

## Frigo, Victoria (COE)

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**From:** Frigo, Victoria (COE)  
**Sent:** Wednesday, June 12, 2013 4:30 PM  
**To:** Mazzorana, Shanda (ITD)  
**Cc:** Centorino, Joseph (COE); Diaz-Greco, Gilma M. (COE)  
**Subject:** Case Study Opportunity (INQ 13-144)

Hello Shanda,

In regard to participating with a County vendor to create a case study, we caution you and the IT Department to avoid using excessive resources, including County time, for a project that may not serve a public purpose. On the other hand, a simple response to the vendor, using a limited amount of County time or County resources, is not likely to violate the County Ethics Code if the effort helps a County vendor improve its products for County users.

Sec. 2-11.1 (g) of County Ethics Code prohibits County employees from exploiting County resources to secure special privileges or exemptions for him/herself or others.

The decision to participate in the vendor's case study is a managerial one in which the exploitation prohibition must be kept in mind.

Sincerely,

**VICTORIA FRIGO, SENIOR STAFF ATTORNEY**

Direct Phone: 305 350-0601  
Main Number: 305 579-2594  
Fax: 305 579-0273



19 West Flagler St., Suite 820  
Miami, FL 33130

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**From:** Mazzorana, Shanda (ITD)  
**Sent:** Tuesday, June 11, 2013 9:07 AM  
**To:** Frigo, Victoria (COE)  
**Cc:** Hernandez, Odilia B. (ITD)  
**Subject:** FW: Case Study Opportunity with Miami Dade

Victoria, please advise if it is okay to participate in the case study with a vendor. If you are okay with it, I will forward next to Suzy Trutie from the PIO perspective.

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**From:** Hernandez, Odilia B. (ITD)  
**Sent:** Tuesday, June 11, 2013 7:52 AM  
**To:** Mazzorana, Shanda (ITD)  
**Subject:** FW: Case Study Opportunity with Miami Dade

Hi, Shanda,

Below is the response back from the vendor with more of the details. Please let me know if this is enough information to request permission for the case study.

Thanks.

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**From:** Carol Blumberg [<mailto:Carol.Blumberg@kofax.com>]  
**Sent:** Monday, June 10, 2013 6:59 PM  
**To:** Hernandez, Odilia B. (ITD)  
**Cc:** Ted Collins; Crowley, Chris (ITD); Fuentes, Mary (ITD); Carol Blumberg  
**Subject:** RE: Case Study Opportunity with Miami Dade

Hello Odilia,

Please use the following to share with your Legal Department:

Hello Miami Dade Legal Department,

Kofax would like to develop a success story about how Miami Dade has experienced value within their Organization by deploying Kofax solutions.

All final drafts must be reviewed and signed off by you...nothing would be distributed or published without your written consent to do so.

[Please find abit more information on our Case Study program and processes](#)

**Before I move into the methodology, I want to underscore two important notes regarding this program:**

1. We promise not to publish or use anything contained in the case study/interview without the written consent of the customer's Legal and Marketing/Communications approval to do so
2. Upon the customer's Legal/Marcomm approval, Kofax intends to publish the case study on its website

**Our methodology for developing case studies is the following:**

1. **The first approval needed will be from the Customers' Legal and Corp Comm teams - to approve the customer engaging with Kofax to develop a case study (*please confirm that this has been approved*)**
2. Prior to the interview with a customer, the case study manager is debriefed by the Partner (if applicable) and Account Manager on the customer's background story and good story lines to focus in on
3. The customer will select a date/time for an interview convenient to them. There can be several folks from the customer organization to participate in the interview. Generally, someone from IT who works with the Kofax solution(s) is a good idea...as well as a higher level manager overlooking the Kofax solutions and the high-level decision maker. The interview generally lasts from 40-45 minutes and is recorded only for the usage when developing the narrative story
4. Once the interview has been completed, the case study manager will develop the narrative, pass by Kofax chief writers for internal review/edits, then sent to the customer for their review and edits
5. The case study manager will apply all edits indicated by the customer...and continue this editing 'back and forth' process of the case study until the customer is 100% satisfied with the final product
6. Once the customer's Legal or Marcomm groups approve and sign off, the process will be completed

## Standard Interview Questions

I wanted to send you the types of questions asked during a case study interview...to give you an idea of what to expect in the actual interview.

Here are the standard questions we ask. Generally, the live interview will spark other questions that help personalize the case study and we always get great quotes from the customer spokesperson (reminder, they will be able to approve everything before it is published so there is zero risk we'd say something they don't want to see published).

- Please describe your company and your market.
- Which Kofax solutions are you using today?
- How long has your company been using Kofax solutions?
- Tell me about the challenges you were trying to address when you began evaluating solutions. What were the reasons that drove your organization to search for automated capture solutions?
- What were the [three] most important characteristics or capabilities of the ideal solution you were seeking?
- Did the Kofax solution replace an existing or legacy solution (home-grown or competitor)? If so, please describe.
- How did Kofax stand out from the competition? What was it about Kofax solutions/services that made you decide to purchase Kofax solutions?
- What was your evaluation process and/or trial period like? Do you use a formalized evaluation methodology and involve a review committee, or did your team simply do due diligence in reviewing all available solutions?
- What was your implementation experience like? What was your "go live" date? Was your deployment on time and on budget?
- How long after deployment was it before your team members and other staff were using the solution proficiently? How have business users / business owners responded? Have you received direct feedback from end users?
- What have the results been like since implementation? (Please quantify and be as specific as possible.)
- Which business units have deployed Kofax solutions? (For example: HR, AP, Claims, etc.)
- What is the use case for each of the business units?
- What value/benefit have you experienced using Kofax solutions? (ROI? Streamlined costs? Streamlined processes? Eliminating overhead? Saving \$\$? Saving Time? The more specific you can be with quantifiable metrics – the better.)
- Which features in the Kofax solution have been most valuable to you? For example: ability to capture electronic as well as paper documents, advance forms capture, point of origin capture, scalability, ability to customize the solution for your needs
- Were there any positive or unexpected surprises as a result of implementing your Kofax solution – a benefit you hadn't anticipated?
- Please talk specifically about how Kofax is being used in one or two areas of the business. Walk us through the process, including pre- and post-deployment.
- Do you have any unique configurations with your Kofax solutions? Are you using them in a way that might be considered new for this solution?
- What is your backend ERP?
- Do you use workflow today? If so, what is your workflow solution?
- What can you do now on a typical day that you could not do before implementing the Kofax solution? Can you give me a specific example, such as using a particular data type extracted from a document to provide information for use in a particular business process, or in reporting to executives in a way that you couldn't previously?
- How long did it take to achieve ROI, and how do you measure that?
- Are there any plans to incorporate mobile capture capabilities?
- What are the top 3 benefits your company has experienced since with automated capture since deployment?
- What are the top 3 goals for your company (with respect to automated capture) for the next 3 – 5 years?
- What go-forward initiatives is your organization thinking about? Mobile? BPM?

- If you were at a Cocktail party and someone asked you what your experience has been with Kofax solutions or your experience as a Kofax customer – how would you answer this? (This is more of a fun question to elicit comments on the value the customer sees either from the Kofax solutions or value being a Kofax customer.)

**NEXT STEP: Please coordinate your team for a date/time convenient for a 40-45 minute interview.**

**[NEWS FLASH: Kofax Among “Five Most Intriguing Companies at Finovate 2013 for Mobile Customer Onboarding”](#)**

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**From:** Hernandez, Odilia B. (ITD) [<mailto:odi@miamidade.gov>]  
**Sent:** Wednesday, June 05, 2013 8:08 AM  
**To:** Carol Blumberg  
**Cc:** Ted Collins; Crowley, Chris (ITD); Fuentes, Mary (ITD)  
**Subject:** RE: Case Study Opportunity with Miami Dade

Hi, Carol,

I have not forgotten about this. Please send a formal letter or proposal with the details of the interview that we can have our legal department review.

Thank you.

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**From:** Carol Blumberg [<mailto:Carol.Blumberg@kofax.com>]  
**Sent:** Friday, May 24, 2013 11:08 AM  
**To:** Hernandez, Odilia B. (ITD)  
**Cc:** Ted Collins; Crowley, Chris (ITD); Fuentes, Mary (ITD); Carol Blumberg  
**Subject:** RE: Case Study Opportunity with Miami Dade

Hello Odilia,

Hoping all is well!

Just checking in to see if I can help by answering any further questions you might have...happy to assist.

Thank you,  
Carol

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**From:** Hernandez, Odilia B. (ITD) [<mailto:odi@miamidade.gov>]  
**Sent:** Wednesday, May 08, 2013 1:01 PM  
**To:** Carol Blumberg  
**Cc:** Ted Collins; Crowley, Chris (ITD); Fuentes, Mary (ITD)  
**Subject:** RE: Case Study Opportunity with Miami Dade

Thanks Carol.

We'll find out from our legal and communications folks and let you know.

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**From:** Carol Blumberg [<mailto:Carol.Blumberg@kofax.com>]  
**Sent:** Tuesday, May 07, 2013 5:20 PM  
**To:** Hernandez, Odilia B. (ITD)

**Cc:** Ted Collins; Carol Blumberg  
**Subject:** Case Study Opportunity with Miami Dade  
**Importance:** High

Hello Odilia!

Ted had mentioned that you had recently approved Miami Dade participating in a case study with us! This is great news Odilia and I look forward to working with you.

I simply wish to follow up with you to give you more details of our case study program and processes.

**Before I move into the methodology, I want to underscore two important notes regarding this program:**

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Odilia, please let me know if you have additional questions – happy to assist!

**NEXT STEP: Please coordinate your team for a date/time convenient for a 40-45 minute interview.**

I look forward to hearing back from you,

Kind regards,

Carol

**Carol Blumberg**  
Customer Programs Manager  
**Kofax, Inc.**

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***NEWS FLASH: Kofax a Leader in the Forrester Wave™ - Smart Process Applications***

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