

Welcome to this Presentation of the Control System Integrators Association (CSIA)

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The History of CSIA and Major Milestones

1990 - Charlie Bergman started Technical Marketing, a company that gathered statistics on system integrator companies. That collection of companies became the nucleus of CSIA. An executive council formed and selected the CSIA name, developed by-laws, objectives and membership requirements.

1993 - First Executive Conference

1994 - First Annual Membership meeting

1997 – The Best Practices and Benchmarks Manual was written by integrator members

2000 – CSIA Certified member program begins

2003 – CSIA Insurance program begins

Today!

- **~215 Associate Members (non-Certified)**
- **~85 Certified Members**
- **~60 Partner Members**
Vendors / Suppliers of automation equipment and software

What is the Mission of CSIA?

- To bring successful control system integration to the marketplace
- To improve System Integrator business practices and performance
- To provide an industry-specific forum for members to network, train, discuss common issues and share best practices
- To create recognition and demand among end-users for CSIA Certified members
- To brand “CSIA Certified” in the marketplace so that certification becomes a requirement to do business
- To increase our membership globally

CSIA Value Proposition

CSIA is committed to the development of the business capabilities of control system integration companies globally and their implementation of best practices in order to provide a low risk channel for the application of automation technology to their industrial clients.

Value of Membership for System Integrator Members

- 1. Annual Executive Conference and Meeting**
- 2. Best Practices Manual**
- 3. CSIA Certification**
- 4. Web 2.0 website, including a private community**
- 5. “Find an Integrator” feature for end-users**
- 6. Networking with Peers (expanded business opportunities!)**

Value of Membership for System Integrator Members

- 7. Standard Business Documents (Terms and Conditions, Project Risk Assessments)**
- 8. Industry-Specific Business Insurance**
- 9. Industry-Specific Statistics**
- 10. Sales Training**
- 11. Peer Groups**
- 12. Training Webinars**
- 13. Member Surveys**

2011 Annual CSIA Conference: Education & Networking

- **Energy Management: A New Business Frontier for SIs**
- **Selling a CSI business: From a Seller's Perspective**
- **Proactively Driving ROI into your Project Pursuits**
- **Achieving Business Goals with SharePoint**
- **Reduced Service Cost & Improved Support w/ Remote Cellular Access**
- **Planning for Recovery and Growth: Strategic Planning**
- **CSIA Certification: Costs, Challenges, Benefits**
- **The Legal Impact of Automation Standards**
- **Disaster! Does This Describe your Insurance Program?**
- **How to Spell QUA-LI-TY**
- **Migration Planning: Opportunities to Replace Client's Aging Equipment**
- **WOW! Create Proposals that Set You Apart**
- **Panel Discussion with Two End-Users: What Do They Expect of CSIs**
- **Marketing and Selling Presentations (3)**

Best Practices Manual & Audit for Certification: Sections 1 to 4

1. General Management

- **Organizational Structure, Computer Systems Management, Risk Management**

2. Human Resources Management

- **Recruitment, Personnel Performance Evaluations, Training, Compensation**

3. Marketing, Business Development, and Sales

- **Marketing Plan, Sales Strategy**

4. Financial Management

- **Measures of Performance, Financial Planning, Billing Procedures, Tax Policy**

Best Practices Manual & Audit for Certification: Sections 5 to 8

5. Project Management

- **Contract Management, Risk Management, Scope & Change Management**

6. System Development Lifecycle

- **Internal Kickoff, Design, FAT, Commissioning, SAT**

7. Supporting Activities

- **Standards and Templates, Configuration Management (internal and projects), Reuse Library Management**

8. Quality Assurance Management

- **Project Quality Assurance, Continuous Improvement, Client Satisfaction Surveys**

The Basis and Process of the Audit to Become CSIA Certified

Understanding the audit process is key to understanding its value!

- The Best Practices Manual is the basis for the audit questions
- The manual has about 300 criteria, each being a question followed by guidelines to accomplish a positive response to the question
- 76 of the 300 criteria are considered most critical for the operation of a system integration company so they make up the audit
- The integrator prepares for the audit by implementing the guidelines in the Best Practices Manual for the 76 criteria in the audit
- The integrator contracts with a CSIA auditor to perform the audit. The auditor requires evidence of compliance with Best Practice guidelines.
- With a passing score, the integrator member is now *CSIA Certified*

The Value of being a CSIA Certified Integrator Member

- **Improved business operations which results in:**
 - **peace-of-mind for top managers and owners**
 - **improved sales**
 - **sustainable growth**
 - **the probability of increased profitability**
 - **attracts and retains good employees**
 - **Improves client relationships**
- **Business Development advantage! CSIA Certification is a differentiator.**

(continued)

The Value of being a CSIA Certified Integrator Member

- **More owners and end-users are beginning to require CSIA Certification to bid projects**
- **The opportunity to be highlighted on Partner member websites as CSIA Certified**
- **The opportunity to be in the top-tier of some Partner member Service Provider programs**

“The CSIA was instrumental in growing and maturing our organization, and we are very grateful for all that it has to offer – keep up the good work.”

Steve Conquergood, Advanced Measurements Inc. in Calgary, AB

The Value of CSIA Certified Members to End-Users (clients)

- **Selecting a system Integrator to work with is made easier when CSIA Certified integrators are amongst the choices. Analogies:**
 - **When selecting between a licensed electrical contractor and one that is not licensed, which would you select?**
 - **When selecting between a UL Listed device versus one that's not UL Listed, which would you use?**
 - **So if you're an end-user selecting an integrator, one is CSIA Certified and one is not, which would you choose?**
- **CSIA Certification indicates that an integrator complies with CSIA's business Best Practices**
- **Working with a CSIA Certified member reduces the risk of project failure and increases the probability of successful projects.**

The Value of CSIA Certified Members to Automation Vendors

At the end of the day, both Integrator and Partner Members want nothing more than for their customers to be satisfied!

- **CSIA Certification focuses on business practices, so it compliments the technical requirements of Partner's service provider programs**
- **CSIA Certification enables Partners to easily identify the top system integrators and thereby align with them**
- **CSIA Certification is the foundation for long-term integrator viability, so Partners are reasonably sure they'll be around for a long time**
- **CSIA Certified integrators increase the probability of the Partner's technology being represented properly**
- **CSIA Certified integrators reduce the risk of project failure**



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