



CHARTER  
2024

Delivering Digital Transformation  
People | Process | Technology



## Our Vision

We deliver consultative, subject matter and solutions expertise to help build and execute a roadmap for your successful Digital Transformation Journey.

## Our Mission

At Charter, we are driven to inspire and help our customers achieve their goals and aspirations. Our Purpose is to build better organizations through the alignment of people, process and technologies driving more effective communications, increasing operational performance and modernizing their business.

## Simplifying the business of IT

Dedicated to customer success, we are a team of professionals focused on helping our customers communicate better, perform faster and maintain business resiliency. As today's business world changes quickly, we are committed to ensuring that our customers are future-ready.

## Charter Founded

Founded by Paul Chandler and Stuart Jensen with the mission of putting the "Capital V" back in Value added reseller.

## Charter Services Launched

Started with a focus on delivering solutions, on-time and on-budget as a temporary extension of their team, Charter has grown into a highly respected, innovative team that delivers a Best in Industry Full Services stack.

## BA Launched

Customer obsessed, Success-driven, and dedicated to ensuring our customers are future-ready through consultative services, innovation, and strategic investments that deliver successful business outcomes. \$100m milestone achieved.

## Additional Practices Added

Charter added a new Microsoft services practice to the fold. We also compounded our Advisory & Consulting services portfolio with combined GRC and Cybersecurity Assessment services.

1997

2003

2005

2016

2021

2022

2023

## Service Provider Division Launched

NWTEL was the first Service Provider customer of Charters'. Charter's SP team provided the procurement, logistics, and Business Architectural Services.

## Acquired Boardwalk

The coming together of 2 like-minded companies has propelled Charter into a leading organization committed to the success of our customers by simplifying the business of IT.

## New Practices Launched

2022 has seen the launch of Charter's Energy, Resources & Industrials (ER&I); IT Staff Augmentation; Governance, Risk & Compliance (GRC); and Application Services (SwiftHarbour) practices.



Founded in 1997, with an obsession for delivering value to help drive your success! At Charter, we invest in the expertise and the experience to help drive your goals allowing you to invest in the critical, strategic areas of your business. Our innovative services and solutions have all been developed with the goal of driving your business **FORWARD TOGETHER.**

## CHARTER at a glance

- Highly skilled, Customer-focused Team; 270+ prestigious technical and Professional certifications across 15 disciplines
- Global Logistics, Agile Project Delivery, White Glove Support Services
- Managed & Co-Managed Network, Security, Cloud and Voice
- 7 Offices across Canada
- 50 years of ER&I industry experience

## Customer Driven

Our customers business world is changing fast, and Charter is committed to ensuring our customers are future ready

**Obsessed** with Customer Success

**Focused** on delivering customer desired Business Outcomes

**Invested** to provide the best Subject Matter Expertise

**Driven** to be an extension our Customers team



## Locations

Across the country with warehousing and staging facilities in Ontario, Alberta, and British Columbia





Founder & CEO  
Paul Chandler



President  
Kelly Michell



Chief Financial Officer  
Sherrey McGowan



Chief Operations Officer  
Kegan Adams

# CHARTER'S Leadership Team



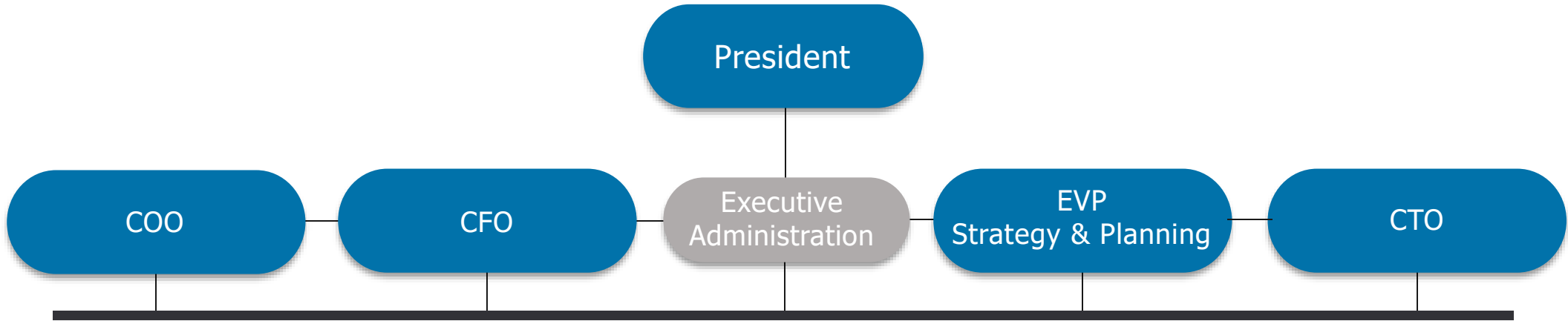
Chief Technology Officer  
Ronnie Scott



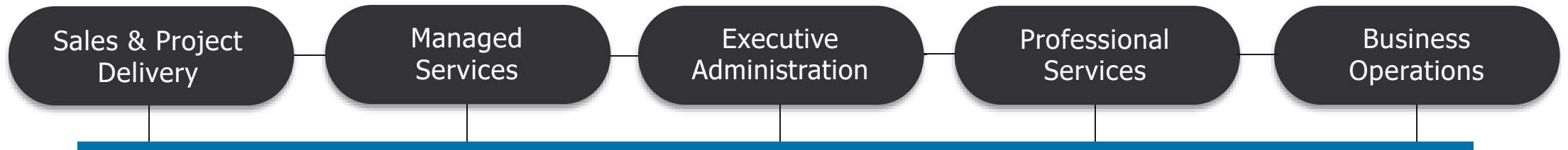
Chief Revenue Officer  
Ryan Abel



EVP, Strategy & Innovation  
Steve Kinsey



Drives strategy and direction and facilitates the corporate, financial and operational business aspects



Our management team runs our business operationally day to day





People



Process



Technology





Agility



Experience



Scalability



Resiliency

# Transformation Objectives



Business  
Growth



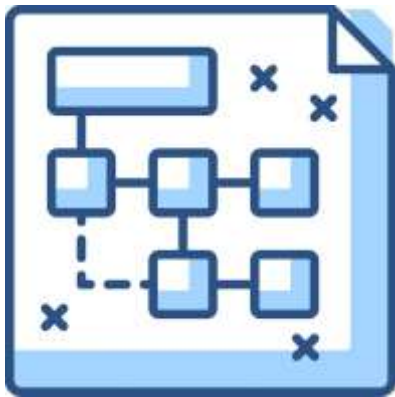
Revenue  
Growth



Stakeholders



Customer  
Experience



Process  
Acceleration



Security



Governance



ESG



*Proudly Supporting and Driving Digital Transformation for many of Canada's leading Companies*



Service Providers



Healthcare



Private & Public Sector



Education



Energy, Resources, & Industrials

# Our Customers





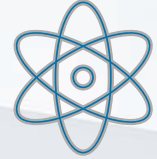
Service  
Provider



Healthcare



Public & Private  
Sector



ER&I



Education



Professional  
Services



Managed  
Services



Business  
Architecture

Eight Major Lines of Business

## Service Delivery



- CMS - Highly customized Managed Services
- Clarity - Business Lifecycle Management
- CharterCare - NOC / Hybrid NOC services
- Projects as a Service
- Implementation Services / PM Services / Training

## Professional Services



- Business Architecture
- Staff Augmentation
- Application Development
- Virtual Experts
- Governance, Risk & Compliance

# Four Service Pillars

## Financial Services



- Capex and Opex Solutions
- Procurement as a Service
- Hybrid Lease Services
- Network as a Subscription

## Business Operations



Global Logistics services provide our customers with Global presence, delivery, Service Management and 24 hr. support worldwide.

With your business in mind, Charters' 4 pillars have been developed to deliver the skills, experience and services you need but don't need to own. Charter is an extension of your team driving your business outcomes and success.



Procurement As  
A Service



Hybrid Lease  
Services



Network As  
A Subscription



Alternate Financial  
Solutions



*Purpose-built Business Operations to Facilitate your Requirements with Communication, Visibility, and Expertise*

“Simplifying the way you Procure, Consume, and Manage the lifecycle of your technology!”



Procurement  
& Logistics

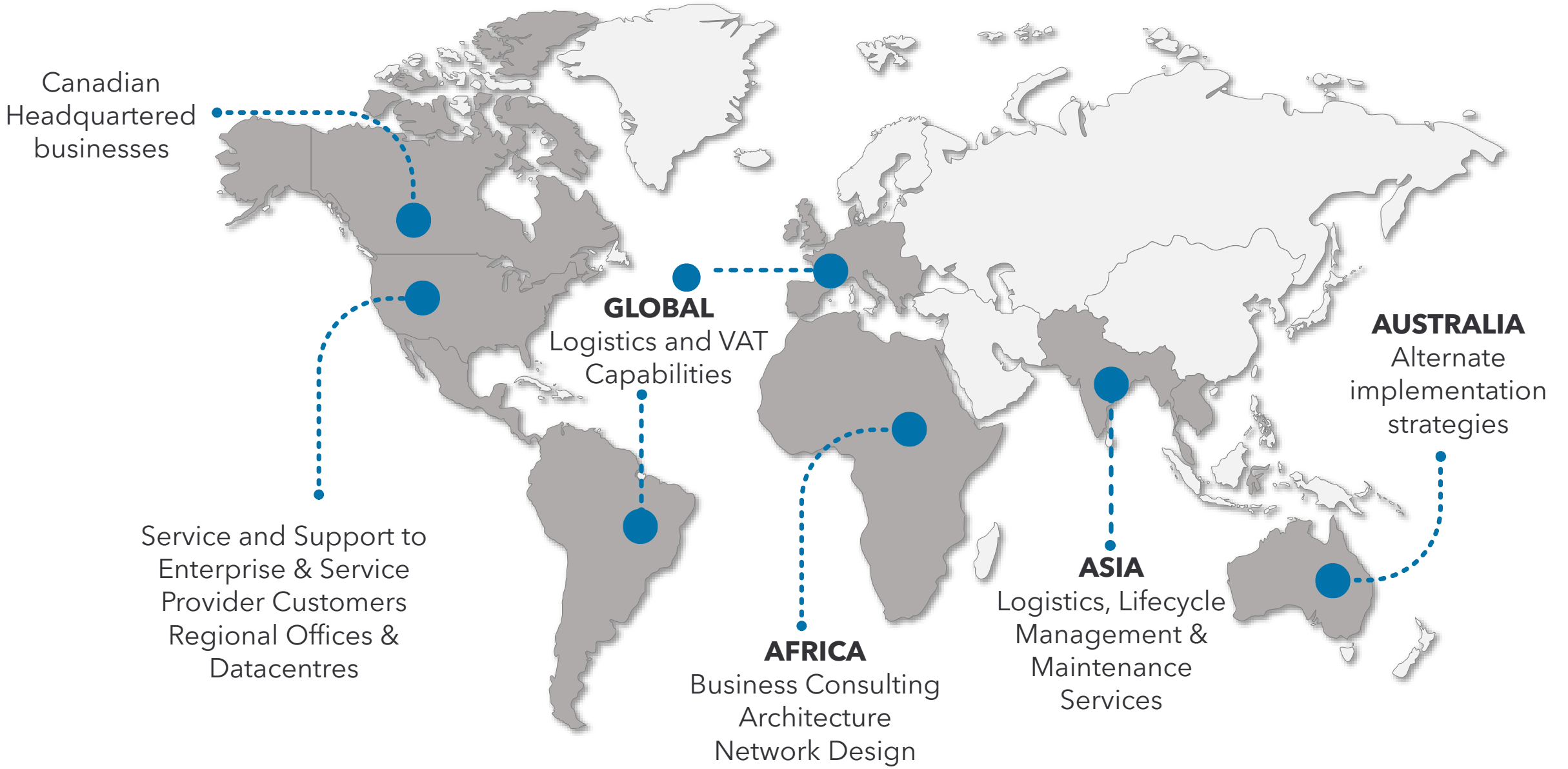


Clarity



Partners

What We Provide



# Our Service Footprint



Cloud



Collaboration



Security



Infrastructure





STAFF AUGMENTATION



APPLICATION DEVELOPMENT



CONSULTING SERVICES

Professional Services



PMO-Led Solution  
Delivery



Technical Assistance  
(Onsite & Remote)



Assessments  
& Design



Knowledge Transfer  
& Adoption

Project Services



# Obsessed with your success

## Project Management

Our PMO manages your project like it's our own by defining your success plan, stakeholder analysis, customized communication and visibility through the lifecycle of your project



✓ Scalable

## Design & Implement

Our agile delivery model enables your projects transparency and scaling through innovation and industry best practices, with the flexibility of delivering your solution based on your vision.



✓ Flexible

## Warranty and Support

Our Project Delivery team provides Day One support and a Service Warranty with option of adding training and continuous support for every project guaranteeing the success of your Business Outcomes.



✓ Easy





Project-specific knowledge transfer and support, focused on an easy transition to on-going production support

### Knowledge Transfer



Formal technical documentation for the project and post-project production environment will ensure updated knowledgebase for support.

### Backup Support



Backup support for your team while they are learning to support an updated environment and eventually becoming Subject Matter Experts.



Customized and specific technology focused, we help ensure your team has the skills and knowledge to take full advantage of your new network



## Education

Designed around specific technologies and focused on building deep knowledge providing a track for your staff to become Subject Matter Experts.



## Training

Custom training packages are developed to deliver your team the skills to manage and operate their new network.



Flex Arrangements  
To Augment Manufacturer  
Warranty On-Demand /  
Blocks / Annual



24/7; 365 Days;  
Call Answer;  
English Or French



Maintenance Plus







Cloud-Managed  
Networks



Cloud-Managed  
Security



Configuration  
Review



Managed  
Services

# Cloud-Managed Networks & Security



Advisory and Consulting





Application  
Development  
& Services



Business  
Architecture



Cloud &  
Applications



Cloud Managed  
Networks &  
Security



Governance,  
Risk, &  
Compliance



Security



Staff  
Augmentation



Virtual Experts





Business Clarity



Adoption Clarity



Lifecycle Clarity



Manage Clarity



Elegant



Effectiveness



Adoption



Business

### Manage Clarity

### Lifecycle Clarity

### Adoption Clarity

### Business Clarity

Or let Charter do it for you. Don't worry about deployment, refresh cycle, maintenance, or outages. With one simple subscription cost, we can take care of it all, so you don't have to. This will free you to focus on growing your business.

Reviewing your assets and determining their lifecycle had never been easier. We'll work with your team to consolidate and manage your contracts, present realistic renewal options, and plan for refresh as products are marked end of life.

We'll help you plan, deploy, use, train, and ensure your company is getting the most out of your investments in a way that ensures success and growth

From success planning to project planning, business strategy, to order management & logistics, we make doing business with Charter easy.

# Get Clear Insights and Optimize your IT Assets

## Benefits:

- Drive operational efficiency
- Mitigate install base and lifecycle risks
- Achieve positive ROI
- Align IT with business outcomes
- Free up time and budget to focus on business drivers
- Plan and budget for future growth



## Services Offered:

- **PLAN** wisely by tracking expenses, optimizing operations, and investing for the future.
- **OPERATE** efficiently with effective inventory management and simplified processes.
- **MITIGATE** risks by identifying coverage gaps, tracking changes, and updating strategies.



**COMPLETE LIFECYCLE  
MANAGEMENT OF ASSETS,  
RISK, & BUDGET**



**CUSTOM SOLUTIONS  
& FOCUSED CLOUD  
STRATEGY**



**CLEAR ROI  
ON TECHNOLOGY  
INVESTMENTS**



**CHARTER BA4IT  
FRAMEWORK  
FOR STRATEGIC IT**



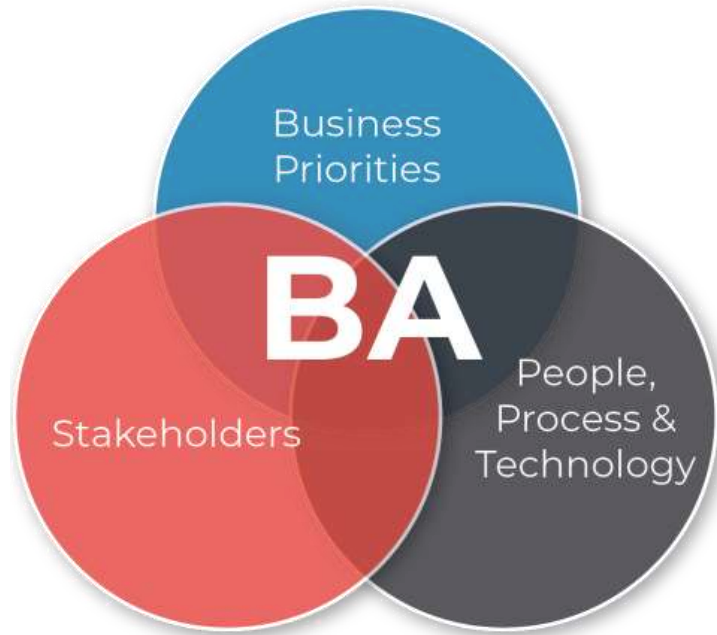


Vision & Strategy



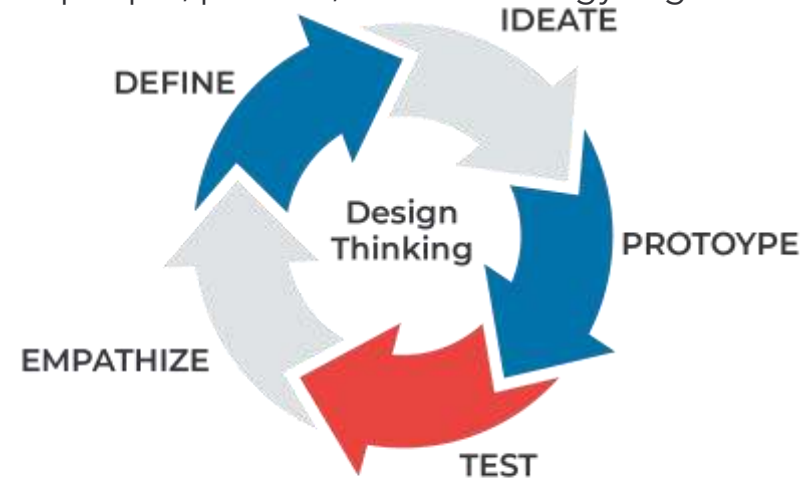
Digital Transformation





### The Charter BA4IT process:

- Stakeholder analysis & interviews
- Business vision definition and review
- Define the business priorities, risks, outcomes, and KPIs
- Design Thinking workshop to innovate and create new business capabilities
- Create a roadmap of people, process, and technology aligned to your business priorities



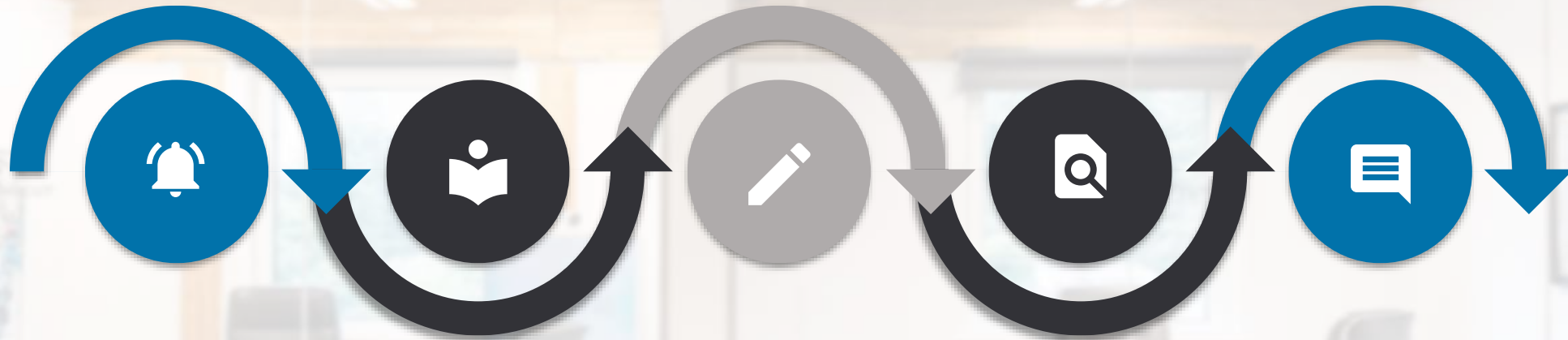
### The Deliverables:

- Executive summary of CAPEX, OPEX investment, business outcomes, and the time to value
- Digital Transformation Roadmap Plan



We define business priorities, outcomes, KPIs, and capabilities supporting the customer's business lifecycle.

We provide customers with a strategic plan to align with their business priorities.



We enable digital transformation for our customers.

We transform IT into a strategic business partnering.

We answer the **WHY**, **HOW**, and **WHAT** for our customer's business.

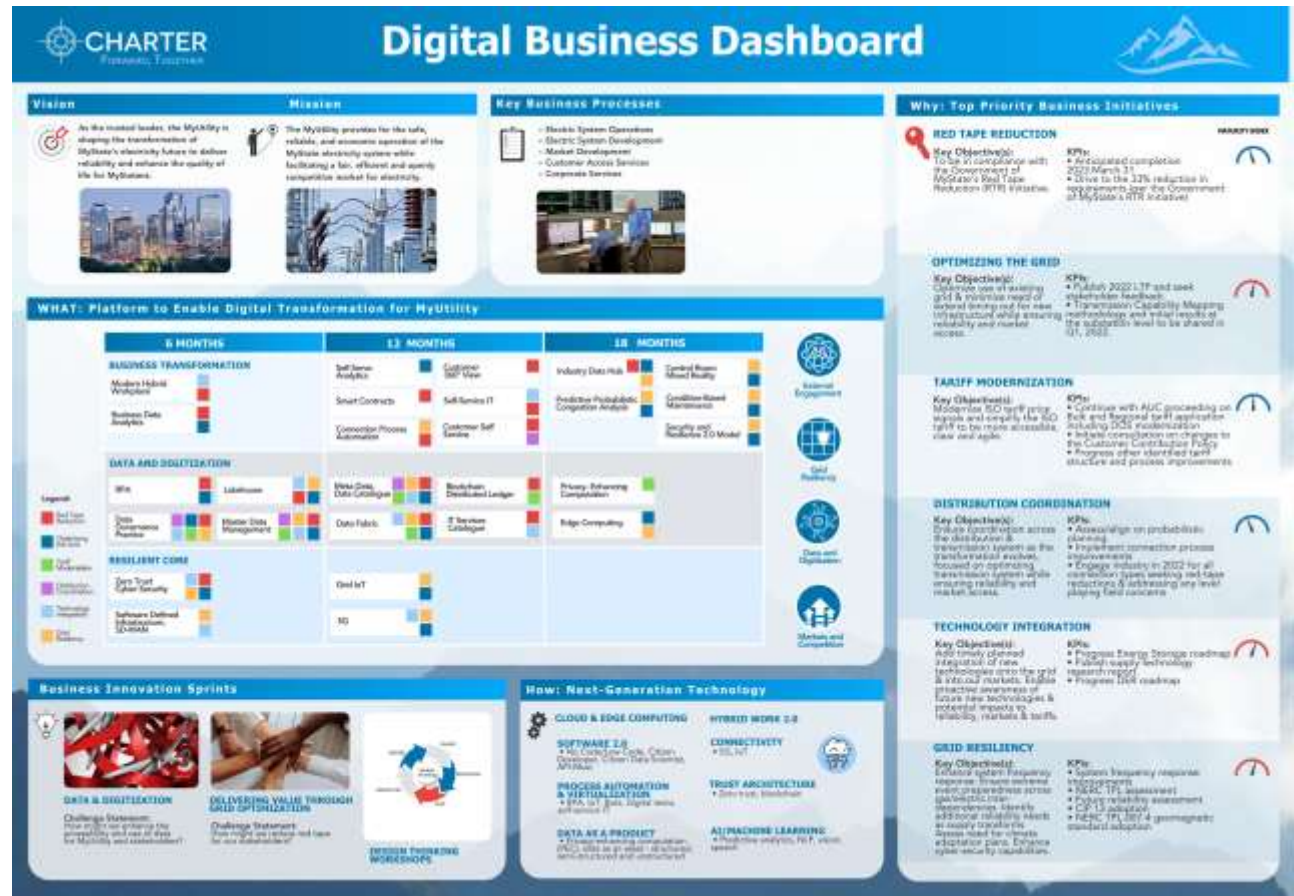
# Driving Business & IT Innovation

## Benefits:

- Business risk mitigation
- Shareholder alignment
- Organizational/ process innovation
- Enhanced ROI
- Business Architecture Roadmap
- Digital Transformation Storyboard

## Services Offered:

- Stakeholder & business analysis
- Charter's B4IT process
- IT guidance & implementation
- Design thinking workshops
- Enhanced business reporting & analysis
- Execution planning





Skilled IT  
Professionals



Reduced Admin  
Overhead



Flexible Work  
Model



Resource  
Management



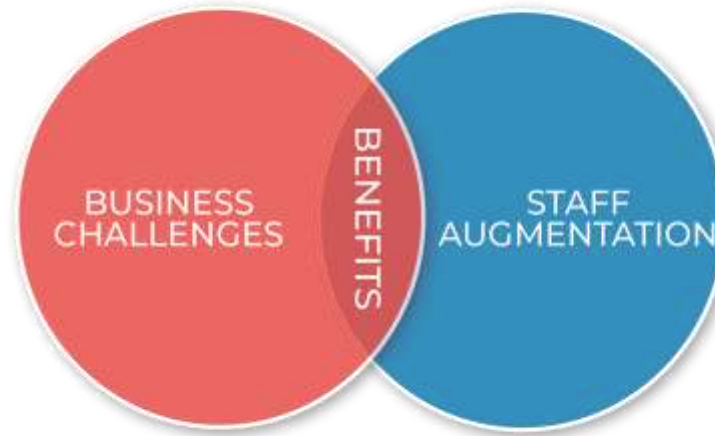
# Working Together to Optimize your IT Teams

## Benefits:

- Quick Turnaround - Scope to Deployment
- Reduce Admin Overhead
- Variable Length of Contracts
- Add Resources as Needed
- Coverage for Leave of Absence
- Key Business Driver Solutioning
- Standardization of Support Nationally

## Business Challenges:

- Technical Skills Gap
- Seasonal Industry Spikes
- Business Growth
- Long Hiring Cycles
- IT Initiatives/Projects Timelines



## Services Offered:

- Skilled IT Professionals
- Dedicated Resources
- Work Model - Hybrid, Onsite, Remote
- Operational and Project Support
- Resource Management
- vExpert and vCIO Services
- National and Local Assignments



**SKILLED TECHNICAL  
PROFESSIONALS**



**REDUCE ADMIN  
OVERHEAD**



**ENHANCED RESOURCE  
MANAGEMENT**



C-Level Advisory  
Services



Short-Term  
Engagements



Subject Matter  
Experts



IT Governance  
Assessments



IT Risk  
Assurance



Data Governance  
Advisory Services



Compliance  
Reviews



Helping our Customers Increase their Capabilities, Performance and Resiliency



**Benefits:**

- Reduce costs and optimize IT investments
- Improve transparency & decision-making
- Optimize value-added activities
- Manage immediate & long-term risks
- Address regulatory & compliance needs
- Improve alignment of objectives
- Accelerate digital transformation
- Achieve your possible

**Services Offered:**

- Governance program optimization
- Design and testing of internal controls
- Maturity Reviews
- Risk assessments
- Project risk advisory services
- Compliance review
- Audit assistance and remediation
- Third-party risk management program



**GOALS, POLICIES &  
PROCEDURES,  
CONTROLS**



**RISK IDENTIFICATION,  
ASSESSMENT  
MONITORING**



**AUDITS  
REPORTING**



Cloud Adoption



Modern Workplace



Backup/ DR



Cloud Security

# Custom Software Solutions to Address Unique Challenges



## Infrastructure Solutions

Software-assisted device migration and infrastructure optimization



## AI/ML Solutions

Private & secured Generative AI/ML solutions to exploit proprietary data



## Digital Twins & Decision Making

Turn institutional knowledge into IP via Digital Twins & decision assistance platform



## Data Solutions

Data governance & strategy, big data & analytics, data warehouse consolidation



## Hybrid Development

Bridge gaps between no/low-code & pro-code; extend MS Power App ecosystem with custom Apps



## Workflow Modernization & Optimization

Automate & optimize processes & workflows with cost-efficient custom applications



# Helping your Business Achieve Digital Transformation

## Benefits:

- Modernized & optimized processes
- 360-degree view of your business
- Attractive applications that work
- Worry free technology
- Advice you can trust
- New market opportunities

## Services Offered:

- Custom software development
- Data administration and analytics
- UX research and design
- Long-term support
- System assessment
- Applications as a service



**AUTOMATION**



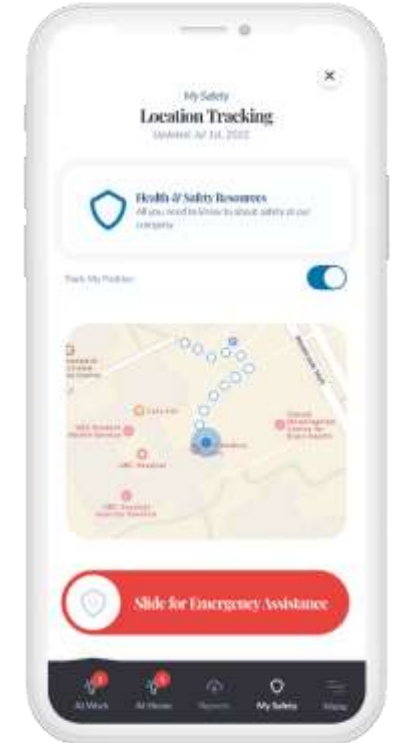
**DATA ANALYTICS**



**APPLICATION  
DEVELOPMENT**

## Digital Challenges:

- Better Business through Technology
- Collecting and Analyzing Data
- Business Intelligence
- Increasing Productivity
- Updating Software Systems
- Discovering New Markets





Security Maturity  
Reviews



Zero Trust  
Architecture



Soc As  
A Service



IT/OT Security  
Controls

# Building Secure Solutions on Resilient Frameworks

## Benefits:

- Strong Operational Foundation
- Deep Environment Insights
- 3rd Party Security Validation
- Improved Security Posture
- Monitoring and Reporting
- Industry Leading Technology

## Services Offered:

- Assessment Services
- Penetration Testing
- Architecture and Design Services
- Implementation Services
- Managed Services
- Response Coordination



ASSESSMENTS



ADVICE



ARCHITECTURE



IMPLEMENTATION



*Proudly Partnering with the Leaders of IT*

STRATEGIC  
PARTNERS

TECHNOLOGY  
PARTNERS

DISTRIBUTION  
PARTNERS



World Class Partnering





## Gold Integrator Partner

Lifecycle Management Certified  
13 Specializations  
Strategic Partner Since 2002



## Portfolio Elite Partner

Service Delivery Certified  
8 Specializations  
Strategic Partner Since 2004

**Industry Leading Technologies - Deep Knowledge – Joint Innovation - Customer Advocacy**



## Double Black Diamond Partner

PartnerWorks Certified  
49 Specializations  
Strategic Partner Since 1997



## Solutions Partner

Infrastructure Azure Certified  
76 Specializations  
Strategic Partner Since 2023

*Proudly Partnering with many of the Best*



Some of our Technology Partners





*Our long-standing Relationships help Facilitate better Visibility throughout the Order Cycle for our Customers and Provide Access to additional Resourcing, Expertise, Lab, and Inventory Facilities.*



Flexible, Scalable Distribution Partner Models





# Our Customers

Proudly partnering with some of the best Canadian Companies



Service Providers



Health Care



Education



Enterprise &  
Industrial



Public Service



CharterCare

IN THE NORTH



# Our Customers

Proudly partnering with some of the best Canadian Companies



Service Providers



Health Care



Education



Enterprise &  
Industrial



Public Service



CharterCare



## SERVICE PROVIDERS & UTILITIES



# Our Customers

Proudly partnering with some of the best Canadian Companies



Service Providers



Health Care



Education



Enterprise &  
Industrial



Public Service



CharterCare



## EDUCATION

BCNET



YORK U



Royal Roads  
UNIVERSITY



Calgary Board  
of Education



# Our Customers

Proudly partnering with some of the best Canadian Companies



Service Providers



Health Care



Education



Enterprise &  
Industrial



Public Service



CharterCare

# PUBLIC SECTOR



# Our Customers

Proudly partnering with some of the best Canadian Companies



Service Providers



Health Care



Education



Enterprise & Industrial



Public Service



CharterCare





## ENTERPRISE & SMB

RAYMOND JAMES®



PINWOOD



ECKLER

# Our Customers

Proudly partnering with some of the best Canadian Companies



Service Providers



Health Care



Education



Enterprise &  
Industrial



Public Service



CharterCare



# CHARTERCARE



# Our Customers

Proudly partnering with some of the best Canadian Companies



Service Providers



Health Care



Education



Enterprise &  
Industrial



Public Service



CharterCare



For more information on Charter,  
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Thank You