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Sample

Technology Assessment Summary

Prepared by: [Net-Aid](#)

[Company]

[Title]

[Address]

[City, State Zip]

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[Web site]

[E-mail]

[Date]



Overview

Net-Aid LLC was engaged to do a technology assessment of the technology platform for [PROSPECT] and their locations. Net-Aid LLC interviewed [PROSPECT] using the Small Business Assessment Toolkit provided by Microsoft to help gather information and develop the best solution for the client's technology implementation. This report is a summary of findings, in addition to on-site work and technician recommendations. It is designed to provide a high-level overview and not to be a complete prescription to solving areas that require remediation. The following information was provided by [PROSPECT] and is attached at the end of this report.

- Hardware Inventory
- Printer Inventory
- Software Inventory
- Business Applications
- Network Infrastructure Inventory
- Vendors

Current Situation

This analysis uncovered a variety of issues with the technology platform at [PROSPECT]. While there are many positive areas, there are also some deficiencies that need to be addressed. Many of these are already being reviewed, and we want to commend the management for taking the initiative to address the situation. There are still a number of concerns raised through our findings, and these need to be addressed over time and included in future budget plans to ensure they are remediated on a scheduled timeline.

Hardware

Upon review of your hardware platform, [include findings]

Printers

Upon review of your printer and fax assets, [include findings]

Software

We discovered [include findings]

[Introduce Microsoft® Windows® Small Business Server 2008]



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Business Applications

[\[include findings\]](#)

Network Infrastructure

Proactive maintenance is the key to a strong network infrastructure. It requires a disciplined maintenance plan to gather the information needed in order to create a stable and dependable network. Network monitoring should be used to help identify efficiency of the network. The network infrastructure [\[include findings\]](#)

Connectivity

We discovered [\[include findings\]](#)

Wireless

Your wireless network [\[include findings\]](#)

Network Storage

Data is one of the most critical assets of any business. We found [\[include findings\]](#)

Power

Nothing works without solid power to feed the system. We have identified [\[include findings\]](#). Power-off safeguards need to be implemented to prevent accidental shut off of power to key outlets.

Telephony

The ability to communicate with customers, vendors and others outside the walls of your business is critical. We examined [\[include findings\]](#)



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Technology Management

Your technology management policy [\[include findings\]](#).

Remote maintenance of servers and other critical IT assets can be configured to allow our staff to monitor and repair many issues from afar. This increases response times and reduces down time.

Security

In today's world, security is becoming an ever more important area of concern. We discovered [\[include findings\]](#).

Internet Use

Your utilization of the Internet [\[include findings\]](#)

Content filtering will keep employees from surfing the Web and accessing content that is not appropriate for their job. We can also lock down Internet access to limit the sites that they are allowed to see, reducing the time waste often associated with internet use. This can also have legal implications in the event it is not handled appropriately.

Malware

Upon review of your policies around malware, we discovered [\[include findings\]](#)

Backup

Protection of data requires a significant level of planning and discipline. We found [\[include findings\]](#). Testing of the backup/restore functionality needs to become a routine maintenance process. Far too often tape drives fail, and clients do not discover it until a critical piece of data is needed only to find it has not been backed up. Tapes need to be replaced every 6-12 months to assure quality backups.



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Maintenance and Monitoring

The ongoing upkeep and monitoring of your technology [\[include findings\]](#).

Patch Management

The policy regarding patch management [\[include findings\]](#)

Data Storage

One of the quickest growing areas for most businesses is the amount of data that their networks are moving and storing. We discovered [\[include findings\]](#)

Mail Storage

As e-mail is often a preferred communication method, you need to prepare for the way users handle e-mail. It is now used like file storage by many. We recommend [\[include findings\]](#)

Access

Remote access to data and the network is now becoming a standard. VPN accessibility and remote access would allow sales staff or other employees to access the network securely from the road or home. This can be accomplished to provide access to data and information critical to their jobs 24/7. We suggest [\[include findings\]](#)

Training

One area that many companies overlook is the need to train users to get the maximum performance from their employees. As new technologies are implemented or upgraded, there are many new features that can be used if training is provided. Unfortunately, many of these time-saving and productivity features are not used because of lack of training. For instance, the features in Microsoft Office 2003 and Outlook are powerful tools for calendaring, sharing of information and collaboration. Microsoft SharePoint Services is another magnificent tool that can enhance a business in significant ways if implemented and used. We believe additional training in these areas would benefit your company:

[\[include recommendations\]](#)



New Technologies

There are a number of new technologies and solutions we see other businesses implementing that need to be considered and planned for. Here is a partial list for your consideration:

[Sample Recommendations]

- a. **Handheld devices.** Many businesses are now equipping their staff with handheld devices, such as Windows Mobile-based Pocket PCs or Smartphones.
- b. **GPS.** Many businesses are implementing this technology for tracking resources.
- c. **Digital cameras.** Both still and video digital cameras are becoming mainstream, and allow easy transfer to Web properties as well.
- d. **IP security systems.** Many businesses are implementing IP security cameras in and outside their buildings to monitor activity. These can be connected wirelessly to allow easy implementation where cable is not available or practical to install.
- e. **Multimedia projectors.** Businesses are purchasing multimedia projectors for conference rooms and meetings to make large group presentations.
- f. **Mobile technology.** Microsoft Notebooks, Tablet PCs and Windows Mobile-based devices can help in situations where data needs to be collected. This is very applicable in a rough environment or in the field. Ruggedized technology is available to make these devices less susceptible to damage and failure.
- g. **Document imaging.** Paper is a major problem for many businesses, both from a storage and search perspective. Document imaging reduces the need for file and storage areas, creates a way to backup electronically all data and also allows quick retrieval without hours of hunting paper down. This can reduce the cost of storage and printing as well.
- h. **DVD authoring software and hardware.** With the advent of less expensive digital cameras, we see an increasing trend to teaching DVD authoring. This can be part of marketing activity.
- i. **Wireless Internet.** Wireless access should be evaluated. The limiting issues may include wireless coverage and bandwidth.
- j. **Electronic business cards and CD-based marketing** materials have become very popular ways to differentiate a business from competitors.
- k. **E-mail marketing** can be a very cost-effective way to reach many people for a fraction of the cost of traditional direct mail campaigns.

Net-Aid LLC looks forward to continuing to helping [PROSPECT] achieve success. We applaud your commitment to excellence and look forward to serving your needs.