

National Instruments Mandating CSIA Certification for Top Partners

October 8, 2019

Jack Barber, Exotek

- Be the Leader in Software-Defined Automated Test and Automated Measurement Systems
- “Partners (Integrators) are an essential element of our ecosystem to help our customers create solutions.”
 - Alex Davern, Chief Executive Officer

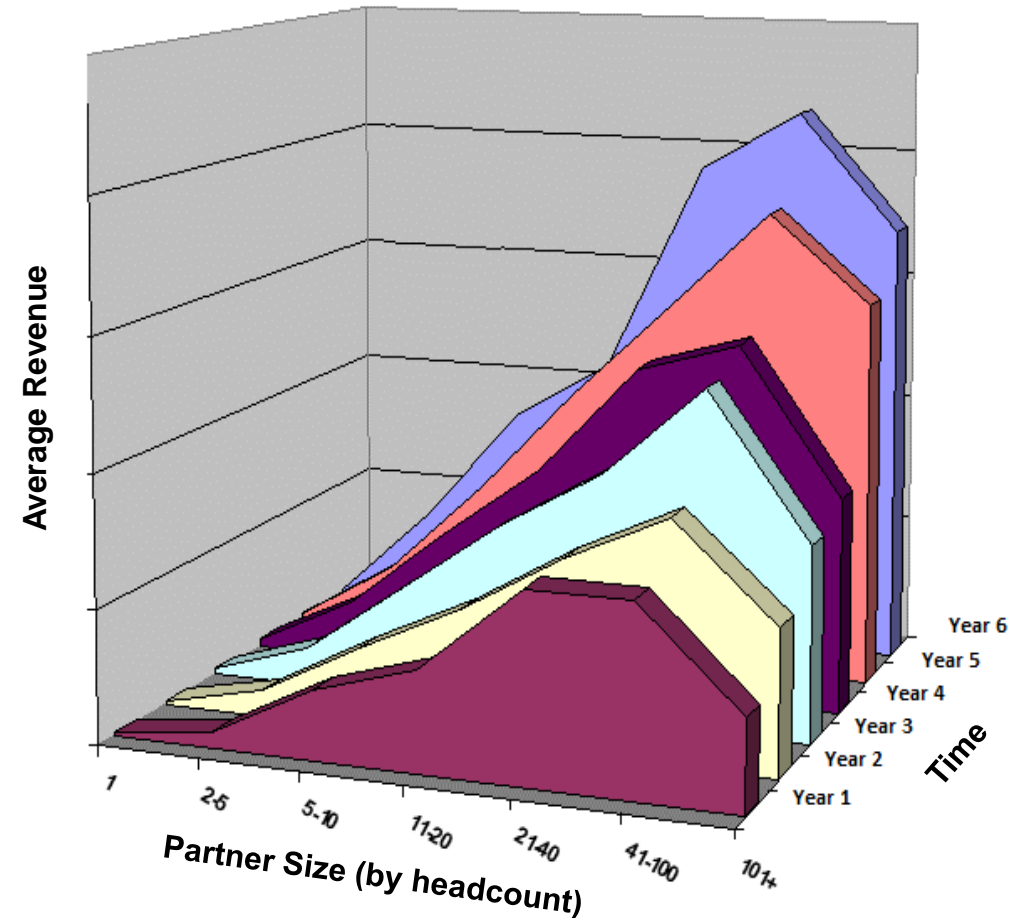


- NI expanding footprint
 - From test into automation
 - Introducing first 'industrial' products
- Joined CSIA
 - NI saw need for 'industrial' integrators
 - Conversion is hard
- Association benefits
 - By SIs for SIs
 - Best practices

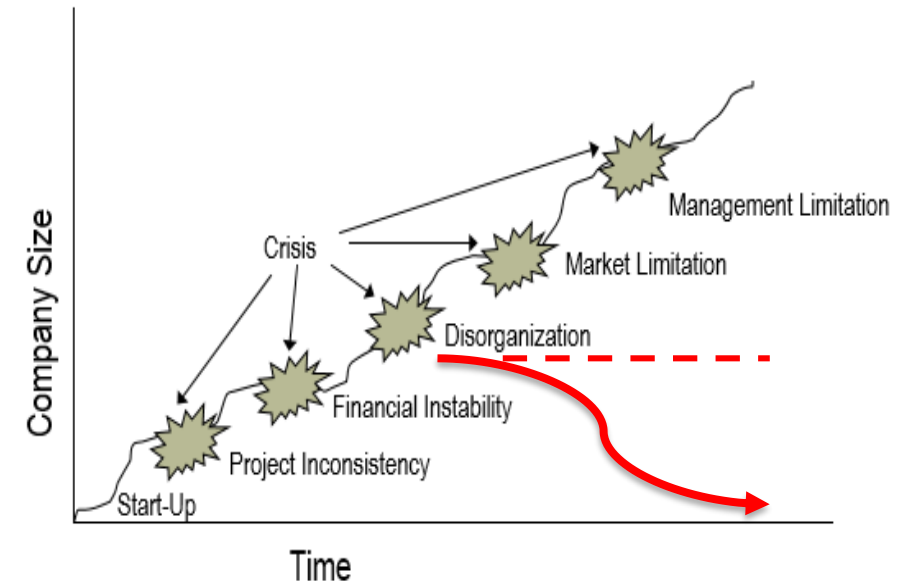
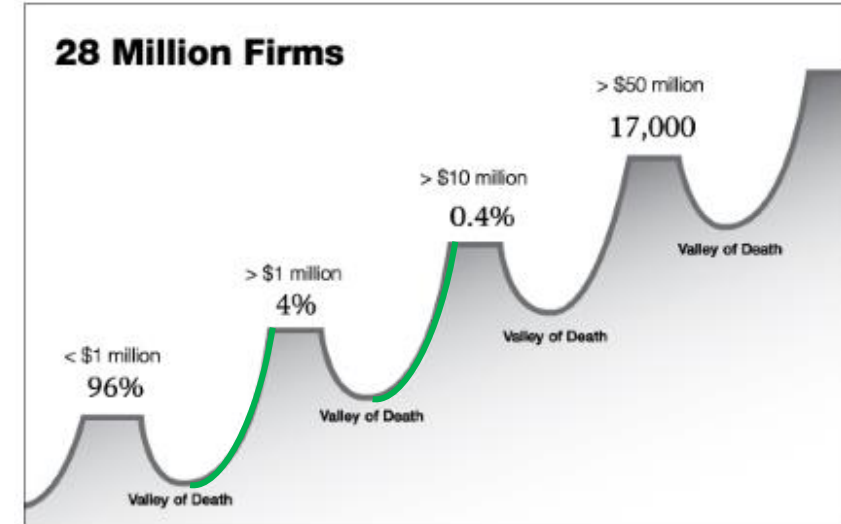


Doubling the SIs Business (2000s)

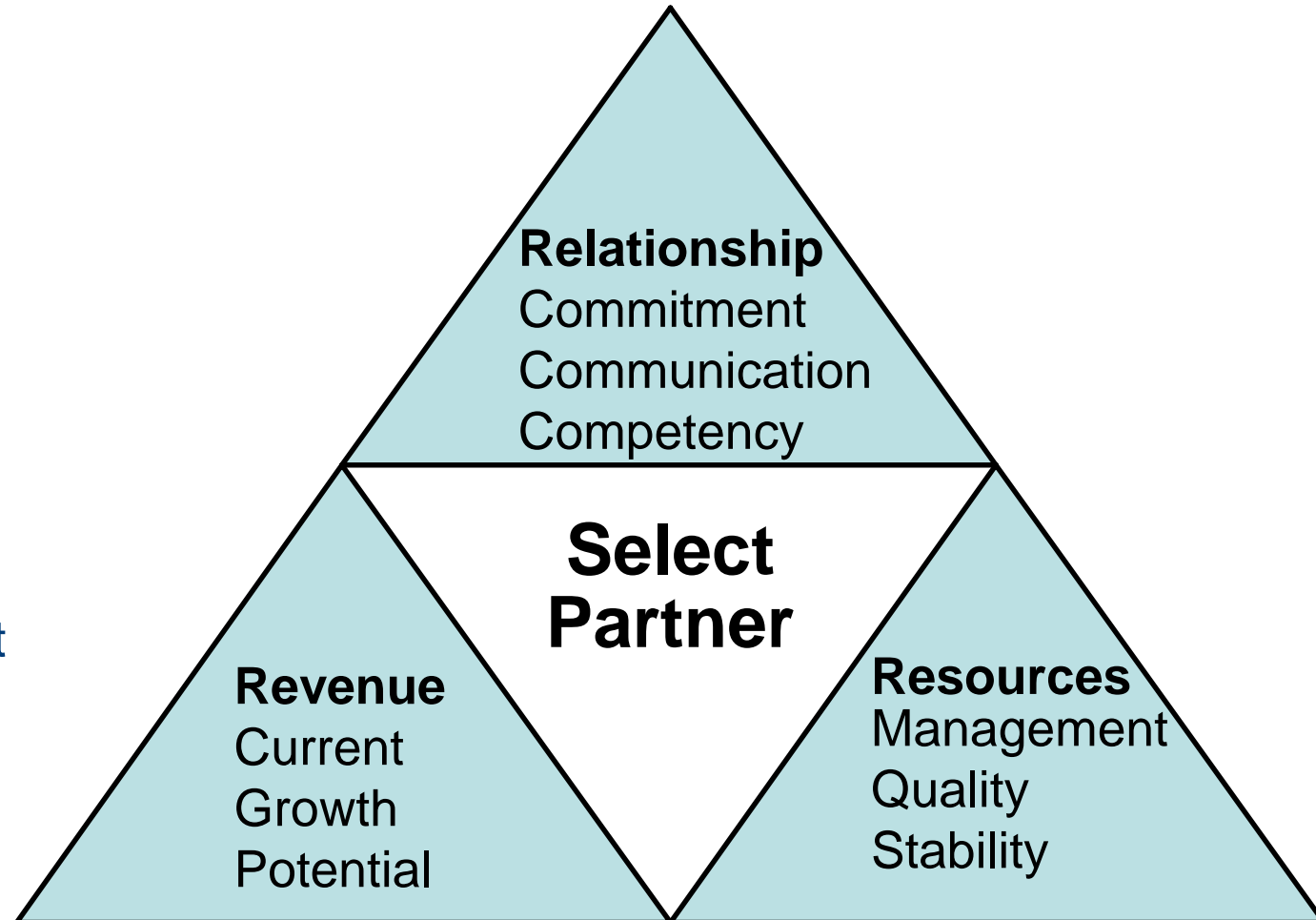
- System business growth
 - Double means quadruple
 - “Grow, dammit, grow”
- VAR Revenue
 - Company size matters
 - Growth over time
- Scaling company size requires:
 - More than technical expertise
 - Business acumen



- Industry Studies
 - Scaling Up (Verne Harnish)
 - Evolution and Revolution as Organizations Grow (Larry Greiner)
- System integrators challenges
 - Project inconsistency
 - Financial instability
 - Lack of organizational structure
 - Market limitations
 - Executive management limitations



- Introducing the idea
 - The 3 R's
 - How are we selecting?
- Vetting the process
 - Strongest integrator
 - Medium integrator
- Foisting the process
 - Give existing partners time
 - Join CSIA and prepare for Audit
- Participating in the process
 - Split the costs
 - Attend the audits
 - Share in the results

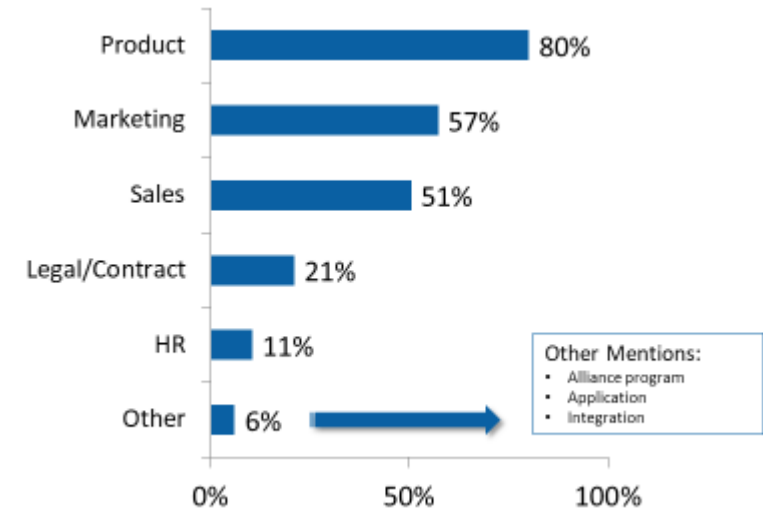


- Initial Evaluation (purely exploratory)
 - Sponsor and Alliance Partner complete the Select Partner Evaluation Form
 - Statistical comparison with our existing Select partners
- On-site Assessment (preliminary)
 - SPSC member visits candidate based on our experience with other Select partners
 - Qualitative, in-depth questions to provide specific recommendations
- Formal Audit
 - Developed by CSIA (www.controlsyst.org)
 - Partner joins the association, reviews BP&B, and prepares for audit (3-6 months)
 - NI splits audit fee, sends a representative to observe, and share results of the audit
- Annual Review/Planning
 - Statistics compiled for evaluation of current and future Selects
 - Partner and sponsor team meet to set objectives, plans,

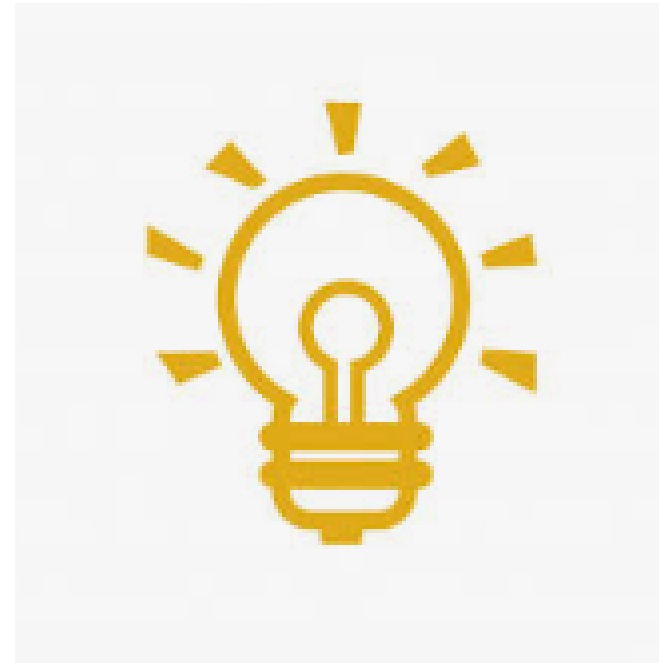
- Preferred Sales and Marketing
 - Discounts, opportunities,
 - Web site, trade shows, articles,
- Preferred Support and Access
 - Premier support, software lease, demo discounts,
 - Sales conferences, summits,
- Intangibles
 - Credibility with clients, NI,
 - Morale with employees, recruits,

- Integrators inevitably struggle
 - Get into trouble and project failure
 - Inadequacy of integrator's finances and insurance
 - Worst case ... out of business
- Potential liabilities
 - Vendor and customer costs to rescue projects
 - Vendor reputation for quality systems and solutions
- Few integrators achieve long term growth
 - Limits viable options for larger customers
 - Constrain your business and limit your market share
 - Recognize they need help and asking for it

Alliance Partner Training Requests




- System integration is difficult
 - Inherent challenges
 - Need for business acumen
- Relying on industry standard
 - CSIA name recognition
 - By integrators, for integrators
- No guarantee, but reduces risk
 - SIs still have to execute and grow
 - Should have mandated re-certification







For More Information

[Home](#)[About](#)[Services](#)[Partners](#)[Clients](#)[Contact](#)[Blog](#)

Building Better Integration Companies



Who We Are



Exotek is a full service management consulting firm that focuses on the engineering and systems integration industry. Our customers range from small independent firms to publicly traded product and services companies. The common thread is that our customers are leaders in the automation industry.


What We Provide



Our management philosophy centers on a "whole business" approach — an understanding that all aspects of your business must contribute to your success.

Oftentimes, our customers say that one or more areas of their company are limiting them from reaching their goals.

News and Events



NI Week Conference, Building Business Acumen Workshop, May 21-24, Austin, TX

[Find Out More Information Here!](#)

[Register for the Workshop Here!](#)

Exotek.com