5. TECHNOLOGY ROADMAP

Based on our discussions, we have identified the issues below as being particularly important to the business success of XXXXXX:

1. *Management and users are unhappy with the current state of IT*
2. *Money is being wasted on software licensing*
3. *It is difficult and expensive to manage on-site servers and provide user support*
4. *The company wants to be more aggressive in its sales and marketing efforts*
5. *There are multiple paper processes in place that could be digitized and automated*
6. *Company management needs to understand the technology climate and budget for the future*

These issues are listed in order of importance.

Each section below discusses the business issue, the technology to be considered, and an approximate price in more detail.

1. Management and users are unhappy with the current state of IT

Details— The company does not feel it is getting value out of its technology solutions. They spend money on IT every year but are having a hard time figuring out what they are getting and where they should be going.

Downtime and inefficiency are a major problem for the company and are costing them thousands of dollars each year in lost time and revenue.

Solution— Perform a technology assessment. A technology assessment will examine and evaluate the company's information technology infrastructure, policies, and operations.

It includes both a technical review and a set of interviews with management and staff to discuss how they use existing technology and where their pain points are.

A final report will give the company a clear picture of its technology environment, its IT security posture, and areas where it can make positive changes to reduce downtime and inefficiencies.

Estimated Cost— A typical engagement for a technology assessment costs between $5,000 and $10,000 depending on its scope and the complexity of the environment.

2. Money is being wasted on software licensing

Details— Rapid changes in the size of the company has left them unsure about where they stand with software licensing. They seem to have too many licenses for some software packages and too few for others.

They want to ensure that they are in compliance with all of their licensing terms and also that they are licensing software in the most efficient manner.

Solution— Review and optimize software licensing.

In the case of Microsoft licensing, this will involve moving all Office licensing to a Microsoft Cloud Service Provider (CSP). Managing licenses through a CSP will save the company money and make it easy to add and remove licenses.

For other software packages, determine if the company has the correct number of licenses and look for the most cost-efficient way to purchase and manage those licenses. Then provide ongoing license management, either as part of a fractional CIO subscription or on an hourly subscription basis.

Estimated Cost— A licensing review will generally cost around $7,000. Companies usually save more than that annually by optimizing their licensing strategy.

3. It is difficult and expensive to manage on-site servers and provide user support

Details— The company has no dedicated IT staff to maintain the servers it runs on-site. It is difficult and expensive to hire people to maintain the servers and having servers in the office makes them insecure and subject to power outages.

In addition, as the company grows, its users have greater support needs. The company needs support for its infrastructure and users 24X7X365.

Solution— Move the servers to the cloud and contract with a managed service provider (MSP) for 24X7X365 server maintenance and user support.

The first step int his process is to formulate a plan to move the servers to the cloud using Amazon's six "Rs" and Microsoft's Cloud Adoption Framework. Adequate planning ahead of time will ensure that the migration goes smoothly.

Once the plan is in place, TransformITy can help choose the best MSP and then manage the entire conversion as well as the ongoing relationship. TransformITy works with multiple MSPs so that we can always make sure each client gets the best pricing and service.

Going forward, the MSP will provide ongoing maintenance for both the servers in the cloud and the company's computers, printers, and network as well as helpdesk services.

Estimated Cost— Managed services vary according to the number of servers and users under contract and the length of the contract.

4. The company wants to be more aggressive in its sales and marketing efforts

Details— There is no central repository for the company's contacts and, therefore, no way to use them to get new business. Beyond this, the company's sales process is disorganized and impossible to manage.

The company wants to improve its marketing and, especially, focus on getting new business. This means they need a CRM system that includes the ability to track and manage leads through the sales process.

Solution— Implement a cloud-based client relationship management (CRM) system to manage contacts and build a sales pipeline.

A cloud CRM solution will give the company the tools they need to improve their online marketing, including sending and tracking custom email messages. It will also let the company build an easy to use sales pipeline. The software will make it easy for people to enter leads and then provide structure for the process of turning those leads into paying customers.

Estimated Cost—CRM pricing generally starts at around $20 per-user per-month.

5. There are multiple paper processes in place that could be digitized and automated

Details— The company needs to be more efficient administratively as it grows. Many processes in the company revolve around moving paper forms around. Other important processes, like onboarding new employees, have no formal definition whatsoever. Things slip through the cracks and using paper wastes time and money, especially with so many people working remotely.

To address these issues, the company wants to re-design and automate some of their critical business processes.

Solution— The first step is to bring people together to map the relevant processes. Once each process is mapped, a cloud process automation application can be configured with forms and workflows.

These applications provide all the tools necessary to automate business processes, including rule-based routing and a dashboard showing each user the items they have in process.

Estimated Cost— Automated workflow systems can cost between $400 and $800 per-month for the entire company to use.

6. Company management needs to understand the technology climate and budget for the future

Details—It is difficult for the company to keep abreast of everything that is happening in technology that could help them be more profitable. Too often they are using technology defensively and not strategically.

Beyond planning, the company needs help managing technology and making sure that it is budgeting the right amount each year.

Solution— Sign up for a fractional CIO subscription. For a reasonable fixed price, the firm can get all the help it needs.

A fractional CIO subscription provides a dedicated block of hours at a reduced rate. These hours can be used for help with IT planning, budgeting, or to implement technology projects that move the firm forward and drive revenue.

The subscription also provides for priority service in case of an emergency and a reduced hourly rate for work on projects.

Estimated Cost—Fractional CIO subscriptions can cost as little as $1,000 per-month.