

TYPICAL DEAL REVIEW ANALYSIS SAMPLE

The image displays four screenshots of Forsythe invoices and contracts. The top-left screenshot shows an invoice header with the Forsythe logo and company information. The top-right screenshot shows a detailed table of line items with columns for item number, description, quantity, and price. The bottom-left screenshot shows another invoice header, and the bottom-right screenshot shows another detailed table of line items. The tables contain various technical specifications and pricing details for hardware and software support.

1) Client provides source material of deal (contracts, invoices, etc.)

ICD reviewed INVOICE 733178, which was summarized into columns A-J below. ICD added columns K-O, bringing in a comparison of the list to effective off the list issue that IDC had to resolve was determining the effective years covered for each SKU, as the invoice does not state an overall term covered, a QIC handled this issue by creating an effective list "on list" based on how we interpret the years covered "Y" QTY". This is our interpretation and must be per client.

Using our assumptions above, we determined in ROW 1242 that NW received an overall 13% discount off list for HW-Maint. While this may mean us to believe that neither other provides a wide range of discounts, or our effective terms need to be reviewed. Note we left the to Likewise, software maintenance also provides an 18% overall discount (ROW 1252), but again this is open to interpretation. Neither show any in some cases that even monthly terms are shown, for example to explain the difference in ROW 1247 from 1264, same SKU for different pro. Your peers receive 15-45% off list on subscriptions. The only indication is that NW receives around 14% (ROWS 1260-1265), but we need more

Line #	Category	Item Number	Description	Unit	Qty	Unit Price	Total Price
1242	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1243	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1244	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1245	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1246	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1247	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1248	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1249	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1250	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1251	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1252	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1253	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1254	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1255	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1256	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1257	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1258	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1259	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1260	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1261	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1262	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1263	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1264	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00
1265	HW - MAINT	HW-COR-0200-24T	CORE SUPPORT FOR COR	1	1	100.00	100.00

2) IDC provides a detailed financial review of the deal - confirming quoting, pricing and discounts identifying discrepancies/

Juniper Analysis

- We reviewed a hardware and software support contract
- Forsythe's invoice did not specify an overall service term, however some SKUs appeared to quote out three years and others five years
- IDC estimated an effective years covered and list price for each SKU and determined your discounts off list
- HW-Maint – NW received an overall 13% discount off list, in line with the low-end range of your peer class.
- SW-Maint – NW received an overall 18% discount, also in the low-end range of your peer class

IDC Guidance – Have Forsythe declare the term coverage for each line item which may explain wide variation in discounts.

3) IDC provides specific guidance on pricing versus your peer group and recommended deal improvements