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IT ASSESSMENT CHECKLIST

Using this handy checklist will guide you through a detailed process to arrive at strategically sound decisions regarding IT transformation options. There are distinct advantages to bringing in a consultant to help:

- Unbiased, objective evaluation of your environment and numbers.
- A speedier and more thorough process.
- Additional outside knowledgeable insight.

Whether you choose to work with a consultant, or not, you should set up an initial meeting to explain how they approach their work and how that can help you reduce costs and obtain better services.

IT Infrastructure Assessment Checklist

Step 1: Create a baseline of what you have today.

First step is to create an end-to-end view of where you are now with details to establish a view used to compare directly with marketplace solutions. Your data gathering should include the following elements:

Identify all current service costs and outputs.

Organization / Staffing:

- Organization chart for IT functions.

Technical Data:

- Server and Storage inventories and configurations.
- Software inventories.
- Network Infrastructure.

Financial Data:

- Detailed budgets.
- Asset listings showing capital and depreciation.
- Contractual commitments such as leases and maintenance.
- Include any costs outside the IT budget that could be directly affected by changes to the delivery model (e.g., facilities).

Service-level and process data:

- ITIL objectives and reports (incidents, changes, etc.)
- Audit and compliance requirements.
- Treat disaster recovery as a separate service-level.

Organize all your data into a dashboard, in a way that gives an apples-to-apples comparison to what's in the marketplace today.

HINT: How you organize and process your data can vary. Organize so you understand where you stand in the marketplace. Disaster recovery is an example.

Follow an "iterative approach," an agile methodology. Build your assessment, go back and validate your numbers, build your projections, go back and validate your numbers, keep iterating to fill in the gaps. You may go through as many as 50 iterations of your dashboard.

Let your data drive the solutions, by digging where the numbers tell you to look.

Clearly identify what you want to accomplish, so you'll be able to clearly identify the cost.

For example, you may:

- Need to consider HIPAA, PCI or other compliance requirements.
- Want to avoid offshoring.
- Be interested only in remote infrastructure management, or only cloud computing, or maybe just a dedicated collocated datacenter environment.
- Avoid upcoming major capital expenses (e.g., a new diesel generator, a complete refresh of equipment, a major software renewal).

Step 2: Prepare two working documents.

First, create a worksheet defining your costs and volumes, break them down by service area and show unit costs.

Second, create a word document defining your service profile:

- State of the environment, challenges and desired direction.
- Opportunities to convert fixed costs to variable costs.

Step 3: Follow a delivery model-driven process.

Providers can offer different delivery models - cloud, server collocation, offshore, onshore, etc. You need more than just the facts to determine which is best for your environment.

Critically look within, to expose hidden agendas and identify issues that affect your operation. Shortcomings that may be addressed with a sourcing transaction include:

Aging staff, causing worry about your ability to maintain skill levels.

Intention to get off a platform - affecting your base case, because providers need to understand your true needs to prepare an appropriate proposal.

What strategies and challenges are you facing?

What platforms are you running?

Step 4: Assess, don't benchmark.

Benchmarking compares you to generally out-of-date information from other companies, but doesn't define any direction you can take based on that information.

An Assessment enables you to compare what a vendor would do against your workload using tools such as QlikView's analytics tool to produce visualization reports helping make the comparison easier.

Assess cloud options:

Figure out your costs.

Identify priority applications to move to the cloud.

Determine the cost.

And, of course, you can use your assessment as a tool to optimize internal solutions, if desired.

This is IT Infrastructure Assessment Checklist is a reality check. Gartner says half of companies plan to increase outsourcing within the next seven years. An Assessment is fundamental to deciding what to outsource and/or what to put in the cloud, and it's crucial to think in terms of all-inclusive cost. 5-year projections typically show:

You usually can't deliver as fast and as efficiently as an outside supplier can.

Outsourcing is generally less expensive than running your workload in-house.

Sourcing can "fix" gaps in your services that have surfaced due to years of cost cutting in a troubled economy.

Sourcing can provide skills and technologies not currently available in your environment.

There's no reason you can't use this checklist as a guide to conduct your own assessment. But the right consultant can help you get better results, faster, by:

Working hand-in-hand with you to build a dashboard that's undeniably complete and accurate, by repeatedly probing until all gaps are filled in. Even C-level skeptics will readily accept these results Custom-fitting solutions working for you, based on extensive industry experience and familiarity with marketplace capabilities and costs.

Employing an agile, "asset light" approach tailored for each client, handing most of the "grunt work" so that you can focus on analysis and decision-making.

About The Windsor Group

CEOs, CIOs, and CFOs rely on strategic initiatives to take their organizations to the next level. Selective IT Services Outsourcing enables businesses to maintain a competitive edge. The Windsor Group helps executives implement enterprise wide sorts to realign organizational priorities, ensuring that core competencies and strategic initiatives are synchronized from a technology perspective. Contact us to explore your IT transformation options.

*We'd Like to Hear More About
Your Business and IT Challenges,
so that We Can Find a Solution
that Exceeds your Expectations*

Talk to Us