SURVEY ON CYBERSECURITY MARKETING PROGRAMS FOR SMALL & MID-SIZE BUSINESSES (SMBS)

Produced by CyberHawaii

May 15, 2024

This report was produced by CyberHawaii for the Hawaii Department of Business, Economic Development and Tourism (DBEDT), the Chamber of Commerce Hawaii and the Hawaii Defense Alliance (HDA). It is intended to meet the requirement below:

5) Identify through means such as a survey, information technology companies that provide services for preventing or assisting with recovery following a cybersecurity event, and are willing to provide incentives to small businesses such as accepting a negotiated discounted rate for their services. Those information technology companies who have programs that provide incentives to small businesses will be highlighted on the website for cybersecurity best practices. Generate a report of the findings.

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EXECUTIVE SUMMARY

During the first quarter of 2024, CyberHawaii surveyed cybersecurity vendors who are actively selling products and services in Hawaii about their formal marketing programs aimed and Small and Mid-size Businesses (SMBs). Ten organizations responded, providing information on their products and services as well as their contact information.

Nine of the ten respondents are local organizations with the tenth being a national cloud services provider. While a few have formal marketing programs for SMBs, these mainly consist of items like educational events, initial risk assessments and either free demo software or a free starter version of their software. None of the vendors offer any discounts on services for SMBs nor do they offer bundles of services as a way to reduce the overall cost.

Most of the vendor respondents offer consulting services to help either assess the state of an organization from a compliance or risk perspective or that help with integrating solutions into an SMBs business. A number also offer managed services that allow SMBs to take advantage of offerings from national solution providers at a rate that allows them to only pay for what they use. Solutions are offered in all categories of the cybersecurity framework so SMBs should have some selection related to competing products. Because many of the top security vendors did not respond to the survey it is assumed that while SMBs will have a selection of products and services, there will not be many special offers that take into account their size and limited technical expertise.

While this survey accomplished the basic goal of understanding whether a significant number of vendors had formal marketing programs targeting SMBs in Hawaii, additional work should be done to better quantify the opportunity and SMB market characteristics. CyberHawaii makes the following recommendations for follow up activities.

1. **FOLLOW UP VENDOR SURVEY.** Establishing a recurring survey of information technology and information security vendors will increase participation over time and lead to a more comprehensive inventory of marketing programs.
2. **VENDOR INCENTIVES.** The State can develop a program of incentives for vendors who develop marketing programs tailored to SMBs. Tax incentives for sales to SMBs are one example of an incentive.
3. **SURVEY OF SMBS.** Perform a survey of SMBs about their needs related to cybersecurity. The survey of vendors performed here provides a picture of the supply side of the market. Determining what the demand is will help to complete the picture by identifying what products and services are in demand.
4. **AWARENESS CAMPAIGN.** Launch an education campaign to highlight local cybersecurity vendors and the products/services they provide.
5. **SECURITY INFORMATION SHARING NETWORK.** Develop a software-based information sharing network that will highlight cybersecurity threat information, products/services, system recovery services and solution integration services to SMBs. Establish this as a trusted user environment that will grow over time.

BACKGROUND

Small and Midsize Businesses (SMBs) are the life blood of Hawaii's economic engine. They can be found in all industry sectors and perform tasks that are critical to keeping our local economy strong. Ensuring that they have proper cybersecurity controls is thus a priority given the growing amount and sophistication of cyber threats.

By definition, SMBs do not have as many resources as larger organizations. Being able to invest in essential cybersecurity services can be a challenge, especially when their needs do not reach the volume thresholds established by vendors and they do not have the personnel to maintain security systems as part of their business model. These conditions increase the risk that SMBs face from cyber threat actors who are fine attacking companies of any size in their efforts to make money.

SMBs are attractive targets of cyber threat actors because of this and because many are part of the

To better understand the opportunities for SMBs to obtain cybersecurity services to help prevent cyber threats or help them recover if they are attacked, the State of Hawaii has requested CyberHawaii, through a contract with the Chamber of Commerce Hawaii, to conduct a survey of information security vendors to see if they offer specific programs to meet the needs of SMBs.

SURVEY METHODOLOGY

A survey was created in SurveyMonkey (https://www.surveymonkey.com/r/CPHJFZ3). It was available for response from January 03, 2024 through April 01, 2024, a three month period.

The survey contained the following questions.

1. Does your organization have a physical presence in Hawaii? If so, please provide address.
2. Describe the security products and/or services that you offer to SMBs?
3. Which of the following categories describe your services? (Check all that apply).

   ☐ Application Security
   ☐ Cloud Security
   ☐ Data Security
   ☐ Endpoint Security
   ☐ Identity and Access Management (IAM)
   ☐ Infrastructure Security
   ☐ Risk and Compliance
   ☐ Security Operations and Incident Response
   ☐ Business Continuity including Service Restoration and data recovery
   ☐ Other

4. Do you have a formal program to market your products and/or services to SMBs? If so, please describe the program in a few words.
5. If you do not currently have a formal marketing program to SMBs, is your organization open to starting one and do you see any specific barriers entry? Explain. Skip question 6.
6. Does your organization's marketing program include any of the following?

a. **SIMPLIFIED MESSAGING:** Your organization uses language that's easy to understand and highlights the benefits without overwhelming technical jargon. Focus on how your product/service solves their specific security concerns.

b. **AFFORDABILITY**: My organization offer scalable pricing models or discounts that align with SMB budget constraints.

c. **EDUCATION AND AWARENESS**: My organization provides educational content SMBs can understand related to common threats and how our solution mitigates them.

d. **EASE OF USE:** Small businesses often lack IT expertise, so my organization's products or services emphasize user-friendly interfaces and easy implementation processes.

e. **CUSTOMIZED SOLUTIONS:** My organization tailor's offerings to specific industries and/or business sizes. We show how our solution addresses SMBs unique challenges rather than emphasize a one-size-fits-all approach.

f. **DEMONSTRATE ROI:** We show the value and return on investment of our cybersecurity solution. We explain how it prevents potential losses from cyber threats, such as data breaches or downtime.

g. **CUSTOMER SUPPORT:** We provide customer support tailored to small business needs, such as assistance setting up or troubleshooting our products and/or services.

h. **PARTNERSHIPS OR BUNDLES**: Our organization collaborates with other services or product providers to create bundles of products/services that small businesses commonly use, making it easier for them to adopt multiple solutions at once.

i. **FREE TRIALS OR DEMOS**: We offer free trials or demos so they can experience the effectiveness of our product before committing to a purchase.

j. **OTHER**. Our organization offers the following additional services that encourage SMBs to do business with us.

7. Additional comments
   a. Enter any additional comments you may have.
8. If you would like your company name and responses to be shared with the State of Hawaii and SMBs who are registered with them, please provide the following information.

The survey was sent to CyberHawaii members and key community partners who were asked to share the survey with their information technology/security vendors and ask them to fill it out. This method was used because of the existing relationship between the vendors and our members which was felt would produce better responses that a request coming only directly from CyberHawaii.

Member organizations receiving the survey request included:

- ACTT Hawaii
- American Savings Bank
- Atlas Insurance
- Bank of Hawaii
- Booz Allen Hamilton
- DataHouse
- DR Fortress
- First Hawaiian Bank
- Hawaii Community Foundation
- Hawaii Dental Service
- Hawaii Gas
- Hawaii Pacific Health

- Hawaii State Federal Credit Union
- Hawaiian Telcom
- Hawaiian Electric
- HMSA
- Kamehameha Schools
- Kauai Independent Utility Cooperative
- Matson
- Referentia Systems
- Servco Pacific
- Techmana
- University Health Alliance (UHA)
- University of Hawaii

SURVEY RESULTS

Following are the details of the responses received to the survey.

RESPONDENTS

A total of 10 companies responded to the survey (one company responded twice). All companies have a physical office in Hawaii except for Cloudflare who has instances of their software hosted at DR Fortress. All respondents requested to be identified and to have their responses shared with the state.

Table 1. Survey respondent contact information

#	Company name	Contact person	Contact email address	Contact phone number
1	Cloudflare*	Melissa Loh or Scott Ashman	mel@cloudflare.com / sashman@cloudflare.com	(323) 919-4185 (melissa)
2	Pacific Business Services, Inc 1542 Young Street, Suite 202 Honolulu Hawaii 96826	Russell Paul Seeney	rseeney@pbshawaii.com	(808) 545-3722
3	HILLS23 CONSULTING LLC 2800 Woodlawn Drive, unit 133 Honolulu, HI 96822	Amalia Hilliard	amalia.hilliard@hills23.com	(808) 718-5897
4	Alani Group LLC 1090 Alahaki Street Kailua, HI 96734	Adrienne Chee	adrienne.chee@alanigroupllc.com	(808) 282-4436
5	GjB and Associates 1188 Bishop St. Suite 2110 Honolulu, HI 96813	Gordon Bruce	gordon.bruce@gjbandassociates.com	(808) 228-6044
6	Stellar Technologies 3375 Koapaka St., D198 Honolulu, HI 96819	Christine Davis	christine@stellar.tech	(602) 704-4293
7	Clonay LLC 1122 Nanialii Street Kailua, 96734	Yann Cloatre	yann@clonay.com	(808) 224-7871
8	Cyber Kia'I 99-040 Kauhale St #943 Aiea Hawaii 96701	Charissa Wong	info@cyberkiai.com	(808) 400-0217
9	MC3 Technologies 95-1024 Hoama St Mililani, HI 96789	Michael Cardenas	mcardenas@mc3technologies.com	(808) 400-4054

#	Company name	Contact person	Contact email address	Contact phone number
10	Pacific Business Services, Inc 1542 Young Street, Suite 202 Honolulu Hawaii 96826	Russell Paul Seeney	RSeeney@PBSHawaii.com	(808) 545-3722
11	High Tech Hui, LLC DBA Cyberuptive 401 Kamakee Street Suite 206 Honolulu, HI 96814	Charles Lerch	clerch@hitechhui.com or clerch@cyberuptive.com	(808) 781-3867

* However, Cloudflare does have a presence at DR Fortress where our Hawaii PoP is located.

DESCRIPTION OF PRODUCTS & SERVICES (QUESTION 2)

Question 2 asked survey respondents to describe the security products and/or services that they offer to Small & Midsize Businesses (SMBs). This was a free form question which allowed the respondents to answer in their own words.

The products and services provided can be broadly categorized into consulting services, managed services and host origination services. Companies like HILLS23 Consulting LLC, Alani Group LLC, Clonay LLC, Cyber Kia`I, MC3 Technologies specifically mention providing cybersecurity consulting services to SMBs. These companies are local and appear to focus on the SMB market. GjB and Associates provides services that focus on the DoD, Federal Government, State and Local Government, First Responders, Banking, Healthcare, and Retail industry segments. They provide a mix of consulting services and product development services.

Five respondents sell or resell management services related to cybersecurity. These services are primarily integrated into client's security architecture either on-premises, in co-location spaces or in the cloud. The companies in this space are Pacific Business Services, Stellar Technologies, MC3 Technologies, Pacific Business Services and High Tech Hui. Managed services can be a good way for SMBs to reduce their operating cost as most services are based on consumption so businesses only pay for what they use.

Cloudflare stands out as the lone respondent that provides its own services. At $2.76B in assets and over 4.1 million customers, they are the largest organization to respond to the survey. The fact that they offer bundles ranging from free to a monthly subscription makes them a good option for SMBs looking for a data virtualization service in the cloud.

Table 2. Description of products & services

#	Company	Response
1	Cloudflare	Cloudflare has 3 self serve options for cybersecurity for SMBs and Mid-sized companies (ie revenue <100k/yr). They are: • Free • Pro (25/mo) • Business (250/mo) Descriptions can be found at www.cloudflare.com/plans
2	Pacific Business Services, Inc	Primarily working with MSP connecting to their service for medium. Small, under 20 desktops, using HawTel or Spectrum circuits, small system routers.
3	HILLS23 CONSULTING LLC	• CMMC gap analysis for Level 1 and Level 2. • SPRS gap analysis. • Plan and Policy writing/support
4	Alani Group LLC	CMMC Risk Assessments and Cyber Security Consulting.
5	GjB and Associates	1. Cybersecurity requirements meeting ISO/NIST/CMMC standards. We are a CMMC Registered Practitioner Organization (RPO) with Registered Practitioners (RP) on staff. Most of our clients are SMBs providing services to the DOD. 2. Electronic Security Systems and Analytics: Extensive experience in the design, selection and deployment of Electronic Security Systems in the Department of Defense, Federal Government, State and Local Government, First Responders, Banking, Healthcare, Retail and Department of Defense Contractors. Check www.gjbandassociates.com
6	Stellar Technologies	Our flagship security offering includes managed detection and response, managed vulnerability, center of information security, baseline policy hardening and remediation. We have secondary services for email security, awareness training, managed firewall, and more. To begin the process, we recommend our IT GAP or security assessment.
7	Clonay LLC	Cyber security counselling and compliance
8	Cyber Kia'i	Cyber Kia'i is a cybersecurity consulting firm, providing expert guidance and support to Hawaii SMBs. Our team of experienced consultants works closely with clients to identify vulnerabilities and implement tailored solutions to mitigate potential cyber threats. From risk assessments to incident response planning, we offer a range of services to help safeguard your organization's valuable data and systems.
9	MC3 Technologies	• IT Integration/Support Services • Cybersecurity Consulting Services • Managed IT/Cybersecurity Services

| #	Company	Response
10	Pacific Business Services, Inc	• KnowBe4 • Zix Secure email • Sharefile secure cloud storage
11	High Tech Hui, LLC DBA Cyberuptive	• 24/7 SOC that is locally owned and managed • 24/7 Firewall Management, Cisco, Palo Alto, Sophos, Meraki, Fortinet 24/7 • MDR - Managed Detection and Response • Microsoft Office 365/Azure Security Management • CSPM CIEM PAM as a Service Zero Trust as a Service Network as a Service • vCISO - virtual Chief Information Security Officer as a Service • IAM as a Service Knowbe4 as a Service

CATEGORIES OF SERVICES (QUESTION 3)

Question 3 asked respondents to select the categories that their products and services fall into. Technical cybersecurity controls fall into a number of categories that cover the various aspects of the NIST Cybersecurity Framework. Over 90% of the respondents provide Risk and Compliance related services. The lowest percent participation (63.64%) categories included Application Security, Data Security and Infrastructure security. This may be because these categories of service are covered by turn-key software vendors who are not represented in this survey.

There were no categories that didn't have a respondent that provides services which means that Hawaii businesses have local options in all categories.

Q3 Which of the following categories describe your services? (Check all that apply).

Answered: 11   Skipped: 0
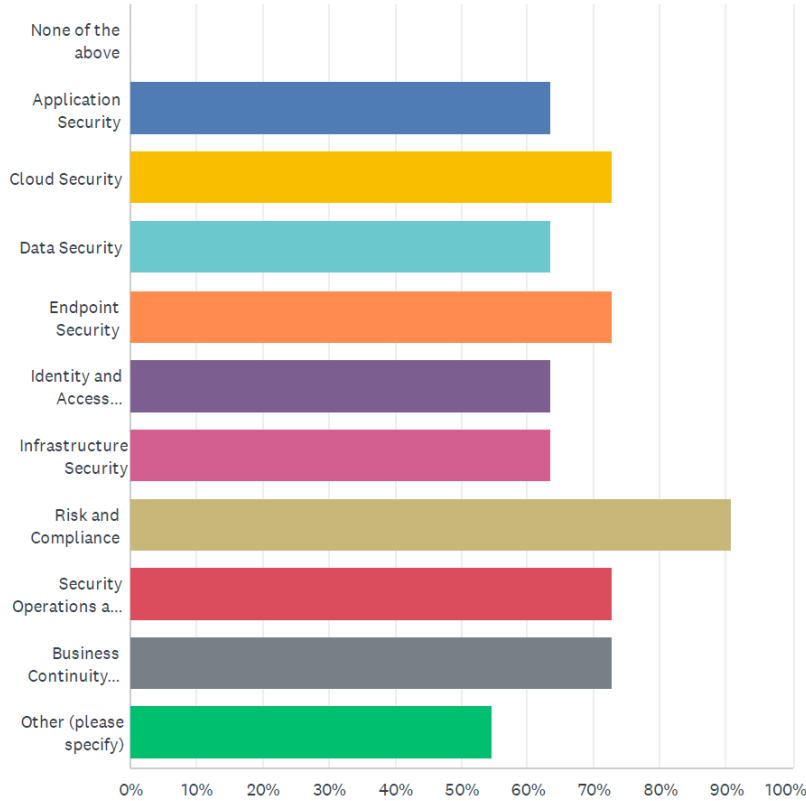
ANSWER CHOICES	RESPONSES	
None of the above	0.00%	0
Application Security	63.64%	7
Cloud Security	72.73%	8
Data Security	63.64%	7
Endpoint Security	72.73%	8
Identity and Access Management (IAM)	63.64%	7
Infrastructure Security	63.64%	7
Risk and Compliance	90.91%	10
Security Operations and Incident Response	72.73%	8
Business Continuity including Service Restoration and data recovery	72.73%	8
Other (please specify)	54.55%	6
Total Respondents: 11		

Table 3. Detail responses to Q3 including Other

#	Company	Application Security	Cloud Security	Data Security	Endpoint Security	Identity and Access Management (IAM)	Infrastructure Security	Risk and Compliance	Security Operations and Incident Response	Business Continuity including Service Restoration and data recovery	Other (please specify)
1	Cloudflare	X	X								At our Business Plan we are SOC1&2, ISO, BAA HIPPA, and PCI compliant
2	Pacific Business Services, Inc							X	X	X	
3	HILLS23 CONSULTING LLC							X			
4	Alani Group LLC	X	X	X	X	X	X	X	X	X	CMMC (Levels 1 & 2) Assessments
5	GjB and Associates		X	X	X	X	X	X	X	X	NIST/CMMC & Electronic Security Systems
6	Stellar Technologies	X	X	X	X	X	X	X	X	X	
7	Clonay LLC	X	X	X	X	X	X	X	X	X	Business Security Threat, Security Program, Risk Management, Compliancy and Regulation
8	Cyber Kia'i	X	X	X	X	X	X	X	X		
9	MC3 Technologies	X	X	X	X	X	X	X	X	X	DevSecOps
10	Pacific Business Services, Inc				X			X		X	
11	High Tech Hui, LLC DBA Cyberuptive	X	X	X	X	X	X	X	X	X	MDR, SOC, PAM, IAM
	Count	7	8	7	8	7	7	10	8	8	
	%	64%	73%	64%	73%	64%	64%	91%	73%	73%	

PROGRAMS FOR SMBS (QUESTION 4)

Question 4 asked respondents whether they had a formal program to market their products and services specifically to SMBs. 5 out of 11 (45%) of respondents indicated they do not currently have a formal marketing program for SMBs. The others respondents appear to have programs that provide SMBs with options such as free educational events, free entry level tiers, or support related to meeting operational standards or compliance requirements. Because the majority of the respondents have a local presence it may be possible for SMBs to negotiate favorable terms on a case by case basis.

Table 4. Formal marketing programs for SMBs

| #	Company	Q4. Do you have a formal program to market your products and/or services to SMBs? If so, please describe the program in a few words.
1	Cloudflare	Cloudflare offers many avenues of marketing including: blog.cloudflare.com ; community.cloudflare.com ; developers.cloudflare.com . We also regularly hold free events webinars and events for customers to attend.
2	Pacific Business Services, Inc	No
3	HILLS23 CONSULTING LLC	We currently offer: -General Cyber Hygiene package for introductory knowledge of Cyber. -CMMC Level One and/or Level Two gap analysis . -SPRS score review and analysis. -Plans and Policy writing /support to meet requirements.
4	Alani Group LLC	I do not.
5	GjB and Associates	We have developed a program that provides the ability to meet requirements for NIST 800-171 and prepare for CMMC 2.0 Law. Our marketing program is informal
6	Stellar Technologies	Yes, we have sales and marketing teams with campaigns and processes to educate around security threats, including assessments, free trials, demos, and in-depth review calls tailored to their environment and needs.
7	Clonay LLC	Simply Security; offering practical advice to effectively mitigate security risks and cyber threats through a comprehensive understanding of SMB capabilities and business realities.
8	Cyber Kia'i	Not at the moment.
9	MC3 Technologies	No
10	Pacific Business Services, Inc	No
11	High Tech Hui, LLC DBA Cyberuptive	Yes - we do we also host bsideshawaii.org, Loren our CXO is President of ISSA -

OPENNESS TO STARTING AN SMB MARKETING PROGRAM (QUESTION 5)

Question 5 was a follow-on question that asked respondents who said they didn't have a formal SMB program whether they were open to starting one. If the answer was yes, then they were asked if they saw any barriers to doing this.

Of the five respondents who said they didn't have a formal program to market two said they'd be open to starting one and three said they would not.

Q5 If you do not currently have a formal marketing program to SMBs, is your organization open to starting one? Skip question 6.

Answered: 9   Skipped: 2
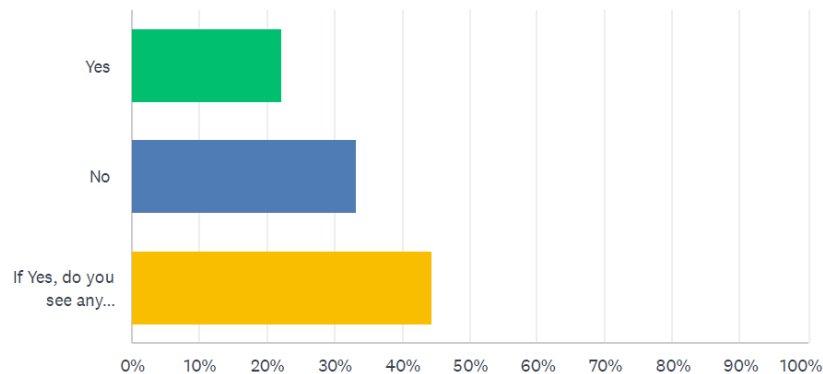
ANSWER CHOICES	RESPONSES	
Yes	22.22%	2
No	33.33%	3
If Yes, do you see any specific barriers to entry for your organization?	44.44%	4
TOTAL		9

The two respondents who answered yes, the barriers they mentioned to starting a program were:

1. The only barrier is that we support a minimum of 25 licenses. (Stellar Technologies)
2. Cost. (Pacific Business Services)
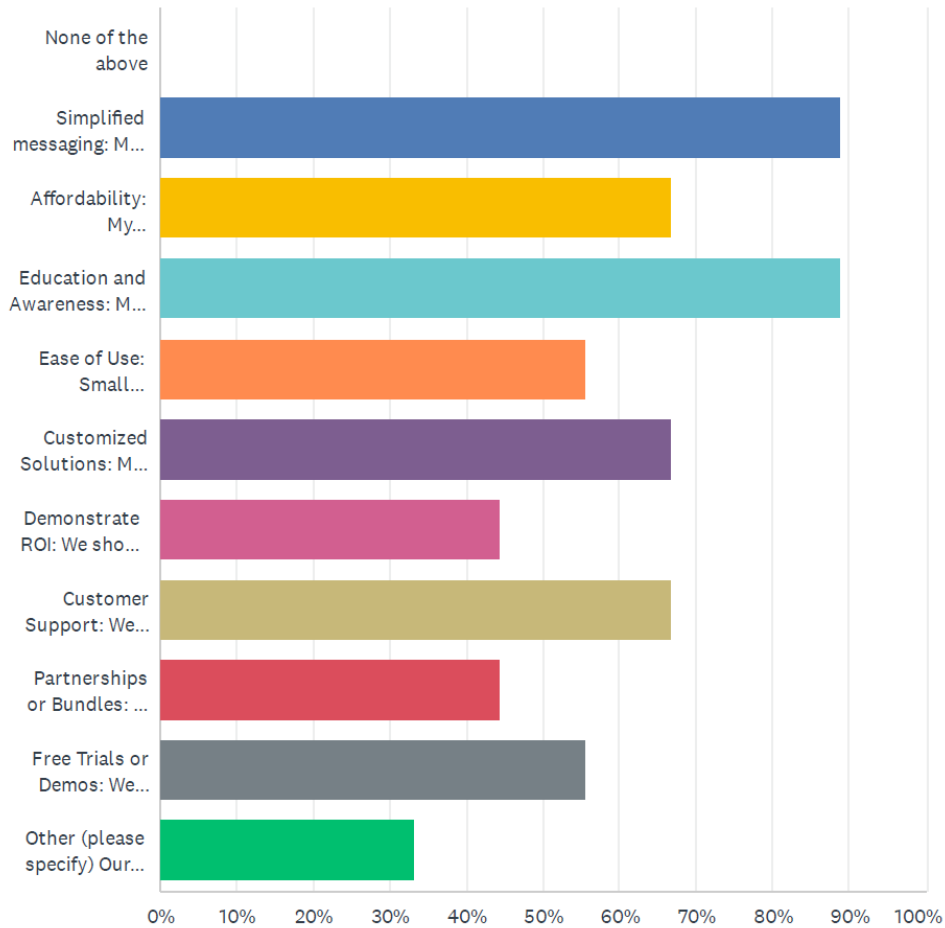
ELEMENTS OF SMB MARKETING PROGRAMS (Q6)

The largest number of respondents (88.89%) provide simplified messaging and education and awareness services that can help SMBs understand what their offers are about. The next highest categories at 66.67% were Affordability, Customized Solutions and Customer Support. A little over half the respondents (55.56%) cited the Ease of Use of the products/services and the fact that they offered Free Trials or Demos. Less than half (44.44%) indicated that they could demonstrate an ROI on their products/services or that they offered to collaborate with SMBs through the bundling of products/services.

Three respondents mentioned other elements of their marketing programs that were not listed in the standard options. A Free tier that allows SMBs to have control of their DNS settings (including DNSSEC), a global CDN, and basic DDoS Protection, and managed WAF; training support related to their business; and attempting to create a network of security businesses that can provide services when needed.

Q6 Does your organization's marketing program include any of the following? Check all that apply.

Answered: 9   Skipped: 2

ANSWER CHOICES	RESPONSES	
None of the above	0.00%	0
Simplified messaging: My organization uses language that's easy to understand and highlights the benefits without overwhelming technical jargon. Focus on how your product/service solves their specific security concerns.	88.89%	8
Affordability: My organization offer scalable pricing models or discounts that align with SMB budget constraints.	66.67%	6
Education and Awareness: My organization provides educational content SMBs can understand related to common threats and how our solution mitigates them.	88.89%	8
Ease of Use: Small businesses often lack IT expertise, so my organization's products or services emphasize user-friendly interfaces and easy implementation processes.	55.56%	5
Customized Solutions: My organization tailor's offerings to specific industries and/or business sizes. We show how our solution addresses SMBs unique challenges rather than emphasize a one-size-fits-all approach.	66.67%	6
Demonstrate ROI: We show the value and return on investment of our cybersecurity solution. We explain how it prevents potential losses from cyber threats, such as data breaches or downtime.	44.44%	4
Customer Support: We provide customer support tailored to small business needs, such as assistance setting up or troubleshooting our products and/or services.	66.67%	6
Partnerships or Bundles: Our organization collaborates with other services or product providers to create bundles of products/services that small businesses commonly use, making it easier for them to adopt multiple solutions at once.	44.44%	4
Free Trials or Demos: We offer free trials or demos so they can experience the effectiveness of our product before committing to a purchase.	55.56%	5
Other (please specify) Our organization offers the following additional services that encourage SMBs to do business with us.	33.33%	3
Total Respondents: 9		

Responses to Other services offered

1. We have a Free tier that allows SMBs to have control of their DNS settings (including DNSSEC), a global CDN, and basic DDoS Protection, and managed WAF. (Cloudflare)
2. Training support related to their business. (HILLS23 Consulting LLC)
3. Related to Partnerships or Bundles, it is one of my goals to connect other security organization when and if needed. (Using local network for expertise). (Clonay LLC)

ANALYSIS

The survey ran during the first quarter of 2024 and the expectation was for a robust response since the period did not have a significant number of holidays and is typically a time when new projects get started. The survey was sent out in a manner that should have allowed it to reach many of the well-known information security vendors doing business in Hawaii. A number of CyberHawaii member organizations confirmed that they did send the survey request out to their vendors and requested their cooperation.

The fact that only one national vendor responded could be an indication that the larger vendors do not have programs specifically aimed at selling to SMBs. This is understandable since its most efficient for them to deal with large volume purchasers who have a common set of goals and operating environments. SMBs tend to have differing sets of business objectives and often cannot purchase at a volume that catches the interest of national vendors. In industry segments where hardware products are sold, distributors or value-added resellers are often used by manufacturers to sell to smaller customers.

Managed Service Providers (MSP's) fill the role of distributors in the software/cloud market, providing solutions that cater to the smaller volume users. Three of the respondents (Pacific Business Solutions, Stellar Technologies, High Tech Hui dba Cyberdisruptive) indicated that they provide managed services related to connectivity, business services, and security services. They resell services from larger providers such as Microsoft and Hawaiian Tel.

The fact that there are local vendors offering information technology and information security services to SMBs is a good sign. SMBs have the opportunity to partner with local businesses as a way of designing solutions that fit their needs. They also have the ability to provide them with assistance related to setting up technology, configuring solutions or designing controls that meet compliance requirements.

Over 90% of the respondents provide Risk and Compliance related services. This includes consulting on Cybersecurity Maturity Model Certification (CMMC) compliance.

Over 90% of the respondents provide Risk and Compliance related services. This includes consulting on Cybersecurity Maturity Model Certification (CMMC) compliance. This is important given the Department of Defense's (DoD's) impending cybersecurity requirements and the complexity of being able to demonstrate compliance. SMBs will have to put in a significant amount of work to be able to demonstrate compliance, and having local companies available to assist them may provide a bit of comfort. The inability to demonstrate compliance with NIST-171, and ultimately CMMC, will cause SMBs to lose out on future revenue opportunities. The respondents offering these services do not appear to be large organizations and its not clear if they are able to raise awareness of their services using their own resources. Additional support from the State may be needed to educate SMBs about their compliance obligations in regulated industries such as DoD, Healthcare and Banking, as well as about the local organizations who are available to help them achieve compliance.

Accommodations mentioned for SMBs by the respondents included free versions of software, introductory packages, free initial consulting, free initial risk assessments and educational sessions. These offerings appear

designed to either assess the state of the SMBs business before any formal offer is made or to encourage them to try the products/services to see if they are right for them. There was no mention of discounts on standard pricing or of any type of bundling of services to reduce the overall cost to SMBs. Because most of the respondents provide consulting services, it could be possible to offer a standard discount off of labor rates (i.e., 10% off of standard hourly rate) for SMBs in order to reduce their cost. Quoting up front discounts is not common practice in the consulting industry, however. If discounts are given, they are typically quoted on the total amount of the work package. This makes the discount potentially linked to volume, which favors larger clients or jobs. Having vendors offer some type of up-front discount to SMBs would demonstrate a level of commitment that does not exist today.

The majority (88.89%) provide simplified messaging services that make it easier to understand the benefits of respondent's services independent of technical jargon. They also provide awareness services such as webinars and educational classes. It would be interesting to do a follow-on survey of SMBs to see how effective the simplified language from vendors is in building an understanding of the products and services being offered.

An area of improvement for vendors would be the ability to demonstrate the ROI of their products and services. Only 44.44% of respondents said this was something they could do. Business owners may be hesitant to invest significant monies in security products and services without the ability to quantify the impact to their business. The ability to demonstrate ROI is a challenge for all cybersecurity vendors as it

There seems to be a good distribution of service offerings across the various cybersecurity framework categories.

There seems to be a good distribution of service offerings across the various cybersecurity framework categories. This should give SMBs choices when they are looking for end point protection, network security, application security, cloud security or other categories of services. Many of the security services likely come from the software vendor themselves, which leaves the SMB to have to be able to configure the security settings of the application to the level that meets the value of their assets. From this standpoint, having local vendors who can help with the configuration of application software offerings has more value than having local vendors who develop their own software (given the dominance of national vendors).

A comment of interest was made by Clonay LLC related to their goal of connecting security organizations together to provide services to SMBs in a coordinated manner. This concept would help to address one the difficulty that local vendors of security services face related to making themselves known to the business community in general. Developing some type of information sharing network where local vendors can discuss their services would provide SMBs with a place to go when they are interested in looking into information technology and information security services.

RECOMMENDATIONS

This survey was valuable for identifying local vendor offerings for cybersecurity products and services. It demonstrated that SMBs do have options when it comes time to selecting local partners to work with. When taken in the context of other efforts to assess SMB cybersecurity readiness and to test it, the vendors identified could become an integral part of any remediation efforts for participating SMBs.

The following recommendations are made to continue to build resilience to cyber threats in local SMBs.

1. **FOLLOW UP VENDOR SURVEY.** Establishing a recurring survey of information technology and information security vendors will increase participation over time and lead to a more comprehensive inventory of marketing programs.
2. **VENDOR INCENTIVES.** The State can develop a program of incentives for vendors who develop marketing programs tailored to SMBs. Tax incentives for sales to SMBs are one example of an incentive.
3. **SURVEY OF SMBS.** Perform a survey of SMBs about their needs related to cybersecurity. The survey of vendors performed here provides a picture of the supply side of the market. Determining what the demand is will help to complete the picture by identifying what products and services are in demand.
4. **AWARENESS CAMPAIGN.** Launch an education campaign to highlight local cybersecurity vendors and the products/services they provide.
5. **SECURITY INFORMATION SHARING NETWORK.** Develop a software-based information sharing network that will highlight cybersecurity threat information, products/services, system recovery services and solution integration services to SMBs. Establish this as a trusted user environment that will grow over time.