



Developing a Business-Centric IT Approach for Growing Mid-Sized Businesses

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**Laurie McCabe, VP
SMB Insights & Solutions**

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**AMI-Partners
546 Fifth Avenue
Suite 22
New York, NY 10036
1-212-944-5100
www.ami-partners.com
Ask_ami@ami-partners.com
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Developing a Business-Centric IT Approach for Growing Mid-Sized Businesses

As technology evolves at an ever-quickening pace, so has its role in business. Today, it's not enough for technology to simply support the business; it must enable it.

Like large enterprises, growing mid-market businesses need IT solutions to automate operations, respond more effectively to changing market conditions, help employees to do their jobs anywhere, anytime, and smooth sales and service transactions. As reliance on technology increases, IT organizations can find themselves managing hundreds to thousands of servers, PCs, applications and network devices. Since IT performance has a direct impact on business outcomes, almost any type of IT outage or inability to service users can adversely affect business.

Consequently, growing businesses often face a dilemma. On one hand, they need systems management solutions with enterprise-class capabilities, tailored to industry and other specific requirements. On the other, they face budget limitations and IT staffing constraints. Given these realities, how can IT prevent, manage and respond to potential threats, and also establish a proactive systems and service management approach that adapts to new business demands?

This paper looks at how growing mid-market companies can tune IT priorities and operations to meet business requirements. We start by discussing how business-centric IT alignment can maximize IT and business value, while minimizing risks. Then, we examine the concept of governance and risk management, and how companies can apply this approach to align IT investments to business goals. We explore the core elements of effective systems and service management, data storage and protection, information security management—and the questions companies need to consider as they build a governance and risk management plan. We wrap up with a brief look at how IBM Tivoli's IT management solutions are helping mid-market IT organizations keep their businesses running at peak performance.

Section 1: Understanding the Need for Business-Centric IT

As businesses grow, so do IT requirements. Companies need IT solutions to automate business processes, improve internal efficiencies and make employees more productive. In addition, IT solutions are becoming essential to streamlining customer, partner and supplier interactions, meeting compliance requirements, and making better business decisions. For a growing number of companies, it's tough to find a facet of the business that *doesn't* depend on IT.

As a result, any IT vulnerability can seriously jeopardize the company. Potential threats include system malfunctions, network sabotage, power outages, security breaches, identity theft, human error and natural and manmade disasters. Should any of these occur, they can result in lasting financial loss, brand damage, legal liabilities, and other extremely unpleasant consequences.

Because companies are frequently unwilling to report their mistakes and the costs of those mistakes, it's next to impossible to put an exact dollar figure on financial consequences. But, business losses are not trivial. For example, the 2006 CSI/FBI Computer Crime and Security Survey, which surveyed 615 U.S. small, medium and large businesses, found that:

- 65% of respondents experienced a virus attack in the last 12 months, resulting in almost \$16 million in financial loss.
- 47% reported laptop thefts, causing over \$6 million in losses.
- 32% suffered from unauthorized access, costing their companies over \$10 million.

Corporate damage resulting from security breaches such as these can extend far beyond immediate financial impact. In a study by Javelin Strategy & Research, 79% of consumers said they would be unlikely to continue shopping at a store once they had learned of a data breach there.

Catastrophes, both natural and manmade, can also cause devastating losses if businesses, governments and first responder organizations are not prepared to swiftly counter and recover from them. For example, according to the National Archives and Records Administration in Washington, D.C, after the August 2003 blackout in the Northeast, 93% percent of companies that lost their data center for 10 days or more filed for bankruptcy within one year of the disaster, and 50% filed immediately.

Although data losses resulting from external forces often cause the most concern, system failure and human error are actually the top causes of data loss. 500 times more data is stored on hard drives today than 10 years ago, pressuring IT organizations to maintain increasing amounts of digital data reliably, both for internal purposes and to satisfy regulatory and auditing requirements.

While most firms perform regular data back-ups, tools and procedures often fail, for several reasons, including malfunctioning hardware and storage media, corrupted data, or because backup software isn't reset to include new files or applications. Whatever the reason, costs to replace the data and restore employee productivity can be enormous.

Businesses also face stiff penalties if they are unable to store, retrieve, monitor and transmit data in accordance with regulatory requirements. For instance, in the U.S., businesses that process credit card transactions are liable if they store card data in violation of the Payment Card Industry Data Security Standard (PCI DSS). Under this regulation, any company processing, storing, or transmitting credit card numbers must be PCI DSS compliant, or risk losing the ability to process credit card payments.

Meanwhile, in addition to safeguarding data and IT assets, IT organizations must also provide services—such as help desk management, single sign-on authentication and patch management—to help maximize productivity. And, on top of keeping everything up and running, mid-market firms must have the agility to efficiently roll out new software solutions, or upgrade existing ones, as required by the business. With these types of capabilities, IT organizations can move beyond fire-drill mode, and provide businesses with proactive guidance and support.

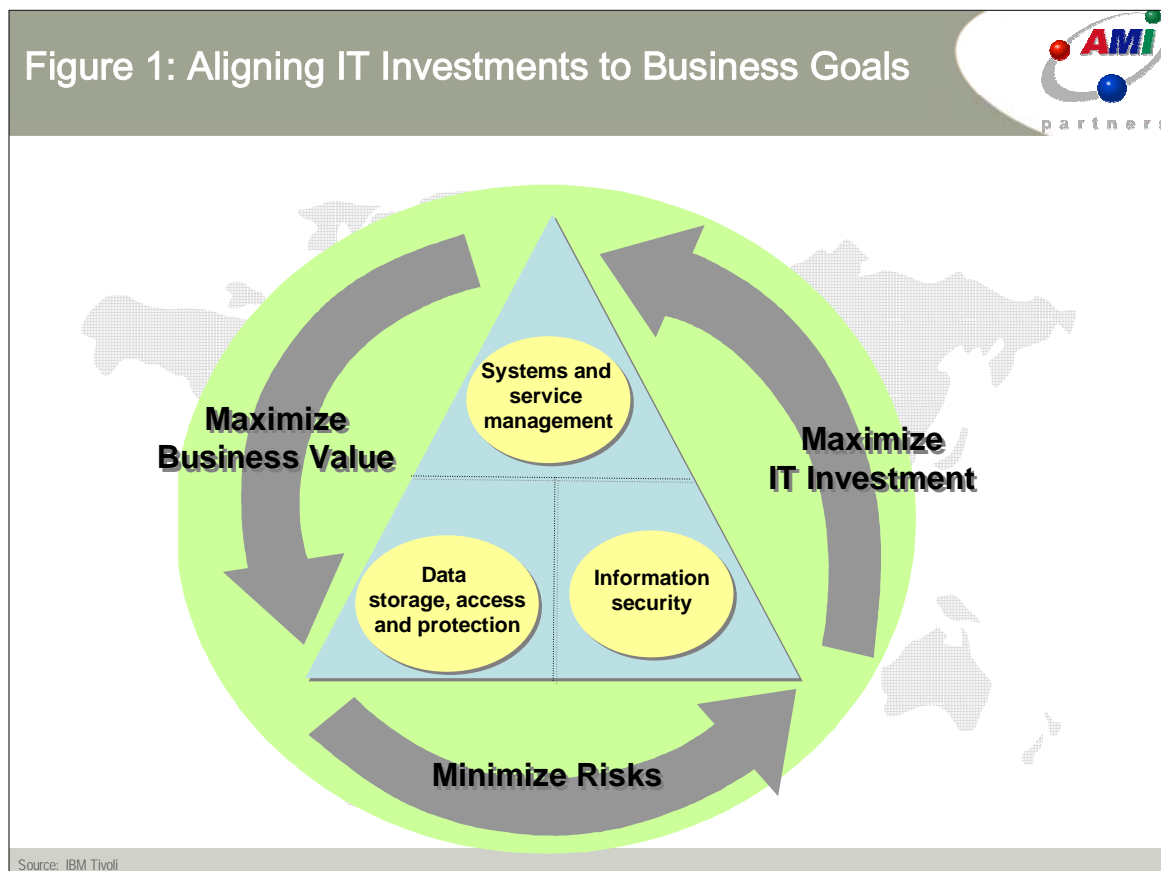
Section 2: Applying a Governance and Risk Management Approach

“Governance and risk management” is a term used increasingly to describe a model to align IT investments to core business objectives. Taking a governance and risk management approach, businesses can maximize IT and business value, while minimizing risks. Though there are many elements to governance and risk management, three core operational areas are central to achieving this goal:

1. ***Data storage, access and protection.*** Adequate storage capacity and solid backup functionality are essential to ensuring that companies protect, access and recover data—regardless of where it is. What information needs to be stored, who can access different types of information, when can information be moved from active to archived storage, and when can it be deleted? The right data protection tools, practices and procedures are critical to effectively store, manage and retrieve information that users need to do their jobs, and to comply with audits, regulatory requirements and litigation requests. Policy-based solutions, using tiered and automated storage and protection, can align storage and protection to the value of different types of data in the company.
2. ***Information Security.*** Businesses must maintain data confidentiality and integrity across multiple applications and devices, and different types of internal and external users. An comprehensive, end-to-end approach to identity and access management is vital to helping companies ensure that they can readily identify and prevent security threats; flexibly provision and manage internal and external user access; and conduct auditing necessary to comply with regulatory and service-level agreement requirements.

3. **Systems and Service Management.** The demands of managing more people, processes, information and solutions at higher service levels can be difficult for growing businesses. Yet smooth, responsive management of these business services is imperative for peak performance. IT must have the agility to support existing applications and users, and to roll out new services and applications quickly and flexibly.

Many solutions are available to help companies address needs in these areas. However, the sheer number and assortment of products and approaches available can be confusing and even overwhelming. Driven by the need for quick results, and without a clear view of big picture goals, businesses can end up with many disparate point products that don't work together. This can create both short-term gaps, as well as integration and scalability problems over time.



Section 3: Developing an Approach for Business-Centric IT

How can companies develop a pragmatic approach that protects IT assets, resolves problems quickly, and also provides insights to help enable business momentum?

Growing mid-market businesses are probably managing upwards of 50 to several hundred servers, and supporting heterogeneous operating systems and databases. Most have already invested in systems management tools for more efficient operations. As requirements expand, however, many companies need enterprise-class capabilities, tailored to industry and other specific demands of the business.

However, IT staffs in midsize businesses often lack the skills or time necessary to adequately evaluate, implement and/or manage these solutions. Trained, experienced IT solution providers can help companies accelerate the evaluation and deployment process, prioritize needs, and develop a comprehensive approach that addresses both immediate, short-term needs and long-term objectives. Qualified solution providers can help companies to:

- ***Conduct an internal assessment and prioritize.*** An internal assessment should identify mission-critical business functions, inventory the systems, networks, data, applications, policies and procedures that support these functions, and determine gaps and weaknesses in current operations. **Figure 2** offers a high-level overview of some of the key questions that customers must address in this process. As an outcome, companies should be able to prioritize which existing gaps or vulnerabilities could potentially have the most severe impact on the business.
- ***Create an incremental, integrated plan.*** Filling the most critical pain points first typically offers the fastest and highest return, laying the groundwork for additional initiatives. In addition to addressing top priorities, a good plan will also look ahead to anticipated needs, and map out a strategy to deploy, integrate and/or scale solutions over time.
- ***Evaluate how well potential solutions measure up to requirements.*** With many choices available, customers can be demanding about getting best-fit solutions that meet specific criteria, such as time and ease of deployment, costs and resource requirements for ongoing support and maintenance, and specific functionality and reporting capabilities. **Figure 3** provides examples of questions that customers should pose to vendors as part of the evaluation process.

Figure 2: Internal Assessment Guidelines

<i>Data Protection</i>	<i>Security</i>	<i>Systems and Service Management</i>
Can you capture and store data in a reliable, unaltered way?	Do you have a defined security policy that addresses multiple internal and external requirements?	Have you prioritized processes and information assets to business need and impact, and allocated resources appropriately?
Can the right people access data when they need it?	Can authorized users readily access the information they need?	Can you efficiently track, log and resolve support incidences?
Can you manage data time and cost effectively across multiple devices and locations?	Can you consistently maintain security policies across different business units, locations and resources?	Are you providing fast, responsive and satisfactory service to users?
How well does your data backup, retrieval and recovery system protect against damage, deletion, alteration or loss?	Can you validate effective controls in response to audit requests?	Do you have the visibility you need into support costs to reduce administrative resource requirements?
Do you have the audit controls necessary to prove proper handling of information throughout its lifecycle?	How well are servers, networks, desktops and other systems protected against hackers and other security breaches?	Can you evaluate available solutions, bring new services on board, and make changes to existing customer services, quickly and reliably?
Do you have an automated, consistent method to dispose of data that no longer needs to be stored?	Can you consistently update employee identity changes from new hires to exit across multiple systems and applications?	Do you have an automated patch management system?
How fast can you recover from an unplanned system, network or power outage?	Can remote employees securely access applications from anywhere, anytime?	Do you have procedures in place to help manage change to reduce unintended negative outcomes?
Can you satisfy growing storage needs?		What mechanisms and tools do you have to plan for future requirements?

Figure 3: Key Solution Considerations and Questions for Vendors

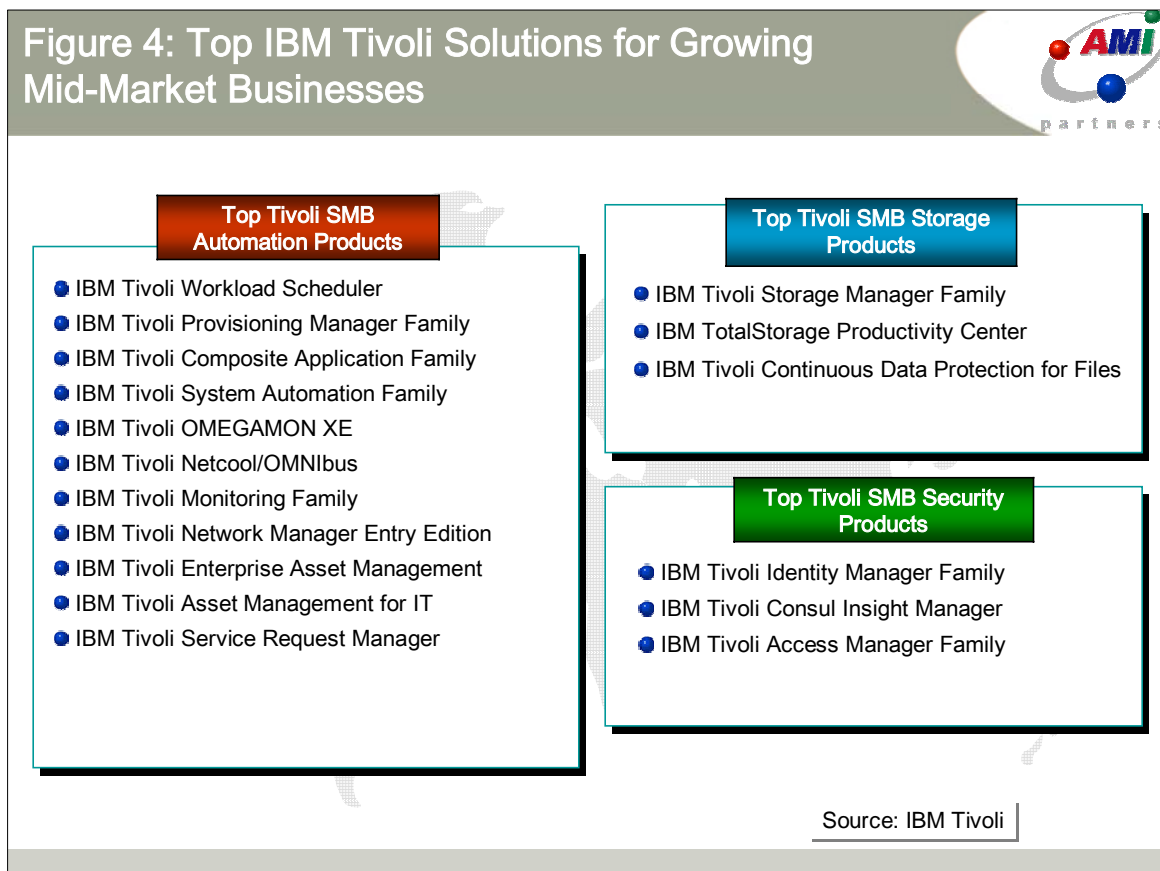
<i>Key Considerations</i>	<i>Questions for Vendors</i>
Time and ease of deployment	<ul style="list-style-type: none"> • How long does the average deployment take for companies with similar needs to mine? • Does the vendor offer simplified installation, configuration wizards, etc. to streamline deployment? • What types of resources (internal and external) do I need for a successful implementation?
Pricing and return-on-investment	<ul style="list-style-type: none"> • What are the costs for license, maintenance, implementation and training services? • Does the vendor offer fixed price, fixed scope options?
Ease of use	<ul style="list-style-type: none"> • Does the vendor offer a browser-based user interface, or does it require that I install client software? • What type of self-service and automation capabilities does the solution have to minimize administration expenses? • Does the application give administrators/users anytime, anywhere access?
Best practices	<ul style="list-style-type: none"> • Does the vendor have proven assessment and implementation methodologies? • Has the vendor helped other companies with needs similar to mine?
Incremental and integrated capabilities	<ul style="list-style-type: none"> • What modules does the vendor provide that address current and anticipated needs? • Can I start with one component, and add integrated modules later? • Are the vendor's solutions easy to integrate with each other?
Extensibility	<ul style="list-style-type: none"> • How flexible is the solution? • Will I be able to easily expand capabilities to accommodate anticipated requirements? • Does the solution work on multiple platforms? • Can I customize the application to add/change screens, add data-bases, change business rules, etc.? • Will I need to hire a programmer to do these things or not?
Knowledge transfer	<ul style="list-style-type: none"> • What steps does the vendor take to provide knowledge to my internal team to help them function effectively once the implementation is complete?
Support	<ul style="list-style-type: none"> • What type of support is included? • What additional fee-based support is available?
Reporting and business intelligence capabilities	<ul style="list-style-type: none"> • What built-in reporting capabilities does the solution offer? • How easy is it to customize reports? • Will the solution give me the insights necessary to prioritize projects, ensure correct business workflows, provide cost analysis, etc.?

Section 4: IBM Tivoli Mid-Market Growing Business Solutions

IBM has more than four decades of experience in keeping customers' businesses up and running, even in very challenging situations. Across the globe, IBM provides industry-specific expertise, with 154 resiliency centers in 55 countries, and over 15,000 recovery contracts worldwide.

IBM has helped companies recover from over 750 disasters and catastrophic events, such as 9/11, Hurricane Katrina, the Indian Ocean tsunami and the Pakistani earthquake. IBM's Crisis Response Team has responded to more than 70 disasters around the world, providing communications and logistics support to aid recovery. For instance, after the 2005 Indian Ocean earthquake and tsunami, IBM's local and international teams developed systems for each of the impacted countries, with capabilities to track missing persons and fatalities, relief organization registration, logistics management, issuing of ID cards, Web support, collaboration tools, children's services, and many other relief and recovery support systems.

Many people are aware of IBM's efforts in these types of massive recovery efforts, and take it for granted that IBM provides a range of systems and services management solutions to large enterprises worldwide. However, you may be surprised to learn that IBM offers mid-market businesses a comprehensive portfolio of systems management solutions via its Tivoli portfolio for mid-market growing businesses. Over the past several years, IBM Tivoli has invested heavily to develop and acquire the technology necessary to create a comprehensive portfolio of solutions for growing midsize companies, shown on **Figure 4**.



These solutions give growing mid-market businesses an entry point to deploying proven, enterprise-strength Tivoli solutions in a modular, streamlined and cost-effective way. The line-up includes a full portfolio of storage, security and automation solutions, designed to help you to improve service levels, sustain competitive and market advantage, and

continue to grow. As important, IBM Tivoli and its solutions partners can help you assess both current and ongoing requirements, and map out a game plan to ensure that the solutions you deploy today will work with those you deploy in the future.

In addition, IBM Tivoli solutions map to the three core governance and risk management areas discussed in Section 2. Individually, these solutions provide the deep functionality, scalability, integration and customization capabilities necessary to address immediate pain points. Together, the Tivoli family provides an integrated approach that enables customers to add new modules and functionality as business and IT requirements evolve. Built on open standards, IBM Tivoli also supports the demands of a heterogeneous IT environment.

As important, IBM trains and certifies partners in areas of security, storage and automation and enables them with extensive training and support to deliver best practices and expertise to mid-market customers. With deep skills, and focused industry experience for customers of all sizes, IBM Business Partners are ready to help businesses to:

- Identify and prioritize high value business services and products.
- Establish safeguards for data protection, access and disposal.
- Inventory and manage the lifecycle of IT assets and services.
- Proactively address risks associated with security, business continuity and compliance.
- Provide visibility to ensure proactive management and to measure organizational and project performance.

Section 5: Getting Results with IBM Tivoli

BIMCOR

BIMCOR Inc. is a pension fund investment manager and a wholly-owned subsidiary of Bell Canada Enterprises (BCE) Inc. With 60 employees, and 7 full-time IT professionals, BIMCOR is small in terms of employee size. However, BIMCOR manages approximately \$13 billion in pension fund assets, making it one of the top private-sector players in Canada. For BIMCOR, timely delivery of reliable information is essential. Just a minute of downtime at the wrong moment can cost the firm millions of dollars.

BIMCOR's IT organization runs its mission-critical order and investment management solutions on multiple operating systems and databases. Roughly 6 to 7 years ago, BIMCOR determined that its existing backup and monitoring systems were no longer adequate. New regulations, such as Sarbanes-Oxley and C198, mandated much more stringent requirements for backup and archival. In addition, BIMCOR lacked tools to monitor and prevent server failures—resulting in unacceptable levels of downtime, too many fire drills for IT, and loss of productivity for the traders.

BIMCOR wanted solutions that address these problems, and support its heterogeneous server platforms in a unified manner. It was also important to BIMCOR to procure the solutions from a stable, trusted vendor. Finally, as a small company, BIMCOR needed solutions priced right for its budget.

After comparing solutions from several major IT vendors and numerous smaller contenders, BIMCOR chose IBM Tivoli Storage Manager for data backup, and IBM Tivoli Enterprise Console, NetView and ITM for monitoring. Tivoli's ability to deliver the capabilities BIMCOR needed in these areas, at a price that BIMCOR could afford, gave Tivoli an advantage over the competition. BIMCOR also factored the "great relationship" and experience it has had with IBM on the hardware front—BIMCOR runs wall-to-wall IBM System X and System P servers in its data centers.

BIMCOR's Assistant Director of IT Research personally implemented Tivoli Storage Manager in just one week. Meanwhile, BIMCOR elected to work with an IBM Business Partner, Quadra Knowledge, to deploy Tivoli monitoring solutions. Two Tivoli-certified Quadra Knowledge consultants spent about 3 months getting the three Tivoli monitoring solutions up and running, a timeframe that met BIMCOR's expectations.

Since then, BIMCOR has used internal staff to upgrade Tivoli Monitoring from version 5 to version 6.1. The upgrade took one resource about 2 months in elapsed time, and about 4 weeks in actual time, to complete.

BIMCOR is “very satisfied” with its Tivoli deployments. The firm has also been quite pleased to see how IBM has improved installation processes between 2004 and 2007. For instance, in 2004, it took about 3 weeks to create a test environment; in 2007, the time has been slashed to a ½ day. Tivoli products have also become progressively easier for BIMCOR to manage, with graphical displays and totally menu-driven instructions that significantly reduce the level of expertise that BIMCOR IT staff need to manage the systems on a day-to-day basis.

Birlasoft

Birlasoft provides IT services across the globe in both onshore and offshore models, with clients including large Fortune-listed companies across banking, finance, security and insurance segments, and in the software, manufacturing, healthcare and retail industries. As part of CK Birla Group, one of India's premier commercial and industrial houses, Birlasoft has seven delivery centers spread across India and Australia, and offices in eight countries, with U.S. headquarters in Edison, New Jersey.

The company has grown rapidly, expanding from 400 employees in 2001 to over 4,600 today. As Birlasoft grew, it realized that existing homegrown service management tools could no longer handle increasing call volumes and increased workloads across distributed centers. In addition, Birlasoft relied on manual processes to get new employees entered into the help desk system, resulting in an unacceptable lag time to get them supported.

At the same time, Birlasoft's asset management solution was also becoming a frustrating pain point for the company. With limited real-time visibility to its asset base, consolidating asset-related data across the centers grew into a massive, manual exercise. Furthermore, this process didn't give them the reporting and insight needed for strategic asset utilization and procurement planning.

From a solution assessment standpoint, Birlasoft's IT and line of business executives determined several key evaluation criteria. First, the company decided that they wanted to source both solutions from a single vendor. Second, Birlasoft wanted to be able to integrate both of these solutions with the company's financial solution. In addition, the asset management solution had integrated with auto-discovery tools on the network to reduce manual inputs, and the service desk solution had to integrate with HR systems to automatically on-board new hires into the service desk system. Third, Birlasoft wanted visibility and reporting capabilities that would enable compliance and provide input for better decision making. Finally, Birlasoft wanted the solutions to be easy to deploy and manage, and user-friendly.

After evaluating several solutions, Birlasoft selected IBM Tivoli Asset Management for IT and IBM Tivoli Service Request Manager. From Birlasoft's perspective, these solutions offered superior integration capabilities, better total cost of ownership (TCO) and faster deployment.

Since Birlasoft is also an IBM Business Partner, it opted to have its internal team train with IBM, and then deploy the solution. By all measures, implementation met and even exceeded Birlasoft's requirements. After a thorough assessment and definition of their processes, which took 6 weeks, it took Birlasoft about 2 ½ months to deploy the two solutions, which have now been up and running for about 1 ½ years.

The company estimates that it broke even on its Tivoli investment in 6 months, allowing Birlasoft to expand service to its growing employee base, but in a less labor-intensive way. The company has slashed manual efforts to support these functions by 50 to 60 percent, and achieved significant improvements in asset planning, provisioning and tracking, as well as an overall improvement in service efficiency in terms of reduced calls and faster resolution times. Birlasoft has integrated these systems with other production systems such as HR, Finance, IT Governance and Monitoring Application, creating a seamless flow of information across different functions. End users are also much happier—rating the service desk experience 4.5 out of 5.

Swedish Medical Center

Since 1910, Swedish Medical Center has served the greater Seattle area. Swedish Medical is the largest, most comprehensive, nonprofit health provider in the area, with three hospital locations and over 50 community clinics. Independent research studies have consistently cited it as the area's best hospital, with the best doctors, nurses and overall care in a variety of specialty areas.

Swedish Medical has been using IBM Tivoli Storage Manager Family since 1998, when it determined that existing backup capabilities were no longer adequate. At that time, Swedish Medical had to back up each of its 50 servers one at a time, on tape, a time-intensive and unreliable process—if resources were over capacity, the backups just didn't happen. To meet HIPPA and other requirements, the business needed to have absolute confidence that all data would be backed up, and restored as needed.

Anticipating that it would eventually have over 100 servers, Swedish Medical required a multi-threaded solution that would provide reliable backup within a specified time period, with both disk-to-disk and disk-to-tape capabilities. The company wanted a solution that would scale as they added more servers, and also one that wouldn't require a full-time, dedicated headcount. For Swedish Medical, it was important that a few people be familiar with the system, and able to manage it in addition to their other responsibilities.

After evaluating different enterprise-class storage alternatives, Swedish Medical chose the IBM Tivoli solution, which offered superior multi-threading and backup to disk and tape capabilities. With the help of an IBM business partner, Swedish Medical had the solution up and running within two months.

Over the past eight years, Tivoli Storage Manager has given Swedish “peace of mind” as data backup requirements have grown. Swedish Medical has the confidence that backups will get done, and is pleased with the built-in notifications that allow it to easily identify and fix a problem should it arise.

Running over 600 servers today, Swedish Medical's backup requirements have grown well beyond expectations—and Tivoli has scaled to handle them. Today, the Tivoli solution “automatically and flawlessly” backs up 2 ½ terabytes of data from 600 servers every night, first to disk, and then to tape. Because the solution is intuitive and manageable, five IT staff can share part-time roles in managing the solution, giving Swedish Medical the personnel redundancy it wants as well. Swedish has also successfully migrated the solution three times, to larger servers, and to a storage-attached network (SAN).

Section 6: Summary and Conclusions

As businesses grow, business performance increasingly depends on IT performance. IT must be able to prevent, manage and respond to new demands or potential threats, and at the same time, enable a proactive systems and service management approach that helps drive business growth.

Using a well thought-out approach, growing mid-market firms can create a successful approach for IT and business protection and alignment. Companies need to start with a comprehensive internal assessment to identify gaps and vulnerabilities in existing IT processes and operations. By focusing on key corporate priorities and vital business assets and operations, businesses can establish an incremental, integrated approach for effective governance and risk management.

After prioritizing solution requirements, businesses must thoroughly assess solution alternatives, evaluating them to select the one that: best maps to their unique personnel, budgetary and functionality and ease-of-deployment and use requirements; meets total cost of ownership and return-on-investment metrics; can adapt flexibly and scale to meet evolving needs. Customers should also request solid references, from customers with similar needs, for insight into real-world product experiences.

IT solution providers can help many midsize firms derive maximum value from systems and service management solutions. Trained and certified solution providers can offer mid-market companies expertise, educational and consulting services throughout the selection, implementation and ongoing operational process, helping them to avoid pitfalls and accelerating time-to-value.

Finally, companies should look beyond the immediate pain point and solution, and look for a vendor that can provide additional solutions in related areas over time. Through a strategic approach and process, growing mid-market companies can ensure they get the IT and business value and outcomes they need now, and in the future.

For more information on IBM Tivoli solutions for growing mid-market customers, visit www.ibm.com/tivoli/smb

Access Markets International (AMI) Partners, Inc., Company Profile

AMI-Partners specializes in IT, Internet, telecommunications and business services strategy, venture capital, and actionable market intelligence — focusing on global small and mid-sized business (SMB) enterprises. The AMI-Partners mission is to empower clients for success with the highest quality data, business planning and “go-to-market” solutions. AMI was founded in 1996 under the name of Access Media International (USA), Inc. by Andy Bose, formerly a group vice president at IDC. Since its inception, the firm has built a world-class management team, each with ten to fifteen years’ experience in IT, telecom, online communications or multimedia.

AMI-Partners has helped shape the go-to-market SMB strategies of more than 150 leading IT, Internet, telecommunications and business services companies over the last ten years. The firm is well known for its IT and Internet adoption-based segmentation of the SMB markets; its annual retainership services based on global SMB tracking surveys in more than 20 countries; and its proprietary database of SMBs and SMB channel partners in the Americas, Europe and Asia-Pacific. The firm invests significantly in collecting survey-based information from several thousand SMBs annually, and is considered the premier source for global SMB trends and analysis.

For more information on AMI-Partners or our global SMB surveys, please visit www.ami-partners.com, e-mail ask_ami@ami-partners.com or call 212-944-5100.