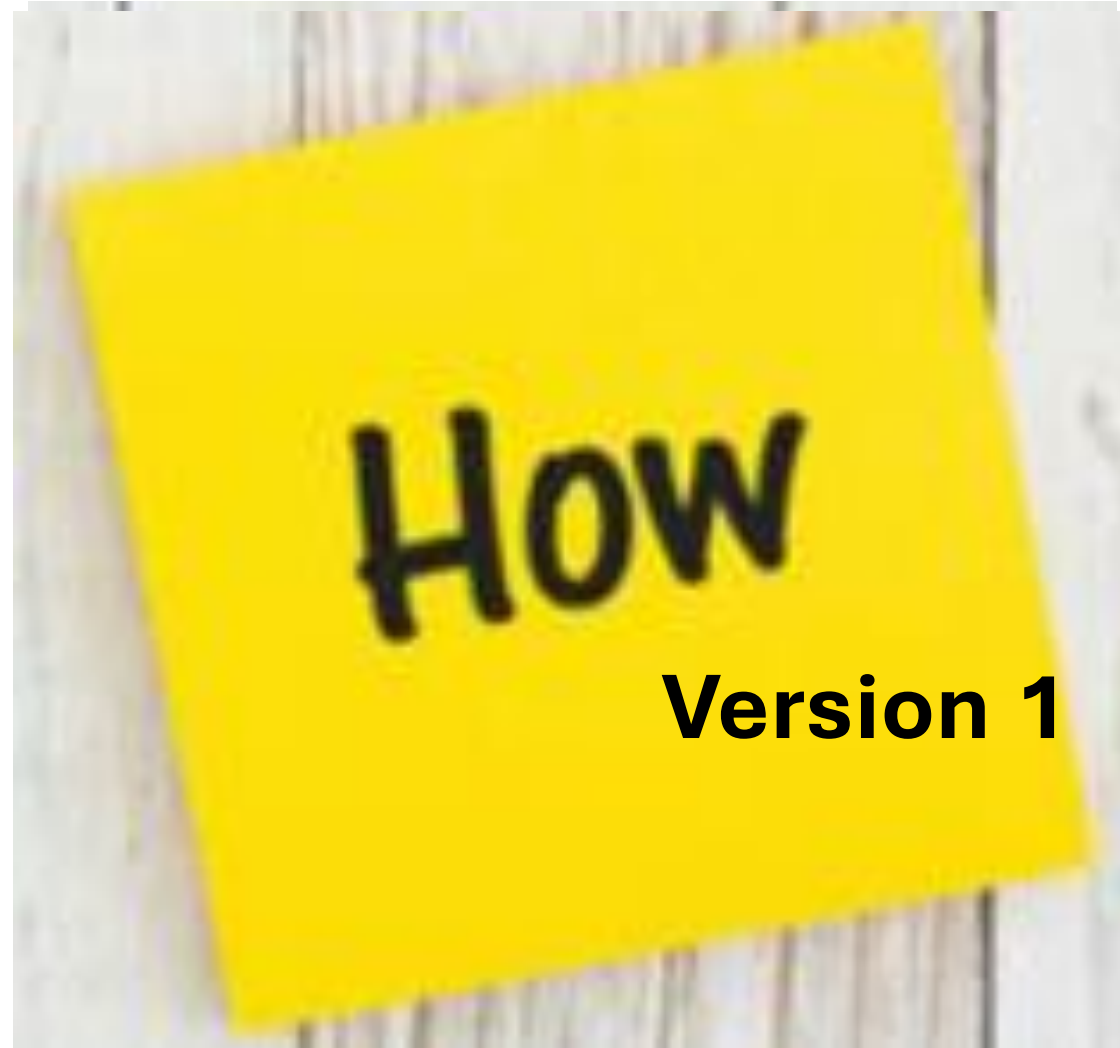
Promoting Collaboration

TBM fosters collaboration across departments, aligning technology goals with business objectives for improved results. (e.g., Rates Catalog)



~~TBM Solution~~

**In-house
Solution**



Why TBM Services In-house?

Cost Management and Funding Constraints

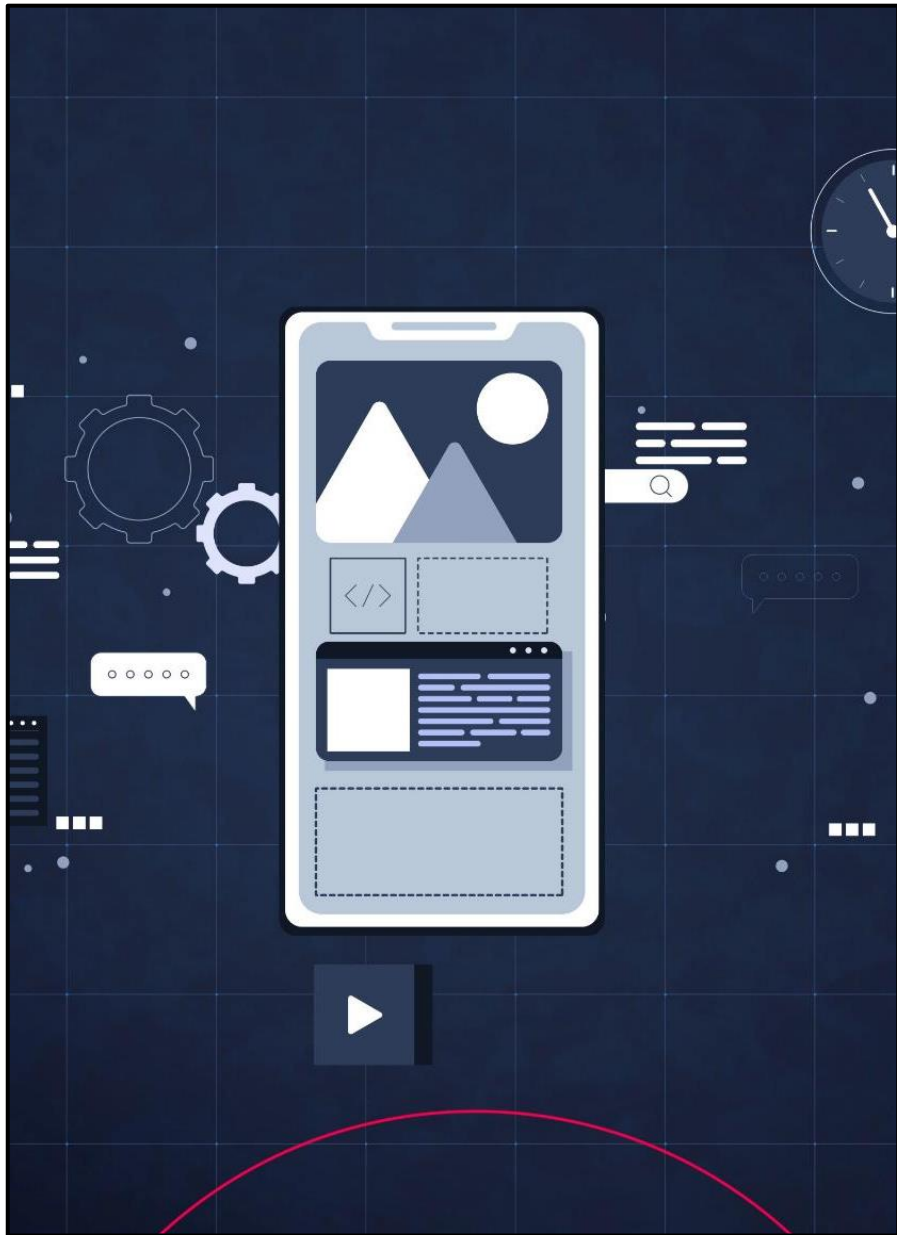
- Requirement to perform careful planning and manage strategic investments.
- **Strategic response to limited funding.**

Tailored Solutions

Provided the flexibility to create solutions that meet unique requirements and operational needs.

Enhanced Functionality

Led to improved functionality, allowing users to maximize the efficiency of their workflows.



WHAT IS A MINIMUM VIABLE PRODUCT



M Minimum

The most rudimentary, bare-bones foundation of the solution possible



V Viable

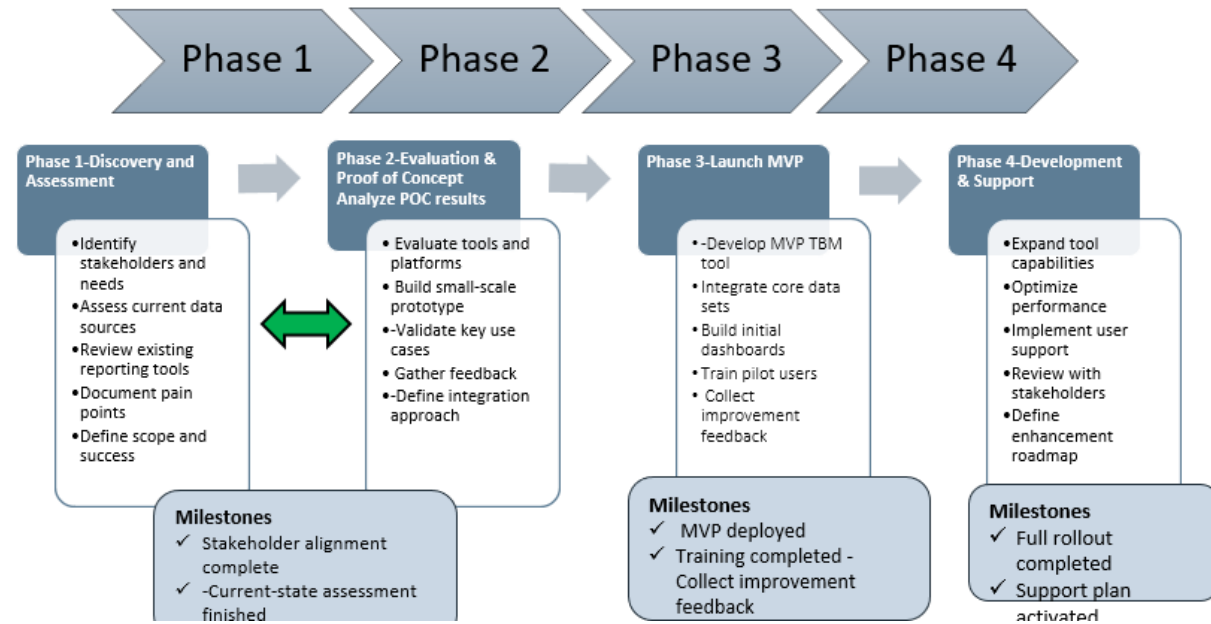
Sufficient enough for early adopters



P Product

Something tangible customers can touch and feel

ROADMAP AND MILESTONES



Governance



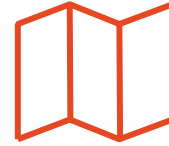
ROLES CLARITY & SUPPORT

Making sure everyone understands their role and we have set those roles up for success



SERVICES DEFINITION

Making transparent what is included in a service and associated costs



CUSTOMER SERVICE

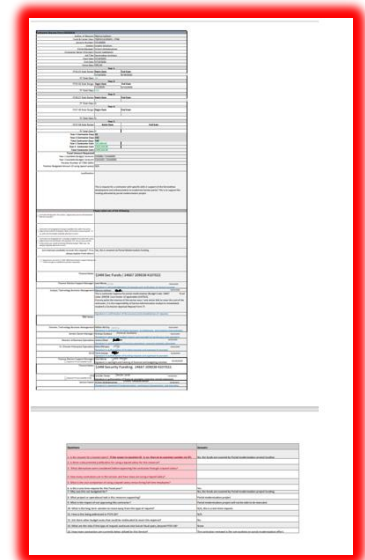
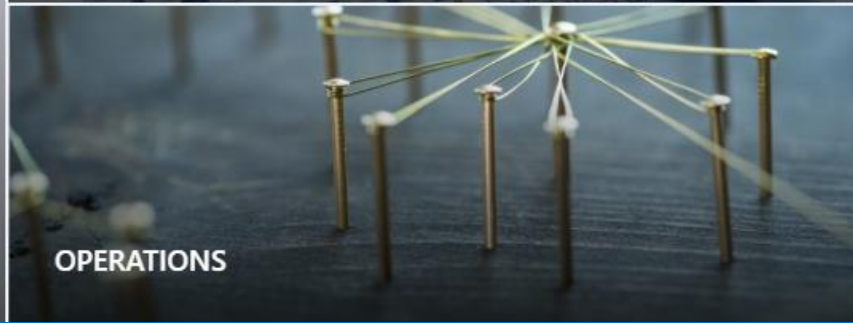
Fully understanding the customer experience with an eye towards continuous improvement



SERVICE LIFECYCLE

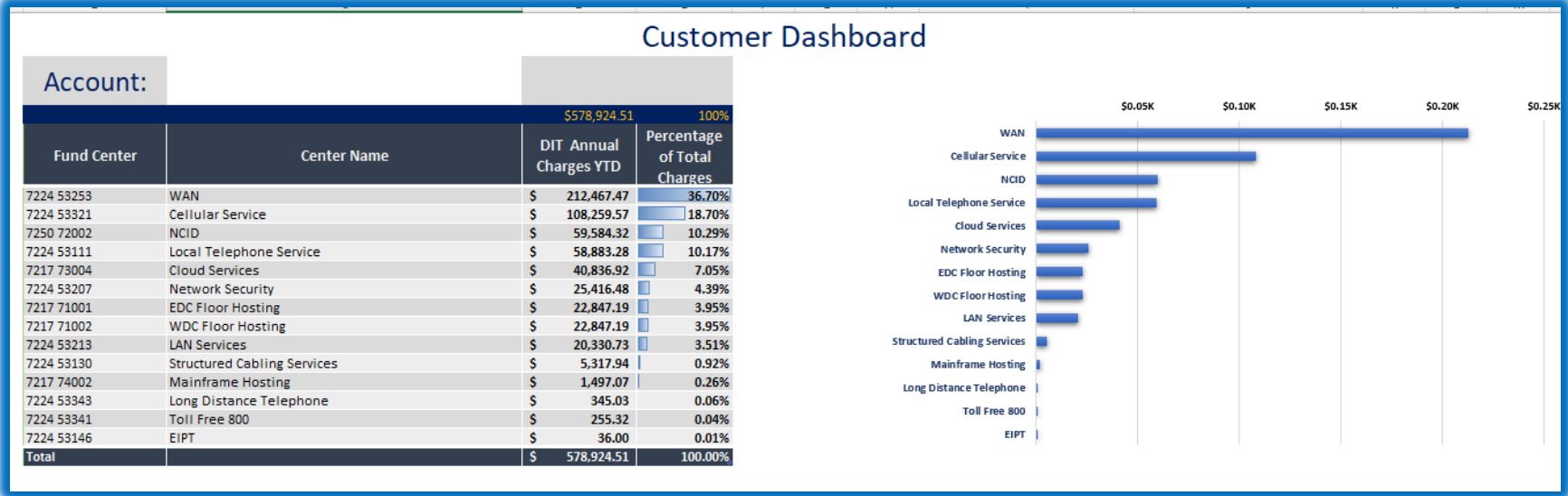
Ensuring a clear process from the start of a service to the decommission process

Collaboration



Agency Demand Forecasting

Delivery of monthly Billing Reports



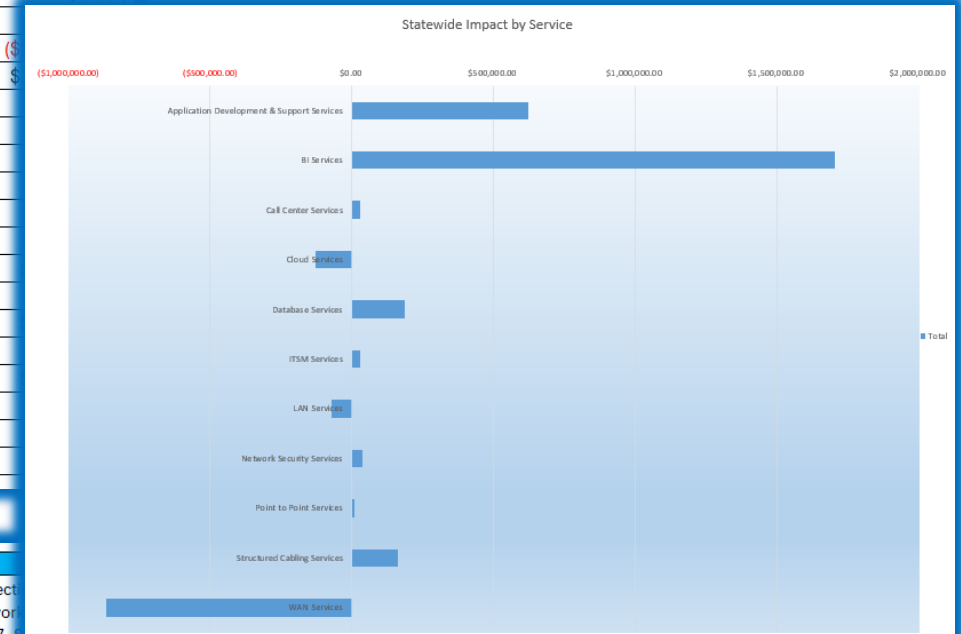
Annual survey to capture demand forecast

Center Name	Service Catalog Link	Name of agency Contact	Email address of agency Contact	Forecast Demand	Forecast Demand Narrative
Data Center Hosting	Data Center Co-Location Services NCDIT IT Services	John Doe	John.Dow@agency.gov	Agency Consumption Will Increase	Goal is to increase utilization by 10 percent
UNIX Hosting	Distributed Hosting NCDIT IT Services	Jane Doe	Jane.Dow@agency.gov	Agency Consumption Will Decrease	Goal is to retire all Unix Servers
Windows Hosting	Distributed Hosting NCDIT IT Services	Jane Doe	Jane.Dow@agency.gov	Agency Consumption Will Remain the Same	Agency Utilization will remain flat
Enterprise Service Bus	Enterprise Service Bus NCDIT IT Services				
Cloud Services	Cloud Services NCDIT IT Services				
Linux Hosting	Distributed Hosting NCDIT IT Services				
Desktop	Enterprise Endpoint Managed Services NCDIT IT Services				
Mainframe Hosting	Mainframe Hosting NCDIT IT Services				
Storage DASD	Distributed Hosting NCDIT IT Services				

Impact Analysis

Comprehensive Agency Impact Report

Agency	Cost of Consumption at FY2425 Rates	Cost of Consumption at FY2526 Rates	Delta (FY2526 minus FY2425 cost)
	\$0.00	\$0.00	\$0.00
Local PSTN Access	\$32,630.51	\$35,832.79	\$3,204.33
BI Services	\$42,809.60	\$32,553.04	(\$10,257.33)
ITSM Services	\$0.00	\$0.00	\$0.00
SQA and Performance Testing	\$15,431.57	\$15,859.93	\$428.36
Electronic Document Management	\$425,335.34	\$234,236.08	(\$191,099.26)
Enterprise Endpoint Management	\$45,087.28	\$152,366.54	\$107,279.26
Email	\$408,483.23	\$408,483.23	\$0.00
Active Directory	\$6,658.35	\$6,689.77	\$31.42
NCID	\$1,081.60	\$1,207.28	\$125.68
Server Farm Network & Security	\$7,478.44	\$6,132.10	(\$1,346.34)
Distributed Hosting-Windows	\$21,972.52	\$22,233.58	\$261.06
Enterprise Service Bus	\$54,765.32	\$64,233.00	\$9,467.68
Database Services	\$0.00	\$16,442.16	\$16,442.16
Mainframe Hosting	\$25,344.38	\$26,286.68	\$942.30
Storage-DASD	\$22,750.64	\$70,500.90	\$47,750.26
Direct Billings	\$10,158.43	\$8,372.20	(\$1,786.23)
Managed Telephony	\$883,228.18	\$903,375.40	\$20,147.22
Network Security Services	\$915.04	\$1,821.91	\$906.87
WAN Services	\$205.00	\$215.00	\$10.00
Wireless - Cellular Telephone Service	\$237.24	\$247.32	\$10.08

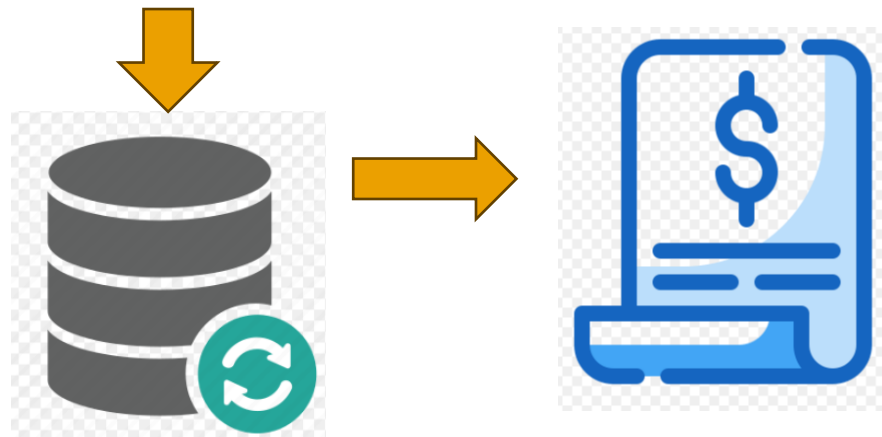


Agency	Increase/ Decrease
Agency ???	<p>Increases 7228 35026 -SQA and Performance Testing; \$12,251.24; 7217 75003 -Storage-DASD and Data Protection; \$6,971.91; 7224 53345 - Classic Telephony; \$5,753.92; 7250 72002 -NCID; \$3,104.64; 7224 53207 -Network Security Services; \$1,603.8; 7224 53321 -Wireless - Cellular Telephone Service; \$1,052.9; 7217 71007 -Managed Telephony; \$32.74;</p> <p>Decreases 7224 53253 -WAN Services -\$62,774.98; 7217 74002 -Mainframe Hosting -\$40,395.17; 7228 35027 -Electronic Document Management -\$20,242.37; 7217 73002 -Distributed Hosting-Windows -\$4,464.48; 7217 71006 -EDC WDC -\$742.93; 7217 73004 -Cloud Services -\$160.68; 7224 53213 -LAN Services -\$146.88;</p>

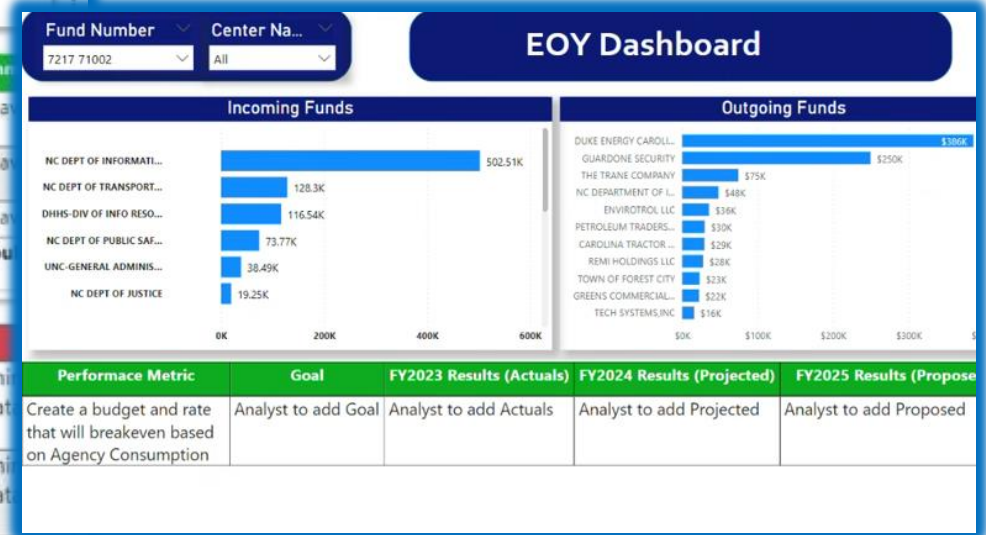
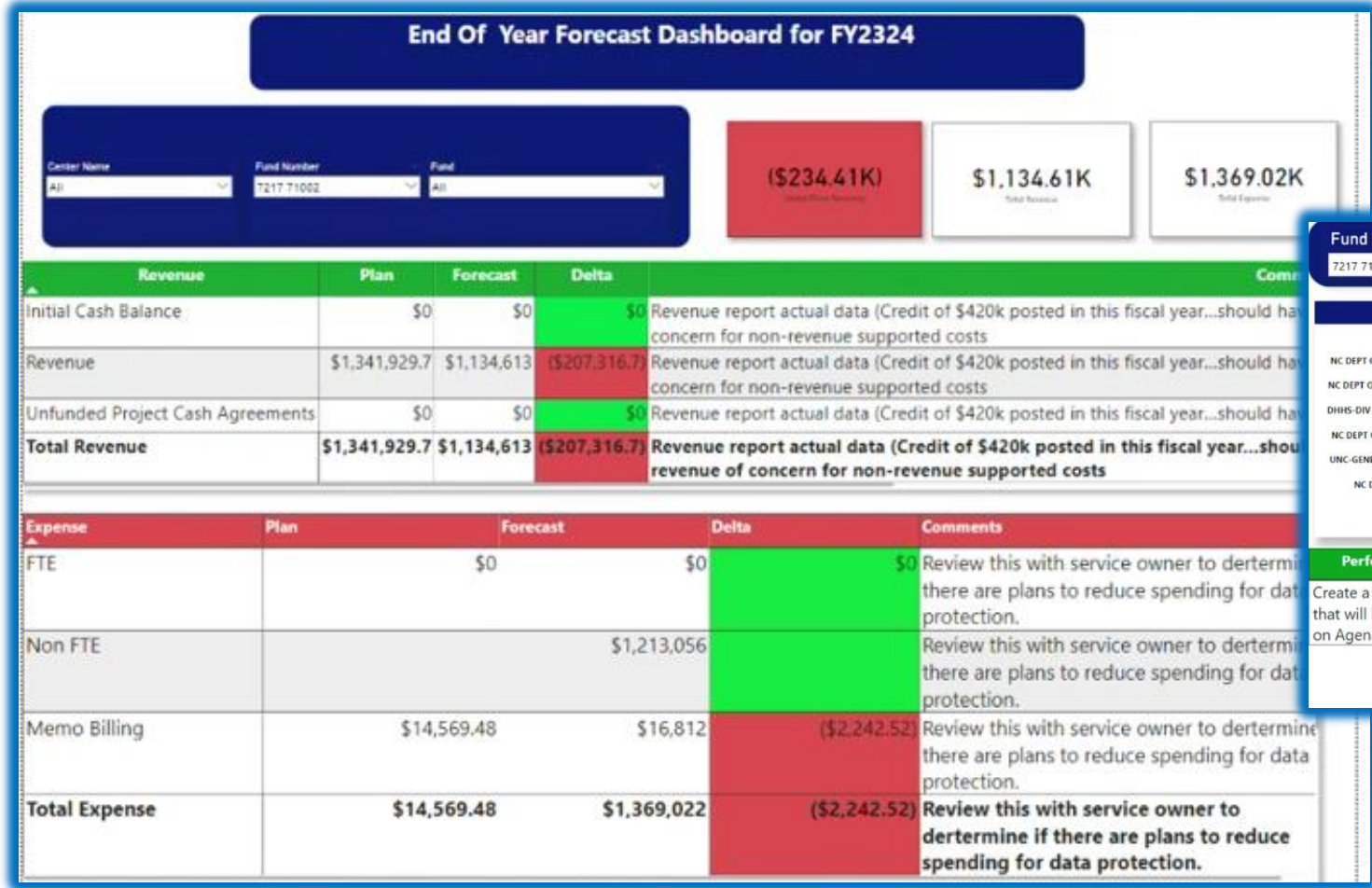
- Delivery of Rates Catalog to communicate price points of IT Services to customers
- Update of billing system
- Reporting to track actual vs plan.

BUSINESS APPLICATIONS
DIT Rate Schedules (Effective July 1, 2025 through June 30, 2026)

NCDIT Service	Budget Fund/AMU	Item Code	Description	FY25-26 Rate
Business Applications-->Digital Commons Website	700513 4135020	Chatbot	AI Chatbot Service	At Cost per MOU
Business Applications-->Electronic Content Management	700513 4135027	840057	Electronic Document Management (EDM)	\$61.25
Business Applications-->Electronic Content Management	700513 4135027	830100	Scanning Services	\$369.12
Business Applications-->IT Service Management	700513 4135023	840090	A ServiceNow Instance to Provide Access to the SaaS	\$75.20
Business Applications-->Tableau	700513 4125080	Viewer Support	Viewer Access License	At Cost per MOU
Business Applications-->Tableau	700513 4125080	Explorer Support	Explorer Access License	At Cost per MOU
Business Applications-->Tableau	700513 4125080	Creator Support	Creator Access License	At Cost per MOU
Business Applications-->Tableau	700513 4125080	820021	External Site Usage Rate	At Cost per MOU
Professional Services-->Project Management	700511 4179001	Consultant, Direct Bill	Consultant Procurement Rate	At Cost per MOU
Professional Services-->Project Management	700513 4135032	830055	Project Manager - NCDIT Staff	\$100.65
Professional Services-->Project Management	700513 4135032	Direct Bill	Project Manager - Third Party Consultant	At Cost per MOU
Professional Services-->Classic Software Quality, Security & Testing Services	700513 4135026	830066	Application Functional Testing	\$260.76
Professional Services-->Classic Software Quality, Security & Testing Services	700513 4135026	830065	Application Performance Analysis and Testing	\$382.23
Professional Services-->Classic Software Quality, Security & Testing Services	700513 4135026	830067	Application Monitoring	\$140.84
Professional Services-->Classic Software Quality, Security & Testing Services	700513 4135026	830068	Agile and DevOps Solutions for Operations	\$239.09
Professional Services-->Classic Software Quality, Security & Testing Services	700513 4135026	830060	SQA Support	\$80.62



EoY Forecasting



Integration with Existing Systems



GL Tools - *Focus: Financial records and budgets*

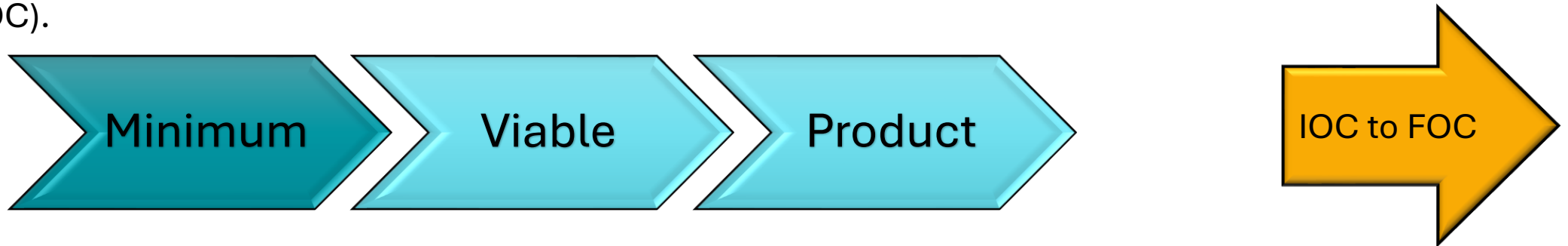
- **ERP Systems** (SAP, Oracle)
 - Import actuals, budgets, GL data
 - Core financial system of record

IT System Tools - *Focus: Operational and cost data inputs*

- **ITSM Tools** (ServiceNow, BMC)
 - Map services, tickets, CMDB to costs
- **Cloud Platforms** (AWS, Azure, GCP)
 - Supply usage and billing info
- **ITAM Tools (Asset Tools)**
 - Track assets, licenses, depreciation

MVP Roadmaps & Time Horizons

Defining the time horizons that you want your roadmap to address is one of the first steps in building a successful MVP roadmap. AND then Initial Operating Capability (IOC) to the Final Operating Capability (FOC).



<ul style="list-style-type: none"> ✓ Training ✓ Automation ✓ Audit Reporting ✓ Collaborative Workspaces ✓ Governance ✓ Templates and Forms ✓ Electronic Signatures ✓ Workflows ✓ Scheduler 	<ul style="list-style-type: none"> ✓ Training ✓ Automation ✓ Audit Reporting ✓ Budgeting and rates creation ✓ Spend plan ✓ Reporting and dashboarding ✓ Impact analysis ✓ Rates catalog ✓ Bill of IT 	<ul style="list-style-type: none"> ✓ Training ✓ Automation ✓ Audit Reporting ✓ Advanced reporting (data dictionary) ✓ Benchmarking ✓ EoY forecasting 	<ul style="list-style-type: none"> ✓ Training ✓ Automation ✓ Audit Reporting ✓ Data Sources ✓ Chatbot ✓ Generative AI ✓ System Integrations 	<ul style="list-style-type: none"> ✓ Training ✓ Automation ✓ Audit Reporting ✓ Collaboration <ul style="list-style-type: none"> • Collaboration/BRM • Agency Forecasting • Collaboration/IT • Service Owner Briefings • Collaboration/Finance • Standard Reporting ✓ Agentic AI ✓ Next Generation ✓ 3rd Party Tool??
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Evaluation Criteria for Development of a TBM RFP

Know your Stakeholders

Informed alignment

Know Your Requirements

The TBM tool must align with defined functionality needs to support the organization's goals.

Know Your Processes

The TBM tool must adapt to and support existing workflows and business processes.

Know Your Data

The TBM tool must effectively manage, interpret, and utilize organizational data to support decision-making.

Know Your Integration Capabilities and Data Requirements

The TBM tool must integrate smoothly with current systems to streamline data flow and operations.

Know Vendor ROI, Vendor costs, and Vendor Support model.

Strong vendor support ensures reliability, regular updates, and quick issue resolution for sustained ROI.





ITIL Guiding Principles

Part 2

How?

Vendor Defined



TBM Solution



Key Components of TBM

IT Cost Transparency

Provides a detailed view of technology spending to ensure accountability and support informed financial decisions across the organization.

Business Alignment

Connects IT investments with business outcomes to ensure that technology supports strategic goals and delivers measurable value.

Data-Driven Decision Making

Leverages accurate, structured data to guide prioritization, resource allocation, and continuous improvement across IT services.

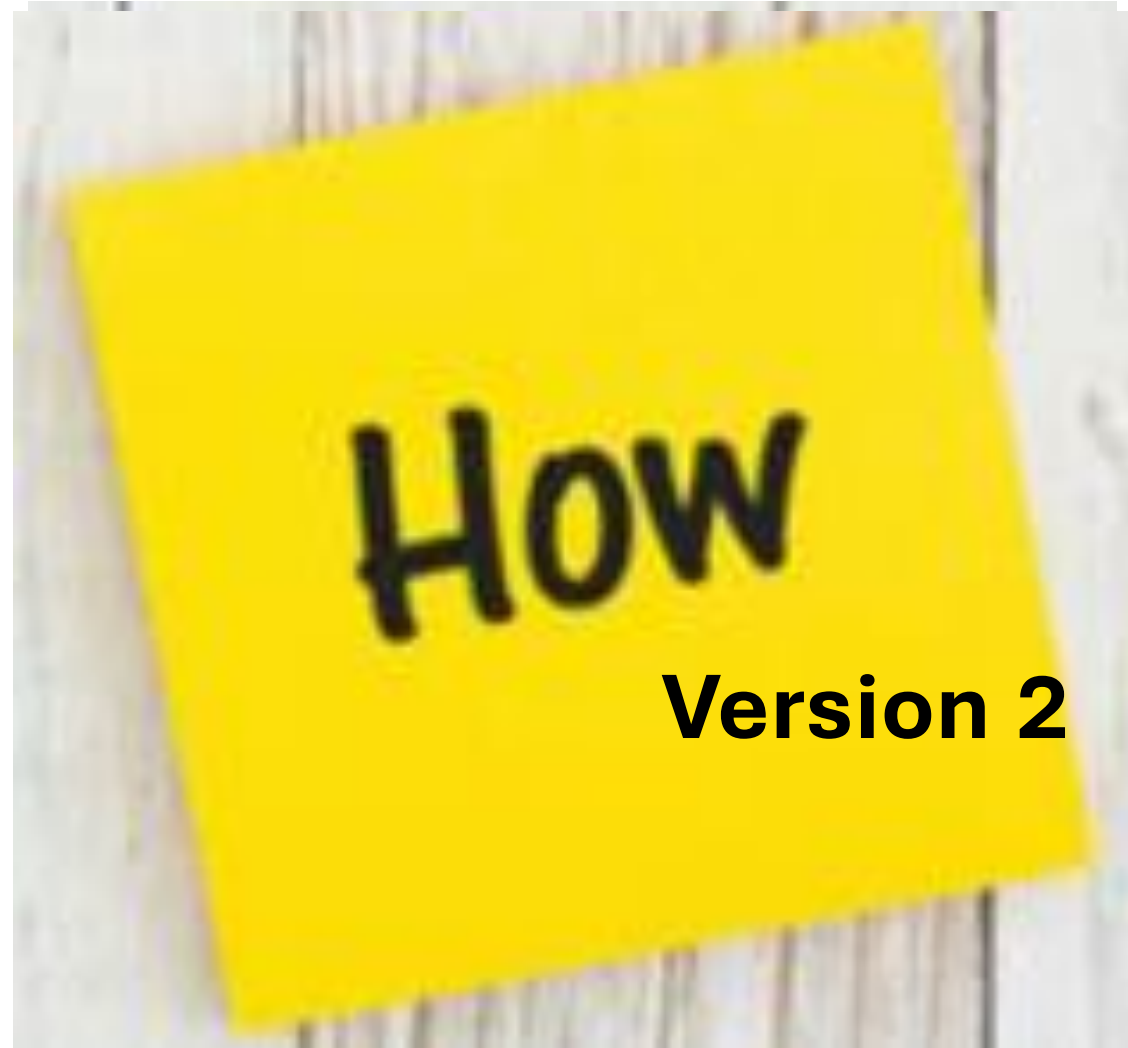
Promoting Collaboration

TBM fosters collaboration across departments, aligning technology goals with business objectives for improved results. (e.g., Rates Catalog)



~~TBM Solution~~

Vendor Solution



Case Studies and Examples

RFP Process



Engaging Stakeholders

One Form

- TBM Team
- Sponsor (CFO/CIO)
- NCDIT Procurement
- Statewide Procurement
- PMO
- EP MO
- ESRMO (PTA)
- STRAC Readiness
- Change Management



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Defining Key Requirements

6/27/2025		Technology Business Management (TBM) Application RFP	
Business Owner:	Milton McCoy	Program/Project Manager:	
1.0 Executive Summary		3.0 Cost	
The goal of this RFP is to evaluate the cost and perform a proof of concept to implement a Technology Business Management (TBM) platform to improve IT financial management, transparency, and resource allocation. DIT currently relies on an in-house system that performs key functions i.e. delivery of budgets and rates, and Impact Analysis Reporting but with limited capability to scale and support roadmap opportunities. A follow-on project will be necessary to implement the selected application and define the 5-year O&M expenses.		Project Budget: TBD	O&M: TBD
		TCO: TBD	
		Actual (to date): \$0	Remaining: TBD
		Budgetary Information: TBD	
2.0 Key Milestones / Decision Points / Key Deliverables		4.0 Schedule	
<ul style="list-style-type: none"> Justification Document Form: Complete Document application requirements: Complete Statewide IT Procurement - One Form: Complete Asset Requisition Request Form for budget: Going through approval process PMO - PPM Intake Form: In Progress ESRMO - Privacy Threshold Assessment (PTA): In Progress Vendor evaluation criteria: In Progress RFP Specifications: In Progress Vendor Use Cases: In Progress Statewide IT Procurement - Request for Proposal: In Progress RFP Award 		Start Date: 6/18/2025	End Date: 3/31/2026
		On Target: Yes	
		5.0 Key Issues and Risks	
		<ul style="list-style-type: none"> PPM Intake Form needs to be submitted <u>in order for</u> the project to be entered in Touchdown. The ESRMO PTA requires approval in Ariba <u>in order to</u> be reviewed. The project must be in Touchdown <u>in order to</u> be approved in Ariba. This RFP must be completed before accurate one-time and recurring expenses can be presented. One-time and O&M budget will be needed for the initial purchase and ongoing maintenance expenses. 	
		6.0 Communication Needs	

Defining Key Requirements

Details to be added. Email me at ReachMiltonMcCoy@gmail.com for final slides

Crafting RFP


Details to be added. Email me at ReachMiltonMcCoy@gmail.com for final slides


Evaluating Vendor Responses

Evaluation Criteria	TBMSoft360	ClarityOne	FinSightPro	MetricEdge	ValuePath
Cost Transparency & Allocation	4.5	3.8	4.2	3.5	4
Integration w/ GL & Cost Center	4.8	3.5	4.7	4	4.2
Ease of Use / User Interface	4	4.7	3.9	4.2	3.8
Customization & Flexibility	4.3	4	4.5	3.8	4.1
Reporting & Dashboards	4.6	3.9	4.3	4.1	4
Support & Training	4.2	4.5	4	3.6	4.3
Implementation Time	3.9	4.6	3.8	4.3	4
Total Cost of Ownership (TCO)	4	3.7	4.1	3.9	4.5
Overall Value Score (avg)	4.29	4.09	4.19	3.93	4.11

Notes:

TBMSoft360 leads in financial integration and transparency, ideal for cost modeling at an enterprise scale.

 **ClarityOne** is strongest in UI/UX and implementation speed, suitable for quick deployments with minimal training.

 **FinSightPro** offers a good balance of customization and financial insight features.

MetricEdge performs moderately across the board but lags in support and transparency.

ValuePath is a cost-effective solution with strong support services, though slightly less intuitive.

Conducting Demonstrations and Negotiations



TBM Metric Slide



1. Vendor Fit Score

– How well the selected vendor meets the technical, functional, and business requirements outlined in the RFP.

2. Cost vs. Budget Variance

– The difference between the awarded contract amount and the original budget estimate (underspend or overspend).

3. Time to Award

– The duration from RFP release to vendor selection; indicates process efficiency and internal alignment.

4. Stakeholder Satisfaction

– Feedback from end users, procurement, and leadership on the quality, transparency, and outcome of the RFP process.

5. Implementation Success Rate

– Whether the awarded solution was delivered on time, within scope, and met performance expectations post-award.

Lessons Learned



Q&A

ReachMiltonMcCoy@gmail.com

Conclusion

ReachMiltonMcCoy@gmail.com