



## AUDITING AND EXPENSE MANAGEMENT SPECIAL INTEREST GROUP

Partnering To Increase Your Practice



**SCTC AEX Partnering Profile – Lee Balaklaw**

***Society of Communications Technology Consultants  
Audit and Expense Management (AEX) Group Partnering Profile***

**Name:** Lee Balaklaw

**Company Name:** Schooley Mitchell of Louisa

**Company Address:** 1057 Meadowbrook Lane Louisa, KY 41230

**Business owner:** Yes

**Number of years in business:** 7.5

**Office Telephone Number:** 606 638 4300

**Mobile Telephone Number:** 606 483 3345 (preferred contact)

**Email address:** lee.balaklaw@schooleymitchell.com

**Website:** www.schooleymitchell.com/lmbalaklaw

## SCTC AEX Partnering Profile – Lee Balaklaw

### **Can assist with audit and expense management for the following types of services:**

- Traditional Voice Services ✓
- Voice Over IP and SIP ✓
- Traditional Data Services ✓
- MPLS Networks ✓
- SD-WAN ✓
- Video conferencing ✓
- Network hardware for
  - Voice ✓
  - Data ✓
  - Video
- Mobile Services and equipment ✓
- Others (list): cell phone, telephone, internet, GPS tracking, merchant services, small parcel shipping (Fedex, UPS, domestic and international), waste (dumpsters, medical waste, shredding), utilities (natural gas, propane, electricity, water, sewer).
- Locations outside the United States - No.

## SCTC AEX Partnering Profile – Lee Balaklaw

### **List and briefly describe services offered – mention any specialties such as types of expenses, specific vendor bills, etc.:**

Not for profit, tax classification on above categories of expenses, including refunds on telecommunications. We consult on billing expenses, make suggestions for improvement of services, and for future planning, replacement of phone systems. We do monthly audits of each bill. We have gone behind vendor reps and still find savings for clients. We typically will find more money in savings during our engagement than what was initially projected. Most of our clients renew with us because of our high touch high level of customer service, the time we save them, in addition to the money we save them. We become the client's single point of contact so they do not need to contact multiple different vendors. We have analyzed more than 80 different telecom company bills, and have worked on clients in 16 different states. We obtain refunds for billing errors. We will as needed migrate clients to new vendors if authorized and significantly beneficial, and will provide project management oversight through to completion.

## SCTC AEX Partnering Profile – Lee Balaklaw

**Preference in terms of client size based upon monthly spend:** Minimum \$ 1,000 monthly telecom spend (including cell phone, telephone, internet), \$200/month waste spending, \$750/month utility spending, \$1000 per month small parcel shipping spend. We are happy to help small to mid-size clients.

### **Types of client billing offered (check all that apply):**

- Contingency fee ✓✓
- Hourly Billing ✓
- Fixed Fee Project ✓
- Monthly Retainer ✓

### **Briefly describe your approach or opinions relating to the following:**

- All work done under my company's identity (including partner using an email from my company). Is this required or are you flexible? OR Identifying partner as a separate company. Is that acceptable?

Due to our franchisee status we would need to directly contract with the client, and would need access to online accounts for fraud detection, error recovery, and billing verification.

- Fee sharing – what are the variables?

We would be willing to pay a referral fee for the referral of a client. We have done much work with fellow franchisees so we are sensitive to the relationship between our referral partner and the client.

- Contractual requirements (do you have a contract you use for partnering arrangements?). Yes.
- Briefly describe your personal business style in dealing with clients and service providers.

We are hands on with the clients, answering questions, but keeping our referral partners in the loop. We like to keep clients in the loop regarding any vendor issues. We need client permission to talk to vendors, and we are mindful that we are the client's representative in talking to clients.

## **SCTC AEX Partnering Profile – Lee Balaklaw**

We have saved clients hundreds of thousands of dollars over the years.

We have many testimonial letters that we can provide on request.

With my background as a retired anesthesiologist, I am used to putting clients needs first and foremost. Clients renew with us, some already for multiple times. They would not do that unless they were happy with our service for them.

## SCTC AEX Partnering Profile – Cyndi Crews

### ***Society of Communications Technology Consultants Audit and Expense Management (AEX) Group Partnering Profile***

**Name:** Cyndi Crews

**Company Name:** Crews Telecom Consulting, Inc.; DBA – Abilita

**Company Address:** 7714 Cobblestone Ter, Lumberton, TX 77657

**Business owner:** Yes (Y/N)

**# of years in business:** 20 Years

**# of years SCTC Member:** 5 Years

**Office Telephone #:** (409) 980-0058

**Mobile Telephone #:** (409) 673-4855

**Email address:** ccrews@abilita.com

**Website:** abilita.com

**Education:** BS degree in Mathematics/Statistics & Computer Science

**Corporate Experience:** Manufacturing, ERP Systems, Acquisitions & Migration, IT Management, IT Infrastructure Design, Accounting, Logistics, System Implementations & Rollouts, User Training

**Strengths:** Analysis Tools, Executive Reporting, Analysis & Client Dashboards, Use of TAMS for Auditing, Expense Management & Reporting

**Are there any clients you prefer to avoid (size, industry, etc.)?**

No Restrictions

## SCTC AEX Partnering Profile – Cyndi Crews

### **What are your “sweet spots” (Vertical, Size, Geography, Bill types, etc.)?**

Any Vertical

Industries - Health Care, Manufacturing, Government, Services, Law

Bill Types – Traditional Voice, Wireless, Data, VoIP/SIP

### **Are there any skills, knowledge, experience you would like to highlight?**

Focus on Financial & Executive reporting including Graphic reports (easy to understand, professional, non-technical)

Telecom Analysis Report unique to every client – specifies current inventory & costs, alternative recommendations, estimated savings

Client Dashboard reporting – easy to understand & use, non-technical

Provides optimization service on these other Business expenses:

- 1) Credit Card Fees
- 2) Small Parcel Shipping
- 3) Large Shipping & Freight
- 4) Copy/Print Processing
- 5) Health Insurance
- 6) Worker’s Compensation
- 7) Energy & Utilities
- 8) Commercial Real Estate Leasing



## SCTC AEX Partnering Profile – Cyndi Crews

### Business Mix and Specialization:

- Initial Audit (IT/Telecom)      Primary      (Primary/Secondary/Not Applicable)
- Initial Audit (Other Expenses)      Secondary      (Primary/Secondary/Not Applicable)
- Ongoing Expense Management      Secondary      (Primary/Secondary/Not Applicable)
- Other IT/Telecom Projects      Secondary      (Primary/Secondary/Not Applicable)

Majority of business (70%) are audits. Once an audit is complete, we offer ongoing support in Expense Management Retainer (20%) and Projects Hourly (10%)

### Fee structure – Initial Audit:

- Contingency Fee      Primary      (Primary/Secondary/Not Applicable)
- Hourly Rate      Secondary      (Primary/Secondary/Not Applicable)
- Fixed Fee      Secondary      (Primary/Secondary/Not Applicable)
- Other Fee      None      (None/Minor/Some/Major)
- Retainer      No      (Yes/No - Do you expect/require a Retainer)

Majority (70%) are contingency. Will consider other engagement types based on client and situation.

### Fee structure – Ongoing Expense Management:

- Contingency Fee      Secondary      (Primary/Secondary/Not Applicable)
- Hourly Rate      Secondary      (Primary/Secondary/Not Applicable)
- Fixed Fee      Primary      (Primary/Secondary/Not Applicable)
- Other Fee      None      (None/Minor/Some/Major)
- Retainer      Yes      (Yes/No - Do you expect/require a Retainer)

Ongoing Expense Management is Fixed fee to review several vendors invoices on a monthly basis. Executive reports are produced for each vendor (identify changes, analyze why change occurred, provide recommendations) Dashboards are produced monthly or periodically for the client.

## SCTC AEX Partnering Profile – Cyndi Crews

**Audit/Expense Management Focus:** The following Matrix, provides the proficiency of the AEX consultant based on the Scope (Type of Bill) and Expertise/Skill (Analysis).

			Credit	Errors	Optmz	Elimnt	Offers	Exempt	Tax	E-rate	Fraud	Contract	DR	TEM
			A	B	C	D	E	F	G	H	I	J	K	L
Trad Voice	1		Yes	Yes *	Yes *	Yes *	Yes	Yes	Yes		Yes	Yes	Yes	Yes
VoIP/SIP	2		Yes	Yes *	Yes *	Yes *	Yes	Yes	Yes			Yes	Yes	Yes
Trad Data	3		Yes	Yes *	Yes *	Yes *	Yes	Yes	Yes			Yes	Yes	Yes
MPLS SD-wan	4		Yes	Yes *	Yes *	Yes *	Yes	Yes	Yes			Yes	Yes	Yes
Internet	5		Yes	Yes *	Yes *	Yes *	Yes *		Yes			Yes *		Yes
Equip	6		Yes	Yes	Yes	Yes	Yes				Yes			Yes
Cloud	7		Yes	Yes	Yes	Yes						Yes		Yes
Oth Subscr	8													
Wireless	9		Yes	Yes *	Yes *	Yes *	Yes *	Yes *	Yes		Yes *	Yes	Yes *	Yes
Video	10		Yes	Yes	Yes	Yes	Yes	Yes				Yes	Yes	Yes
Global bills	11		Yes	Yes	Yes	Yes	Yes	Yes				Yes		Yes
Other exp	12		Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes

*See legend on next page.*

## SCTC AEX Partnering Profile – Cyndi Crews

### **Audit/Expense Management Focus - Legend:**

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- 1 Traditional Phone Lines (Pots)
  - 2 Voice over IP & SIP Voice Services
  - 3 Traditional Data Services (Private Lines, OPX, Frame Relay)
  - 4 MPLS & SD-WAN
  - 5 Internet & other Access (Comcast, Spectrum, etc.)
  - 6 Equipment /Hardware
  - 7 Cloud Services
  - 8 Other Subscription Services
  - 9 Wireless (Smart phones, tablets, other)
  - 10 Video Conferencing
  - 11 Global (not US/Canada) Invoices
  - 12 Other expenses outside of IT/Telecom
- 
- A Credits
  - B Billing Errors (Contract/Tariff issues)
  - C Optimization of lines & Services
  - D Elimination of Unused and Redundant Services
  - E Competitive Offerings/Special Offers
  - F Unclaimed Exemptions/Incorrect classification
  - G Taxes, Surcharges, Fees
  - H E-rate
  - I Fraud/Abuse/Misuse
  - J Contracts (Negotiation/Renegotiations)
  - K Disaster Recovery/Model Office/Best Practices
  - L Ongoing Monthly Expense Management (TEM)
-

## SCTC AEX Partnering Profile – Robert Harris

### ***Society of Communications Technology Consultants Audit and Expense Management (AEX) Group Partnering Profile***

**Name:** Robert Lee Harris

**Company Name:** www.auditthecloud.com

**Company Address:** 2005 Palo Verde Ave., #200, Long Beach CA

**Business owner:** Yes (Y/N)

**# of years in business:** 28 Years                      **# of years SCTC Member:** 20 Years

**Office Telephone #:** (800) 984-1774                      **Mobile Telephone #:** (562) 260-5868

**Email address:** Robert.harris@comadvantage.net

**Website:** www.auditthecloud.com

Robert Lee Harris is President of Communications Advantage, Inc. and founder of Audit the Cloud, a vendor-independent consulting practice specializing in cost analysis, reduction, and optimization of cloud-based services and subscriptions. Since the inception of Communications Advantage, Inc. over 28 years ago, the company has helped businesses from a broad spectrum of sizes and industries to control infrastructure costs and successfully deploy communications technology solutions. From small local businesses to large corporations, industries ranging from medical to automotive, Communications Advantage, Inc. is proud to be part of its client's success. Communications Advantage, Inc. has provided millions of dollars in tangible long-distance savings through effective rate and contract negotiation and has helped customers evaluate and implement voice communications and WAN technology ranging in size from 20 stations to over 10,000 users.

Audit the Cloud is a subsidiary of Communications Advantage, Inc. Under the Communications Advantage banner, our team provides infrastructure audits, product assessments and project consulting services, including Software as a Service (SaaS) and hosted services. Communications Advantage, Inc. endeavors

## SCTC AEX Partnering Profile – Robert Harris

to take our expertise in cost-saving solutions, business and infrastructure analytics, and our passion for customer advocacy to the next level by offering the same excellent services and reputable business practices to those looking for cloud-based solutions through Audit the Cloud.

#

### **Are there any clients you prefer to avoid (size, industry, etc.)? Please describe.**

No Restrictions

### **What are your “sweet spots” (Vertical, Size, Geography, Bill types, etc.)? Please describe**

Industries – Not industry specific

Bill Types –Data, VoIP/SIP, Software as a Service, Cloud Computing and Infrastructure

### **Are there any skills, knowledge, experience you would like to highlight? Please describe**

Early experience in auditing cloud subscriptions and services, Amazon Web Services Certified Cloud Practitioner, Benchmarking of large (> \$M per year enterprise agreements)

### **Business Mix and Specialization: (Elaborate below)**

- |                                  |                  |                                    |
|----------------------------------|------------------|------------------------------------|
| • Initial Audit (IT/Telecom)     | <u>Secondary</u> | (Primary/Secondary/Not Applicable) |
| • Initial Audit (Other Expenses) | <u>Primary</u>   | (Primary/Secondary/Not Applicable) |
| • Ongoing Expense Management     | <u>Secondary</u> | (Primary/Secondary/Not Applicable) |
| • Other IT/Telecom Projects      | <u>Primary</u>   | (Primary/Secondary/Not Applicable) |

We have offered engaged in very successful telecom/data audits as an entry point into Cloud cost management.

## SCTC AEX Partnering Profile – Robert Harris

**Fee structure – Initial Audit: (Elaborate below).** *Note - disclosure of specific terms (% , years, rates, fixed fee, etc.) will be discussed at a later date, in your interview with the AEX consultant.*

- Contingency Fee      Primary              (Primary/Secondary/Not Applicable)
- Hourly Rate            Secondary              (Primary/Secondary/Not Applicable)
- Fixed Fee                Secondary              (Primary/Secondary/Not Applicable)
- Other Fee                None                      (None/Minor/Some/Major)
- Retainer                 No                         (Yes/No - Do you expect/require a Retainer)

Contingency audits available for Software as a Service, benchmarking. Cloud computing platform structures vary, depending on complexity of services and ability to baseline costs.

**Fee structure – Ongoing Expense Management: (Elaborate below).** *Note - disclosure of specific terms (% , years, rates, fixed fee, etc.) will be discussed at a later date, in your interview with the AEX consultant.*

- Contingency Fee      Secondary              (Primary/Secondary/Not Applicable)
- Hourly Rate            Secondary              (Primary/Secondary/Not Applicable)
- Fixed Fee                Primary                 (Primary/Secondary/Not Applicable)
- Other Fee                None                      (None/Minor/Some/Major)
- Retainer                 No                         (Yes/No - Do you expect/require a Retainer)

Ongoing Expense Management is Fixed fee. Some Cloud Platforms will require third party monitoring software as part of management.

**SCTC AEX Partnering Profile – Robert Harris**

**Audit/Expense Management Focus: The following Matrix, provides the proficiency of the AEX consultant based on the Scope (Type of Bill) and Expertise/Skill (Analysis).**

			Credit	Errors	Optmz	Elimnt	Offers	Exempt	Tax	E-rate	Fraud	Contract	DR	TEM
			A	B	C	D	E	F	G	H	I	J	K	L
Trad Voice	1		Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes
VoIP/SIP	2		Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes
Trad Data	3		Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes
MPLS SD-wan	4			Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes
Internet	5			Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes
Equip	6			Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes
Cloud	7		Yes	Yes	Yes	Yes	Yes		Yes			Yes	Yes	Yes
Oth Subscr	8		Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes
Wireless	9						Yes					Yes		
Video	10													
Global bills	11			Yes	Yes	Yes	Yes	Yes			Yes	Yes		Yes
Other exp	12		Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes

*See legend on next page.*

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## SCTC AEX Partnering Profile – Robert Harris

### **Audit/Expense Management Focus - Legend:**

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- 1 Traditional Phone Lines (Pots)
- 2 Voice over IP & SIP Voice Services
- 3 Traditional Data Services (Private Lines, OPX, Frame Relay)
- 4 MPLS & SD-WAN
- 5 Internet & other Access (Comcast, Spectrum, etc.)
- 6 Equipment /Hardware
- 7 Cloud Services
- 8 Other Subscription Services
- 9 Wireless (Smart phones, tablets, other)
- 10 Video Conferencing
- 11 Global (not US/Canada) Invoices
- 12 Other expenses outside of IT/Telecom

- A Credits
  - B Billing Errors (Contract/Tariff issues)
  - C Optimization of lines & Services
  - D Elimination of Unused and Redundant Services
  - E Competitive Offerings/Special Offers
  - F Unclaimed Exemptions/Incorrect classification
  - G Taxes, Surcharges, Fees
  - H E-rate
  - I Fraud/Abuse/Misuse
  - J Contracts (Negotiation/Renegotiations)
  - K Disaster Recovery/Model Office/Best Practices
  - L Ongoing Monthly Expense Management (TEM)
-



## SCTC AEX Partnering Profile – Jane Laino

### ***Society of Communications Technology Consultants Audit and Expense Management (AEX) Group Partnering Profile***

**Name:** Jane Laino

**Company Name:** Digby 4 Group, Inc.

**Company Address:** 370 Lexington Ave., Suite 905, New York, NY 10017

**Business owner:** Yes (Y/N)

**# of years in business:** 42 years                      **# of years SCTC Member:** 37 years

**Office Telephone #:** 212-883-1191      **Mobile Telephone #:** 917-673-1955

**Email address:** jane.laino@digby4.com

**Website:** www.digby4.com

#### **Experience (Before Consulting):**

- Summer Job in high school – Switchboard Operator for Car Dealership
- 4 years – Service Representative with the Bell System in New York, St.Louis and Kansas City, MO
- 3 years – Project Manager NYC based consultancy ordering communications services and overseeing PBX implementations

#### **Other (Education, Certifications, Awards, etc.):**

- Bachelor of Arts Degree – Queens College of the City University of New York
- Certified Woman-Owned Business with WBENC
- Writer on behalf of SCTC for No Jitter web publication <https://www.nojitter.com/author/jane-laino>

## SCTC AEX Partnering Profile – Jane Laino

### **Are there any clients you prefer to avoid (size, industry, etc.)? Please describe.**

In terms of client industry, we have historically not done government work (except for a foreign government who is a long term-client.)

In terms of size, most of our work is for clients with an annual spend of \$3 million and up, for fixed and mobile services combined. Our partnership with a hosted TEM provider enables us to leverage their size (700+ people) to support bigger opportunities. We provide professional services in support of the TEM system.

### **What are your “sweet spots” (Vertical, Size, Geography, Bill types, etc.)? Please describe**

*Industries* - Our clients are typically based in New York City and have locations throughout the United States and abroad. Our largest client is a NYC-based hospital system. We also have several large law firm clients with global networks. Have recent experience with media companies (advertising, etc.) and also with a manufacturer. Longest term client is the purchasing arm of a foreign government.

*Bill Types* –We’ve never met a bill we couldn’t figure out and have experience with communications bills both for legacy services and new services, voice, data and mobile. We are on the learning curve with web conferencing bills.

We also review contracts for our clients and make recommendations to improve the contract language and terms before signing.

Since we have been selling the hosted TEM system for the past ten years, we have developed considerable expertise in the processes and professional services needed to keep a TEM up-to-date and useful.

**Are there any skills, knowledge, experience you would like to highlight?**

- We are known for being easy to work with by our clients, all of whom are long term (several decades for most).
- We provide each of our clients with an Economic Benefit report showing them what they paid us vs. what we saved them.
- We maintain good relationships with communications service providers on behalf of each of our clients.

**Business Mix and Specialization/Fee Structure:**

- We provide services on an hourly or daily basis for our clients. This will be an agreed upon range monthly or for a described project.
- We also sell the hosted TEM system with professional services built around it. The TEM cost is based upon the client's annual spend for fixed line and the number of devices for mobile.

**SCTC AEX Partnering Profile – Gary Lisbon**

***Society of Communications Technology Consultants  
Audit and Expense Management (AEX) Group Partnering Profile***

**Name:** Gary Lisbon

**Company Name:** GL Voice Solutions Inc.

**Company Address:** 2093 Swamp Pike Gilbrertsville, PA 19525

**Business owner:** Yes (Y/N)

**Number of years in business:** 17      **Number of years SCTC Member:** 2004

**Office Telephone #** (800) 388- 9088      **Mobile Telephone #** (610)517 - 7817 .

**Email address:** Gary@glvoice.com

**Website:** www.GLvoice.com

## SCTC AEX Partnering Profile – Gary Lisbon

### Are there any clients you prefer to avoid (size, industry, etc.)?

Government

### What are your “sweet spots” (Vertical, Size, Geography, Bill types, etc.)?

Shippers, Cargo, Logistics, trucking companies, any where in US. Low revenue 20 mil/yr. would prefer multiple locations and revenue north of 500 Mil.

### Are there any skills, knowledge, experience you would like to highlight?

Using our own TEM provides detailed proof of savings and invoice client constantly. Are TEM uses crystal reporting and provides over 80 canned reports, customization can be done to meet the clients preferred view. We provide an .rpt file viewer, allowing for drill down to the details and the ability to down load the reports into .pdf. Word, Excel and other formats. We are not just auditing the services, or getting refunds, we understand the hardware and software component allowing us to understand the whole picture, provide recommendations and implement new services. We also disconnect old accounts and follow thought with billing to ensure the new services ordered are billed correctly and that old ones are closed. We have ben servicing and installing system for over 35 years.

### Business Mix and Specialization:

- Initial Audit (IT/Telecom) Primary
- Initial Audit (Other Expenses) Primary
- Ongoing Expense Management Primary
- Other IT/Telecom Projects Primary

## SCTC AEX Partnering Profile – Gary Lisbon

**Fee structure – Initial Audit:** *Note - disclosure of specific terms (% , years, rates, fixed fee, etc.) will be discussed at a later date, in your interview with the AEX consultant.*

- Contingency Fee      Primary
- Hourly Rate            Secondary
- Fixed Fee                Primary
- Other Fee                Bonus Structure
- Retainer                 It Depends fee could be based on a retainer

**Fee structure – Ongoing Expense Management:** *Note - disclosure of specific terms (% , years, rates, fixed fee, etc.) will be discussed at a later date, in your interview with the AEX consultant.*

- Contingency Fee      It depends on Initial Audit Structure \_\_\_\_\_  
(Primary/Secondary/Not Applicable)
- Hourly Rate            Secondary
- Fixed Fee                Primary
- Other Fee                Some
- Retainer                 It Depends

## SCTC AEX Partnering Profile – Gary Lisbon

**Audit/Expense Management Focus:** The following Matrix, provides the proficiency of the AEX consultant based on the Scope (Type of Bill) and Expertise/Skill (Analysis).

		Credit	Errors	Optmz	Elimnt	Offers	Exempt	Tax	E-rate	Fraud	Contract	DR	TEM
		A	B	C	D	E	F	G	H	I	J	K	L
Trad Voice	1	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Partner	Yes *	Yes *	Yes *	Yes *
VoIP/SIP	2	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Partner	Yes *	Yes *	Yes *	Yes *
Trad Data	3	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Partner	Yes *	Yes *	Partner	Yes *
MPLS SD-wan	4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Partner	Yes *	Yes *	Partner	Yes *
Internet	5	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Partner	Yes *	Yes *	Partner	Yes *
Equip	6	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Partner	Yes *	Yes *	Yes	Yes *
Cloud	7	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Partner	Yes *	Yes *	Yes	Yes *
Hosted	8	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Partner	Yes *	Yes *	Yes	Yes *
Wireless	9	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Partner	Yes *	Yes *	Yes *	Yes *
Video	10	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Partner	Yes	Yes	Yes	Yes
Global	11												
On going Exp Mangt	12	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *

*See legend on next page.*

## SCTC AEX Partnering Profile – Gary Lisbon

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- 1 Traditional Phone Lines (Pots)
- 2 Voice over IP & SIP Voice Services
- 3 Traditional Data Services (Private Lines, OPX, Frame Relay)
- 4 MPLS & SD-WAN
- 5 Internet & other Access (Comcast, Spectrum, etc.)
- 6 Equipment /Hardware
- 7 Cloud Services
- 8 Other Subscription Services
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  - B Billing Errors (Contract/Tariff issues)
  - C Optimization of lines & Services
  - D Elimination of Unused and Redundant Services
  - E Competitive Offerings/Special Offers
  - F Unclaimed Exemptions/Incorrect classification
  - G Taxes, Surcharges, Fees
  - H E-rate
  - I Fraud/Abuse/Misuse
  - J Contracts (Negotiation/Renegotiations)
  - K Disaster Recovery/Model Office/Best Practices
  - L Ongoing Monthly Expense Management (TEM)
-



**SCTC AEX Partnering Profile – Denise Munro**

***Society of Communications Technology Consultants  
Audit and Expense Management (AEX) Group Partnering Profile***

**Name:** Denise Munro

**Company Name:** CRG Telecom Inc. dba Cost Reduction Group

**Company Address:** 202 Westwind Drive, Coppell, Texas 75019

**Business owner:** Yes (Y/N)

**Number of years in business:** 27

**Number of years SCTC Member:** 23

**Office Telephone: #** (214) 693-5331

**Mobile Telephone #:** (214)693-5331

**Email address:** denise@crgtele.com

**Website:** www.crgtele.com

**Are there any clients you prefer to avoid (size, industry, etc.)?**

I work with a variety of clients. I would avoid working with clients spending less than \$5,000 per month.

**What are your “sweet spots” (Vertical, Size, Geography, Bill types, etc.)?**

I typically work with client spending \$1-\$10 million annually. I work with a wide range of clients in many industries including, hospitality, healthcare, manufacturing, transportation and energy.

## SCTC AEX Partnering Profile – Denise Munro

### Are there any skills, knowledge, experience you would like to highlight?

My skills include identifying, analyzing, and reducing expenses related to wireline and wireless services. I conduct one time contingency and ongoing telecom expense management. I also do a lot of project-based work that keeps me up to date on most telecom services/solutions. I am able to recommend solutions that make sense and saves money. I am a nationally known speaker, author and instructor in the area of telecom audits. I have a further specialty in taxes, fees and surcharges and have worked with non-profit organizations.

### Business Mix and Specialization: (Elaborate below)

- Initial Audit (IT/Telecom)      Primary      (Primary/Secondary/Not Applicable)
- Initial Audit (Other Expenses)      Primary      (Primary/Secondary/Not Applicable)
- Ongoing Expense Management      Secondary      (Primary/Secondary/Not Applicable)
- Other IT/Telecom Projects      Primary      (Primary/Secondary/Not Applicable)

**Fee structure – Initial Audit:** (Elaborate below). *Note - disclosure of specific terms (% , years, rates, fixed fee, etc.) will be discussed at a later date, in your interview with the AEX consultant.*

- Contingency Fee      Primary      (Primary/Secondary/Not Applicable)
- Hourly Rate      Primary      (Primary/Secondary/Not Applicable)
- Fixed Fee      Primary      (Primary/Secondary/Not Applicable)
- Other Fee      \_\_\_\_\_      (None/Minor/Some/Major)
- Retainer      \_\_\_\_\_      (Yes/No - Do you expect/require a Retainer)

I design fee structures based on client preferences.

## SCTC AEX Partnering Profile – Denise Munro

**Fee structure – Ongoing Expense Management:** (Elaborate below). *Note - disclosure of specific terms (% , years, rates, fixed fee, etc.) will be discussed at a later date, in your interview with the AEX consultant.*

- Contingency Fee      Primary      (Primary/Secondary/Not Applicable)
- Hourly Rate          Primary      (Primary/Secondary/Not Applicable)
- Fixed Fee            Primary      (Primary/Secondary/Not Applicable)
- Other Fee            \_\_\_\_\_      (None/Minor/Some/Major)
- Retainer              \_\_\_\_\_      (Yes/No - Do you expect/require a Retainer)

## SCTC AEX Partnering Profile – Denise Munro

**Audit/Expense Management Focus:** The following Matrix, provides the proficiency of the AEX consultant based on the Scope (Type of Bill) and Expertise/Skill (Analysis).

		Credit	Errors	Optmz	Elimnt	Offers	Exempt	Tax	E-rate	Fraud	Contrct	DR	TEM
		A	B	C	D	E	F	G	H	I	J	K	L
Trad Voice	1	Yes*	Yes *	Yes *	Yes *	Yes*	Yes*	Yes*			Yes*		Yes*
VoIP/SIP	2	Yes*	Yes *	Yes *	Yes *	Yes*	Yes*	Yes*			Yes*		Yes*
Trad Data	3	Yes*	Yes*	Yes*	Yes*	Yes*	Yes*	Yes*			Yes*		Yes*
MPLS SD-wan	4		Yes*	Yes*	Yes*	Yes*							
Internet	5	Yes*	Yes *	Yes *	Yes *	Yes *					Yes *		Yes*
Equip	6		Yes*	Yes*	Yes*	Yes*							
Cloud	7	Yes*	Yes*	Yes*	Yes*						Yes*		
Oth Subscr	8												
Wireless	9	Yes	Yes *	Yes *	Yes *	Yes *	Yes *			Yes *	Yes	Yes *	Yes*
Video	10												
Global bills	11												
Other exp	12												

*See legend on next page.*

## SCTC AEX Partnering Profile – Denise Munro

### **Audit/Expense Management Focus - Legend:**

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- 1 Traditional Phone Lines (Pots)
- 2 Voice over IP & SIP Voice Services
- 3 Traditional Data Services (Private Lines, OPX, Frame Relay)
- 4 MPLS & SD-WAN
- 5 Internet & other Access (Comcast, Spectrum, etc.)
- 6 Equipment /Hardware
- 7 Cloud Services
- 8 Other Subscription Services
- 9 Wireless (Smart phones, tablets, other)
- 10 Video Conferencing
- 11 Global (not US/Canada) Invoices
- 12 Other expenses outside of IT/Telecom

- A Credits
  - B Billing Errors (Contract/Tariff issues)
  - C Optimization of lines & Services
  - D Elimination of Unused and Redundant Services
  - E Competitive Offerings/Special Offers
  - F Unclaimed Exemptions/Incorrect classification
  - G Taxes, Surcharges, Fees
  - H E-rate
  - I Fraud/Abuse/Misuse
  - J Contracts (Negotiation/Renegotiations)
  - K Disaster Recovery/Model Office/Best Practices
  - L Ongoing Monthly Expense Management (TEM)
-

## SCTC AEX Partnering Profile – Hamid Nabavi

### ***Society of Communications Technology Consultants Audit and Expense Management (AEX) Group Partnering Profile***

**Name:** Hamid Nabavi

**Company Name:** Optimized Communications

**Company Address:** 4206 Lillington Dr, Durham North Carolina 27704

**Business owner:** Yes (Y/N)

**# of years in business:** 18 Years                      **# of years SCTC Member:** 13 Years

**Office Telephone #:** 949-338-2924    **Mobile Telephone #:** 949-338-2924

**Email address:** hnabavi@optimizedcomm.com

**Website:** www.optimizedcomm.com

### **Background:**

Telecom consulting since 2003, SCTC member since 2008

Prior work was product marketing management for couple modem chip set product lines of Conexant Systems in Newport Beach, CA.

Education: undergrad in math & computer science in Iran, two grad degrees in computers & EE, and one in business management in California.

Hobby/interest: Hiking

**Are there any clients you prefer to avoid (size, industry, etc.)? Please describe.**

No Restrictions

**What are your “sweet spots” (Vertical, Size, Geography, Bill types, etc.)? Please describe**

While in CA, SMBs in finance, transportation, construction, & other industries. Also did some subcontract work for two clients of Kris Macurdy’s; one SMB; the other, a large client with locations in several states.

Currently have two medium size clients with multiple locations, one, a building supplies provider to construction industry, based here in NC, the other, a manufacturer and distributor of building materials in Pennsylvania.

Open to teaming/subcontracting (in either directions) with fellow consultants—subcontracting with other TAMS users, and referral or whole service optimization with others.

**Are there any skills, knowledge, experience you would like to highlight? Please describe**

Have done, and currently doing, landline and wireless (including satellite) audit & optimizations, including negotiations of new contracts for clients.

Have recommended phone systems, but not recently—not a focus of my practice

Most proficient/current on VZW services cost reduction

Have a subcontractor helping me with some landline optimizations

I use TAMS in my practice. Hopefully, the other TAMS users in our group can show some example reports during their spotlights here.

**Business Mix and Specialization: (Elaborate below)**

- Initial Audit (IT/Telecom) \_\_\_\_\_ (Primary/Secondary/Not Applicable)
- Initial Audit (Other Expenses) \_\_\_\_\_ (Primary/Secondary/Not Applicable)
- Ongoing Expense Management \_\_\_\_\_ (Primary/Secondary/Not Applicable)
- Other IT/Telecom Projects \_\_\_\_\_ (Primary/Secondary/Not Applicable)

**Fee structure – Initial Audit: (Elaborate below).** *Note - disclosure of specific terms (% , years, rates, fixed fee, etc.) will be discussed at a later date, in your interview with the AEX consultant.*

- Contingency Fee \_\_\_\_\_ (Primary/Secondary/Not Applicable)
- Hourly Rate \_\_\_\_\_ (Primary/Secondary/Not Applicable)
- Fixed Fee \_\_\_\_\_ (Primary/Secondary/Not Applicable)
- Other Fee \_\_\_\_\_ (None/Minor/Some/Major)
- Retainer \_\_\_\_\_ (Yes/No - Do you expect/require a Retainer)

**Fee structure – Ongoing Expense Management: (Elaborate below).** *Note - disclosure of specific terms (% , years, rates, fixed fee, etc.) will be discussed at a later date, in your interview with the AEX consultant.*

- Contingency Fee \_\_\_\_\_ (Primary/Secondary/Not Applicable)
- Hourly Rate \_\_\_\_\_ (Primary/Secondary/Not Applicable)
- Fixed Fee \_\_\_\_\_ (Primary/Secondary/Not Applicable)
- Other Fee \_\_\_\_\_ (None/Minor/Some/Major)
- Retainer \_\_\_\_\_ (Yes/No - Do you expect/require a Retainer)



**SCTC AEX Partnering Profile – Greg Pittman**

***Society of Communications Technology Consultants  
Audit and Expense Management (AEX) Group Partnering Profile***

**Name:** Greg Pittman

**Company Name:** Pittman & Associates

**Company Address:** 2423 Sparrow Dr, Round Rock, TX 78681

**Business owner:** Yes (Y/N)

**# of years in business:** 18 Years **# of years SCTC Member:** 8 Years

**Office Telephone #:**(512) 341-7075 **Mobile Telephone #:**(512) 422-4009

**Email address:** gpittman@pittmanassociates.com

**Website:** pittmanassociates.com

**Are there any clients you prefer to avoid (size, industry, etc.)? Please describe.**

No Restrictions

**What are your "sweet spots" (Vertical, Size, Geography, Bill types, etc.)? Please describe**

Industries - Healthcare, Manufacturing, Education, Government

Bill Types – Traditional Voice, Wireless, Data, VoIP/SIP

## SCTC AEX Partnering Profile – Greg Pittman

### **Are there any skills, knowledge, experience you would like to highlight? Please describe**

Natl Accts –KONE Elevator, various John Deere Dealerships; Project Management – IT/Technology  
Former-end user in Healthcare organizations – understand their typical set ups

### **Business Mix and Specialization: (Elaborate below)**

- Initial Audit (IT/Telecom)      Secondary      (Primary/Secondary/Not Applicable)
- Initial Audit (Other Expenses)      Not Applicable      (Primary/Secondary/Not Applicable)
- Ongoing Expense Management      Secondary      (Primary/Secondary/Not Applicable)
- Other IT/Telecom Projects      Primary      (Primary/Secondary/Not Applicable)

Majority of business (75%) is on-going expense management and IT Project Management.

### **Fee structure – Initial Audit: (Elaborate below). *Note - disclosure of specific terms (% , years, rates, fixed fee, etc.) will be discussed at a later date, in your interview with the AEX consultant.***

- Contingency Fee      Secondary      (Primary/Secondary/Not Applicable)
- Hourly Rate      Primary      (Primary/Secondary/Not Applicable)
- Fixed Fee      Primary      (Primary/Secondary/Not Applicable)
- Other Fee      None      (None/Minor/Some/Major)
- Retainer      No      (Yes/No - Do you expect/require a Retainer)

Flexible – based on client and engagement types.

## SCTC AEX Partnering Profile – Greg Pittman

**Fee structure – Ongoing Expense Management: (Elaborate below).** *Note - disclosure of specific terms (% , years, rates, fixed fee, etc.) will be discussed at a later date, in your interview with the AEX consultant.*

- Contingency Fee      Secondary      (Primary/Secondary/Not Applicable)
- Hourly Rate          Primary      (Primary/Secondary/Not Applicable)
- Fixed Fee            Secondary      (Primary/Secondary/Not Applicable)
- Other Fee            None      (None/Minor/Some/Major)
- Retainer              No      (Yes/No - Do you expect/require a Retainer)

Ongoing Expense Management is an hourly fee to review several vendors invoices on an on-going basis. Executive reports can be produced for each vendor (identify changes, analyze why change occurred, provide recommendations)

## SCTC AEX Partnering Profile – Art Yonemoto

*Society of Communications Technology Consultants Audit and Expense Management (AEX) Group  
Partnering Profile*

**Name:** Art Yonemoto

**Company Name:** Yonemoto & Associates

**Company Address:** 11830 Southwick Ct., Dublin, CA 94568

**Business owner:** Yes (Y/N)

**# of years in business:** 29 Years

**# of years SCTC Member:** 10 Years

**Office Telephone #:** (925) 551-5300

**Mobile Telephone #:** (925) 800-3173

**Email address:** ayonemoto@yonemotoassociates.com

**Website:** yonemotoassociates.com

### **BIO Information: Experience (Before Consulting)**

- 3 Years – Schlumberger– Programmer (IBM System 3)
- 3 Years – Bank Of America- Project Manager
- 14 Years – ROLM/IBM/Siemens – MIS Manager, ROLM Analysis Center Manager

### **BIO Information: Other (Education, Certifications, Awards, etc.)**

- Bachelor Degree – Computer Science - University of California, Berkeley, CA
- Masters of Business Administration – San Jose State University, San Jose, CA

**SCTC AEX Partnering Profile – Art Yonemoto**

**Are there any clients you prefer to avoid (size, industry, etc.)? Please describe.**

No Restrictions – Government Audits (prefer Hourly over contingency)

**What are your “sweet spots” (Vertical, Size, Geography, Bill types, etc.)? Please describe**

Industries - Health Care, Manufacturing, Retail, Financial

Bill Types – Traditional Voice, Wireless, Data, VoIP/SIP

**Are there any skills, knowledge, experience you would like to highlight? Please describe**

Natl Accts – PeopleSoft, NetApp, IBM, Siemens, A&P, Household Bank, Solo/Dart Containerl

Focus on Financial & Executive reporting – Graphic reports (easy to understand, non technical)

**Business Mix and Specialization: (Elaborate below)**

- Initial Audit (IT/Telecom)      Primary      (Primary/Secondary/Not Applicable)
- Initial Audit (Other Expenses)      Not Applicable      (Primary/Secondary/Not Applicable)
- Ongoing Expense Management      Secondary      (Primary/Secondary/Not Applicable)
- Other IT/Telecom Projects      Secondary      (Primary/Secondary/Not Applicable)

Majority of business (90%) are audits. Once an audit is complete we offer ongoing support in Expense Management (5%) and Hourly(5%)

## SCTC AEX Partnering Profile – Art Yonemoto

**Fee structure – Initial Audit: (Elaborate below).** *Note - disclosure of specific terms (% , years, rates, fixed fee, etc.) will be discussed at a later date, in your interview with the AEX consultant.*

- Contingency Fee      Primary                      (Primary/Secondary/Not Applicable)
- Hourly Rate            Secondary                      (Primary/Secondary/Not Applicable)
- Fixed Fee                Secondary                      (Primary/Secondary/Not Applicable)
- Other Fee                None                              (None/Minor/Some/Major)
- Retainer                 No                                 (Yes/No - Do you expect/require a Retainer)

The vast majority (95%) are contingency. Will consider other engagement types based on client and situation.

**Fee structure – Ongoing Expense Management: (Elaborate below).** *Note - disclosure of specific terms (% , years, rates, fixed fee, etc.) will be discussed at a later date, in your interview with the AEX consultant.*

- Contingency Fee      Secondary                      (Primary/Secondary/Not Applicable)
- Hourly Rate            Secondary                      (Primary/Secondary/Not Applicable)
- Fixed Fee                Primary                         (Primary/Secondary/Not Applicable)
- Other Fee                None                              (None/Minor/Some/Major)
- Retainer                 No                                 (Yes/No - Do you expect/require a Retainer)

Ongoing Expense Management is Fixed fee to review several vendors invoices on a monthly basis. Executive reports are produced for each vendor (identify changes, analyze why change occurred, provide recommendations)

SCTC AEX Partnering Profile – Art Yonemoto

**Audit/Expense Management Focus: The following Matrix, provides the proficiency of the AEX consultant based on the Scope (Type of Bill) and Expertise/Skill (Analysis).**

		Credit	Errors	Optmz	Elimnt	Offers	Exempt	Tax	E-rate	Fraud	Contrct	DR	TEM
		A	B	C	D	E	F	G	H	I	J	K	L
Trad Voice	1	Yes	Yes *	Yes *	Yes *	Yes	Yes	Yes		Yes	Yes	Yes *	Yes
VoIP/SIP	2	Yes	Yes *	Yes *	Yes *	Yes	Yes	Yes					Yes
Trad Data	3	Yes	Yes	Yes	Yes	Yes		Yes					Yes
MPLS SD-wan	4												
Internet	5	Yes	Yes *	Yes *	Yes *	Yes *		Yes			Yes *		Yes
Equip	6		Yes			Yes							
Cloud	7	Yes	Yes	Yes	Yes						Yes		
Oth Subscr	8												
Wireless	9	Yes	Yes *	Yes *	Yes *	Yes *	Yes *	Yes		Yes *	Yes	Yes *	Yes
Video	10		Yes										
Global bills	11												
Other exp	12												

*See legend on next page.*

## SCTC AEX Partnering Profile – Art Yonemoto

### **Audit/Expense Management Focus - Legend:**

---

- 1 Traditional Phone Lines (Pots)
- 2 Voice over IP & SIP Voice Services
- 3 Traditional Data Services (Private Lines, OPX, Frame Relay)
- 4 MPLS & SD-WAN
- 5 Internet & other Access (Comcast, Spectrum, etc.)
- 6 Equipment /Hardware
- 7 Cloud Services
- 8 Other Subscription Services
- 9 Wireless (Smart phones, tablets, other)
- 10 Video Conferencing
- 11 Global (not US/Canada) Invoices
- 12 Other expenses outside of IT/Telecom

- A Credits
  - B Billing Errors (Contract/Tariff issues)
  - C Optimization of lines & Services
  - D Elimination of Unused and Redundant Services
  - E Competitive Offerings/Special Offers
  - F Unclaimed Exemptions/Incorrect classification
  - G Taxes, Surcharges, Fees
  - H E-rate
  - I Fraud/Abuse/Misuse
  - J Contracts (Negotiation/Renegotiations)
  - K Disaster Recovery/Model Office/Best Practices
  - L Ongoing Monthly Expense Management (TEM)
-



**SCTC AEX Partnering Profile – Paul Anker**

***Society of Communications Technology Consultants  
Audit and Expense Management (AEX) Group Partnering Profile***

**Name:** Paul Anker

**Company Name:** Abilita of Northville

**Company Address:** 45924 7 Mile Road, Northville, MI 48167

**Business owner:** Yes (Y/N)

**# of years in business:** 11 Years (40 years in “Telecom”)      **# of years SCTC Member:** 6 Years

**Office Telephone #:** (248) 412-0140      **Mobile Telephone #:** (248) 756-5099

**Email address:** panker@abilita.com

**Website:** abilita.com/panker

**Education:** MBA in Marketing (University of Michigan), BA Hope College)

**Corporate Experience:** Vendor Organizations for Unified Communications, IVR, Contact Center, etc.

**Strengths:** Analysis Tools, Executive Reporting,

SCTC AEX Partnering Profile – Paul Anker

**Are there any clients you prefer to avoid (size, industry, etc.)? Please describe.**

No Restrictions

**What are your “sweet spots” (Vertical, Size, Geography, Bill types, etc.)? Please describe**

Industries – Local Government

Bill Types – Traditional Voice, Wireless, Data, VoIP/SIP

**Are there any skills, knowledge, experience you would like to highlight? Please describe**

Local Government & Non-Profits – Small to Medium sized Cities, Counties, Community Mental Health,

Focus on Financial & Executive reporting – Graphic reports (easy to understand, non technical)

**Business Mix and Specialization: (Elaborate below)**

- Initial Audit (IT/Telecom)      Primary      (Primary/Secondary/Not Applicable)
- Initial Audit (Other Expenses)      Secondary      (Primary/Secondary/Not Applicable)
- Ongoing Expense Management      Secondary      (Primary/Secondary/Not Applicable)
- Other IT/Telecom Projects      Secondary      (Primary/Secondary/Not Applicable)

Majority of business (60%) are audits. Once an audit is complete, we offer ongoing support in Hourly (20%) and Expense Management / Retainers (20%)

## SCTC AEX Partnering Profile – Paul Anker

**Fee structure – Initial Audit: (Elaborate below).** *Note - disclosure of specific terms (% , years, rates, fixed fee, etc.) will be discussed at a later date, in your interview with the AEX consultant.*

- Contingency Fee      Primary                      (Primary/Secondary/Not Applicable)
- Hourly Rate            Secondary                      (Primary/Secondary/Not Applicable)
- Fixed Fee                Secondary                      (Primary/Secondary/Not Applicable)
- Other Fee                None                              (None/Minor/Some/Major)
- Retainer                 No                                 (Yes/No - Do you expect/require a Retainer)

The vast majority (80%) are contingency. Will consider other engagement types based on client and situation.

**Fee structure – Ongoing Expense Management: (Elaborate below).** *Note - disclosure of specific terms (% , years, rates, fixed fee, etc.) will be discussed at a later date, in your interview with the AEX consultant.*

- Contingency Fee      Secondary                      (Primary/Secondary/Not Applicable)
- Hourly Rate            Secondary                      (Primary/Secondary/Not Applicable)
- Fixed Fee                Primary                         (Primary/Secondary/Not Applicable)
- Other Fee                None                              (None/Minor/Some/Major)
- Retainer                 No                                 (Yes/No - Do you expect/require a Retainer)

Ongoing Expense Management is Fixed fee to review several vendors invoices on a monthly basis. Executive reports are produced for each vendor (identify changes, analyze why change occurred, provide recommendations)

## SCTC AEX Partnering Profile – Paul Anker

**Audit/Expense Management Focus: The following Matrix, provides the proficiency of the AEX consultant based on the Scope (Type of Bill) and Expertise/Skill (Analysis).**

			Credit	Errors	Optmz	Elimnt	Offers	Exempt	Tax	E-rate	Fraud	Contrct	DR	TEM
			A	B	C	D	E	F	G	H	I	J	K	L
Trad Voice	1		Yes	Yes *	Yes *	Yes *	Yes	Yes	Yes		Yes	Yes	Yes	Yes
VoIP/SIP	2		Yes	Yes *	Yes *	Yes *	Yes	Yes	Yes		Yes	Yes	Yes	Yes
Trad Data	3		Yes	Yes	Yes	Yes	Yes	Yes	Yes		Yes	Yes	Yes	Yes
MPLS SD-wan	4		Yes	Yes	Yes	Yes	Yes	Yes	Yes					Yes
Internet	5		Yes	Yes *	Yes *	Yes *	Yes *		Yes			Yes *		Yes
Equip	6			Yes			Yes							Yes
Cloud	7		Yes	Yes	Yes	Yes						Yes		Yes
Oth Subscr	8													
Wireless	9		Yes	Yes *	Yes *	Yes *	Yes *	Yes *	Yes		Yes *	Yes	Yes *	Yes
Video	10			Yes	Yes	Yes	Yes							
Global bills	11													
Other exp	12		Yes	Yes	Yes	Yes	Yes	Yes						

*See legend on next page.*

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## SCTC AEX Partnering Profile – Paul Anker

### **Audit/Expense Management Focus - Legend:**

---

- 1 Traditional Phone Lines (Pots)
- 2 Voice over IP & SIP Voice Services
- 3 Traditional Data Services (Private Lines, OPX, Frame Relay)
- 4 MPLS & SD-WAN
- 5 Internet & other Access (Comcast, Spectrum, etc.)
- 6 Equipment /Hardware
- 7 Cloud Services
- 8 Other Subscription Services
- 9 Wireless (Smart phones, tablets, other)
- 10 Video Conferencing
- 11 Global (not US/Canada) Invoices
- 12 Other expenses outside of IT/Telecom

- A Credits
  - B Billing Errors (Contract/Tariff issues)
  - C Optimization of lines & Services
  - D Elimination of Unused and Redundant Services
  - E Competitive Offerings/Special Offers
  - F Unclaimed Exemptions/Incorrect classification
  - G Taxes, Surcharges, Fees
  - H E-rate
  - I Fraud/Abuse/Misuse
  - J Contracts (Negotiation/Renegotiations)
  - K Disaster Recovery/Model Office/Best Practices
  - L Ongoing Monthly Expense Management (TEM)
-

## SCTC AEX Partnering Profile – Agustin Argelich

### ***Society of Communications Technology Consultants Audit and Expense Management (AEX) Group Partnering Profile***

**Name:** Agustin Argelich

**Company Name:** Argelich Network S.L.

**Company Address:** Rambla Catalunya, 112 08008 Barcelona. Velazquez, 27 28001 Madrid.

**Business owner:** Yes

**# of years in business:** 29 Years                      **# of years SCTC Member:** 15 Years

**Office Telephone #:** +34 934151235    **Mobile Telephone #:**        +34 610595053

**Email address:** aac@argelich.com

**Website:** argelich.com

**LinkedIn:** es.linkedin.com/in/agustinargelich/

**Twitter:** @aargelich

**Youtube:** youtube.com/c/AgustinArgelich15

### **Background:**

Agustín is a Telecom Engineer by Ramon Llull University (Barcelona) and a Professor of leadership at Ingenio School (Lleida University). Author of Analyze, Act, Advance, a book about how to build a virtuous cycle of hope, innovation, renewal, and continuous improvement. Principal consultant of Argelich Networks, an independent digital technology (Information and communications technologies) and management consultancy boutique. He founded it after the Barcelona'92 Olympic Games when he was one of the youngest project leaders as Technological Director of the IX Paralympic Games. For 30 years, he has been leading significant digital technology projects for business and public

## **SCTC AEX Partnering Profile – Agustin Argelich**

organizations. Expert in Unified Communications and Collaboration and telecom infrastructures. He is a proud member of the Society of Communications Technologies Consultants International ([www.sctcconsultants.org](http://www.sctcconsultants.org)), he served as a board member for eight years, seven as Chairman International Affairs Committee and two as Vice President. He represents in Spain the Think Tank Intelligent Community Forum ([www.intelligentcommunity.org](http://www.intelligentcommunity.org)) and is member of the international jury of the Intelligent Community of the year award. He is a recognized international speaker in ICT technology, innovation, change management, and leadership. Before the Olympics, Agustin worked as Telecom Manager in Asco Nuclear Power Plant and served as Lieutenant in Spanish Air Force. Agustin is married to M<sup>a</sup> Eugenia for 30 years, and they are parents of two daughters and four sons.

### **Are there any clients you prefer to avoid (size, industry, etc.)? Please describe.**

No Restrictions

### **What are your “sweet spots” (Vertical, Size, Geography, Bill types, etc.)? Please describe**

International Audits. Europe and Latam

Any vertical

All type of services including cloud services.

### **Are there any skills, knowledge, experience you would like to highlight? Please describe**

Deep knowledge of European Market. Experience discussing agreements with big European carriers like Orange, Telefonica, BT, etc.

## SCTC AEX Partnering Profile – Agustin Argelich

### **Business Mix and Specialization: (Elaborate below)**

- Initial Audit (IT/Telecom)      Primary      (Primary/Secondary/Not Applicable)
- Initial Audit (Other Expenses)      Secondary      (Primary/Secondary/Not Applicable)
- Ongoing Expense Management      Primary      (Primary/Secondary/Not Applicable)
- Other IT/Telecom Projects      Primary      (Primary/Secondary/Not Applicable)

Majority of business (90%) are audits. Once an audit is complete we offer ongoing support in Expense Management (5%) and Hourly(5%)

### **Fee structure – Initial Audit: (Elaborate below). Note - disclosure of specific terms (% , years, rates, fixed fee, etc.) will be discussed at a later date, in your interview with the AEX consultant.**

- Contingency Fee      Primary      (Primary/Secondary/Not Applicable)
- Hourly Rate      Secondary      (Primary/Secondary/Not Applicable)
- Fixed Fee      Secondary      (Primary/Secondary/Not Applicable)
- Other Fee      None      (None/Minor/Some/Major)
- Retainer      Yes      (Yes/No - Do you expect/require a Retainer)

We are very flexible. We adapt to client’s requirements. Companies prefer contingency and governments prefer fix price.

### **Fee structure – Ongoing Expense Management: (Elaborate below). Note - disclosure of specific terms (% , years, rates, fixed fee, etc.) will be discussed at a later date, in your interview with the AEX consultant.**

- Contingency Fee      Secondary      (Primary/Secondary/Not Applicable)
- Hourly Rate      Secondary      (Primary/Secondary/Not Applicable)
- Fixed Fee      Primary      (Primary/Secondary/Not Applicable)
- Other Fee      None      (None/Minor/Some/Major)
- Retainer      Yes      (Yes/No - Do you expect/require a Retainer)



## **SCTC AEX Partnering Profile – Agustin Argelich**

We like long term agreements with our clients. A mix of a success fee (contingency) + plus a monthly quote (retainer). We like to align aour services with the duration of the agreements between our clients and carriers than we manage.

We like to provide a complete service. Audit, renegotiation of contracts or discuss a new agreement and ongoing expense management.

**SCTC AEX Partnering Profile – Agustin Argelich**

**Audit/Expense Management Focus: The following Matrix, provides the proficiency of the AEX consultant based on the Scope (Type of Bill) and Expertise/Skill (Analysis).**

		Credit	Errors	Optmz	Elimnt	Offers	Exempt	Tax	E-rate	Fraud	Contrct	DR	TEM
		A	B	C	D	E	F	G	H	I	J	K	L
Trad Voice	1	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes		Yes	Yes *	Yes *	Yes *
VoIP/SIP	2	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes		Yes	Yes *		Yes *
Trad Data	3	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes			Yes *	Yes *	Yes *
MPLS SD-wan	4	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes			Yes *	Yes *	Yes *
Internet	5	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes			Yes *		Yes *
Equip	6	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *				Yes *		Yes *
Cloud	7	Yes	Yes	Yes	Yes	Yes	Yes				Yes		Yes
Oth Subscr	8												
Wireless	9	Yes*	Yes *	Yes *	Yes *	Yes *	Yes *	Yes		Yes	Yes*	Yes *	Yes *
Video	10	Yes	Yes	Yes	Yes	Yes	Yes				Yes		Yes
Global bills	11	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *				Yes *	Yes *	Yes *
Other exp	12												

*See legend on next page.*

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## SCTC AEX Partnering Profile – Agustin Argelich

### **Audit/Expense Management Focus - Legend:**

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- 1 Traditional Phone Lines (Pots)
- 2 Voice over IP & SIP Voice Services
- 3 Traditional Data Services (Private Lines, OPX, Frame Relay)
- 4 MPLS & SD-WAN
- 5 Internet & other Access (Comcast, Spectrum, etc.)
- 6 Equipment /Hardware
- 7 Cloud Services
- 8 Other Subscription Services
- 9 Wireless (Smart phones, tablets, other)
- 10 Video Conferencing
- 11 Global (not US/Canada) Invoices
- 12 Other expenses outside of IT/Telecom

- A Credits
  - B Billing Errors (Contract/Tariff issues)
  - C Optimization of lines & Services
  - D Elimination of Unused and Redundant Services
  - E Competitive Offerings/Special Offers
  - F Unclaimed Exemptions/Incorrect classification
  - G Taxes, Surcharges, Fees
  - H E-rate
  - I Fraud/Abuse/Misuse
  - J Contracts (Negotiation/Renegotiations)
  - K Disaster Recovery/Model Office/Best Practices
  - L Ongoing Monthly Expense Management (TEM)
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## SCTC AEX Partnering Profile – Chris Beck

### ***Society of Communications Technology Consultants Audit and Expense Management (AEX) Group Partnering Profile***

**Name:** Chris Beck

**Company Name:** Ben Sanford & Associates

**Company Address:** 306 Ridgewood Drive, Lewisville, TX 75067-8274

**Business owner:** Yes

**# of years in business:** 39 Years                      **# of years SCTC Member:** 29 Years

**Office Telephone #:** 817-316-0500                      **Mobile Telephone #:** 817-371-2944

**Email address:** chris@bsacon.com

**Website:** bsacon.com

**LinkedIn:** [es.linkedin.com/in/chrisbeck/](https://es.linkedin.com/in/chrisbeck/)

**Christopher Beck**, Senior Consultant, received a Bachelor of Arts degree from the University of Wisconsin-Madison in 1975.

From 1975 to 1984, he was employed by Southwestern Bell and AT&T Information Systems as a Communications Consultant, specializing in the financial and professional service industries, employed him. He received extensive training on many different aspects of the telephone industry from both companies.

Then in 1984-1985, he was associated with a local interconnect company as a Technical Marketing Specialist, which involved analysis of the vast array of competitive systems and vendors available in the marketplace.

Since becoming an independent consultant in 1985, Mr. Beck's clients have included such entities as city

## **SCTC AEX Partnering Profile – Chris Beck**

and county government, all levels of education, manufacturing, oil and gas, service, financial, insurance, legal, and medical care.

Mr. Beck has designed and implemented Voice over Internet Protocol (VoIP), TDM PBX, hybrid, and key systems from 20 to 1500 stations. He has also designed and implemented a multitude of peripheral systems, including Automated Attendant, Voice Mail, Interactive Voice Response (IVR), Automated Call Distribution (ACD), Call Detail Recording (CDR), and more.

He has designed and overseen implementation of both inside and outside cable plant for voice and data, as well as other communications media.

Mr. Beck has evaluated networks of local, nationwide and international clients and then has designed and managed the implementation of new, more cost-effective networks for those clients.

He has audited telecommunications billings for hundreds of businesses over the last three plus decades. The results have ranged from finding clients billed totally correctly to saving clients thousands of dollars per month and getting them hundreds of thousands of dollars in refunds from the carriers.

Mr. Beck is a past Board member of the Society of Communications Technology Consultants (SCTC) and continues to uphold their code of ethics.

He has been with BSA since 1985 and in the telecommunications industry since 1975.

SCTC AEX Partnering Profile – Chris Beck

**Are there any clients you prefer to avoid (size, industry, etc.)? Please describe.**

No Restrictions

**What are your “sweet spots” (Vertical, Size, Geography, Bill types, etc.)? Please describe**

USA Audits.

Any vertical, but especially local government and education.

All type of services including cloud services.

**Are there any skills, knowledge, experience you would like to highlight? Please describe**

Deep knowledge of local telephone companies, including tariffed services.

**Business Mix and Specialization: (Elaborate below)**

- Initial Audit (IT/Telecom)      Primary      (Primary/Secondary/Not Applicable)
- Initial Audit (Other Expenses)      Secondary      (Primary/Secondary/Not Applicable)
- Ongoing Expense Management      Primary      (Primary/Secondary/Not Applicable)
- Other IT/Telecom Projects      Primary      (Primary/Secondary/Not Applicable)

Majority of business (80%) are audits, but also design and acquire systems and networks.

## SCTC AEX Partnering Profile – Chris Beck

**Fee structure – Initial Audit: (Elaborate below).** *Note - disclosure of specific terms (% , years, rates, fixed fee, etc.) will be discussed at a later date, in your interview with the AEX consultant.*

- Contingency Fee      Primary              (Primary/Secondary/Not Applicable)
- Hourly Rate            Secondary              (Primary/Secondary/Not Applicable)
- Fixed Fee                Secondary              (Primary/Secondary/Not Applicable)
- Other Fee                None                      (None/Minor/Some/Major)
- Retainer                 No                         (Yes/No - Do you expect/require a Retainer)

We are very flexible. We adapt to client’s requirements.

**Fee structure – Ongoing Expense Management: (Elaborate below).** *Note - disclosure of specific terms (% , years, rates, fixed fee, etc.) will be discussed at a later date, in your interview with the AEX consultant.*

- Contingency Fee      Secondary              (Primary/Secondary/Not Applicable)
- Hourly Rate            Secondary              (Primary/Secondary/Not Applicable)
- Fixed Fee                Primary                  (Primary/Secondary/Not Applicable)
- Other Fee                None                      (None/Minor/Some/Major)
- Retainer                 No                         (Yes/No - Do you expect/require a Retainer)

SCTC AEX Partnering Profile – Chris Beck

**Audit/Expense Management Focus: The following Matrix, provides the proficiency of the AEX consultant based on the Scope (Type of Bill) and Expertise/Skill (Analysis).**

		Credit	Errors	Optmz	Elimnt	Offers	Exempt	Tax	E-rate	Fraud	Contrct	DR	TEM
		A	B	C	D	E	F	G	H	I	J	K	L
Trad Voice	1	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *			Yes *	Yes *	Yes *
VoIP/SIP	2	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *			Yes *	Yes	Yes *
Trad Data	3	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *			Yes *		Yes *
MPLS SD-wan	4	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *			Yes *		Yes *
Internet	5	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *			Yes *		Yes *
Equip	6	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *	Yes *			Yes *	Yes	Yes *
Cloud	7	Yes	Yes	Yes	Yes	Yes	Yes	Yes			Yes		Yes
Oth Subscr	8	Yes	Yes	Yes	Yes	Yes	Yes	Yes			Yes		Yes
Wireless	9	Yes	Yes	Yes	Yes	Yes	Yes	Yes			Yes		Yes
Video	10												
Global bills	11												
Other exp	12												

*See legend on next page.*



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