



# Who, What, When & Why?

## Who? If you are a:

1. Mid-market Private Equity firm
2. Venture Capital partnership
3. Limited Partner
4. CEO or other CXX
5. Board Director
6. Attorney, Investment Banker or other advisor

## When? If

1. An expert third party opinion helps to mitigate risk
2. An expert, third party opinion adds value
3. Visibility into or the soundness of an IT product or system is required
4. Current market strategy is not working
5. Real-world intelligence is required in an existing or new market
6. Making an investment
7. Doing a merger or acquisition
8. Reviewing portfolio company performance
9. Require an independent Fair Market Valuation
10. Assessing Alternative Investment portfolio relationships

## Why: Areas of focus:

- Development process (including support and documentation):
  - Traceability
  - Quality Assurance
  - Configuration Management
  - Disaster Recovery
  - Project Advocate Oversight
- Operations:
  - Resource skills/capabilities
  - Workflow
  - Infrastructure review for non technology companies (internal IT)
- Architecture/IP/Systems:
  - Product for a specific market
  - Scalability



- Requirements Audit
- Analysis and Design Audit
- Architecture Audit
- Technology and Tool Selection
- Code:
  - Code Audit
  - Code compliance
- Project assurance/oversight:
  - Green, yellow, red light IT governance
  - Integration with Sales/Marketing/Corporate goals
  - Budget valuation
- Market Diligence research and strategy
  - Market strategy
  - Market research
  - Customer surveys
- Fund and Corporate Advisory
  - Fair Market Valuation
  - Portfolio Evaluation
  - Fund Performance
  - General and Limited Partner relationships
  - Quality Assurance Program (QAP)

### **What For? Some questions we can answer:**

- Does the technology do what 'they' say it does?
- Can I be protected from liability as a result of this transaction?
- Can process and deliverables be predictably repeated or better yet, optimized?
- Is this business really worth paying for?
- What is the strategy?
- What should the strategy be?
- Are there alternative markets?
- Are technology selections appropriate?
- Is technology budget appropriate?
- Is IT staff appropriate?
- Are third-party vendors (outsourced) appropriate?
- Will technology survive next 12-24 months with corporate direction?
- What are the approaching 'red flags' to prepare for/prevent?
- Is the market strategy appropriate for the time and market?
- What are the conditions of other markets and what are the probabilities of success of entering those markets?