1SOURCE TECHNOLOGY ASSESSMENT QUESTIONNAIRE

Existing Technology

The goal in this section is to review the existing technology. This will help us to know which assets are available and understand other facets of your current technology platform, while we develop our thoughts around the solution that will be most effective to achieve the business goals. Be sure you are very detailed in your assessment, as this area can create many issues later in the process if the information is inaccurate or sketchy.

Questions	Answers
Hardware - Servers/Clients/Thin clients	
How many servers do you have within your infrastructure?	
How any client systems (desktop/Laptops) do you have on your network?	
Do you have client devices in other locations? How many are they? Distributed across how many locations?	
How much better could your business function if you had new hardware?	
How does staying with your current hardware affect your productivity? Profitability?	
Do you lock down desktops to prevent changes and create a standard environment?	
Do you use any thin clients or terminal services to allow access of software from the server rather than being loaded and run locally?	
Printers and Fax Machines	
How many printers do you have across the network?	
Do you know what the cost is per printed page from your current output devices? Have you done a cost analysis on your current printer use?	
What are your biggest frustrations in regards to printing?	
What are your most frequent service issues regarding printing?	
Who is responsible for printer and fax maintenance and operations?	
How do you manage consumables?	
Do you use network-based fax solutions?	

What is the primary use of faxing - inbound, outbound, or both?	
Software - OS/Applications/Licensing/SAM	
Can you provide licenses for all software that is installed?	
Do you have upgrade protection or software assurance contracts on all software?	
Can we access support directly from your software vendors?	
Is any of the software proprietary or custom developed – if so do you have support access?	
What software applications do you anticipate needing in the future?	
Have you ever considered leasing software applications?	
Business Applications	
What do you use for your primary business application software?	
Do you have maintenance contracts on all software?	
Is your line-of-business application SQL-based?	
Would you be interested in centralized management of your client applications?	
Who is the company contact for your business software?	
Would it be appropriate for us to contact them directly on your behalf?	
Will you need to connect to any back-end host systems for line-of-business applications?	
Has the line of business application been modified for you specifically – if so do you have access to support?	
Are there any business processes that your current applications don't address?	
Would you like to discuss the development of a solution specifically to address problem business processes?	
Network Infrastructure	
How are your computers connected to one another? (e.g., peer-to-peer, client-server)	
What is the network topology and cable type?	
Is the current network mapped and labeled?	
Are there extra ports available to allow for growth?	
What other technology runs over the network?	
Is there adequate speed on the network today?	
Are your network ports all labeled and mapped?	

Is network traffic monitored in any way?	
Do you have any remote locations or WAN Solutions?	
Do you have any fail-over or security reservations about having your business on a single server?	
Do you have branch offices that need local access in the event links go down?	
Connectivity, Internet and E-mail	
Who is your current provider of Internet connectivity?	
What type of connection and speed do you have?	
Is Internet use critical to your business?	
Are there any service level agreements (SLA)?	
Who does/doesn't need access to WAN and Internet?	
Do you have multiple connections to the Internet for failover?	
How many users will be using e-mail?	
Will they be on the network, or working from a Web interface?	
Do you use instant messaging programs?	
Internally and externally?	
Is there need for any group e-mail boxes?	
Any groupings of employees for distribution?	
Who hosts your e-mail?	
Is your WAN IP address dynamic or static?	
Are extra static IP addresses an extra cost and are they readily available?	
Would there be value in having anytime access to your data?	
Wireless	
Do you currently have a wireless network?	
If so, is it meeting your requirements?	
What security practices are in place for your wireless network (e.g. encryption, address filtering, etc.)?	
If you are not currently using wireless, are you planning to implement it in the future?	
Is the wireless secured or configured for guest access?	
If secured, in what manner is it secured?	
Is the coverage complete or do you need additional access points?	
Does the current quality of the wireless network meet your requirements?	

Is your wireless network used for connecting networks in different buildings, for PC access, or both?	
What type of mobile devices (e.g., smartphones or Tablets) are your employees using today?	
Do you subscribe to wireless data?	
Are you currently using mobile devices to run mobile applications and, if so, what type of applications are you running?	
Network Storage	
Where is your data stored?	
Who has access to the files?	
How much hard drive space do you currently use and how much did you use last year?	
How do you archive older data?	
How long does data need to be online?	
Do you expect a large amount of growth?	
Do you have a file structure that all users follow?	
Do you have any control on data movement to notebooks, CDs, DVDs or USB devices?	
Power	
How often do you have power issues?	
If you have had an issue, when was the last incident?	
Do you have power protection currently in place?	
Do you use battery-based UPS's or backup power generators?	
When were the UPS batteries last tested or replaced?	
If there are remote sites, do they have the same protection?	
Is the building grounded properly?	
Are all networking devices and closets protected?	
Is connected equipment set to use auto shutdown processes?	
Is power monitored in any way?	
Can you handle a long-term power disruption?	
Are power-off safeguards in place in electrical panels?	

Technology Processes and Policies

The goal of this section is to understand your current and perceived processes and policies regarding technology. This is vital to implementing a solution that will work to your satisfaction. It is possible to create a technically sound proposal and then find that it is rejected or causes ongoing frustration because it does not align with your processes, both technology and business.

Questions	Answers
Technology Management	
Do you have a written technology policy?	
How often is it reviewed and when was the last time?	
Are critical IT roles cross-trained to assure continuity?	
Do you need to be able to manage the server from outside the office?	
Is vacation or absentee coverage planned for?	
Do you have a help desk system to track support tickets?	
How are event logs monitored?	
What is the documentation process on the network?	
How long does it take to add a user to the network?	
How long does it take to prepare a new workstation for the network?	
Are you familiar with the power of group policies and their use?	
Security	
Do you have a written security policy?	
How often is it reviewed and when was the last time?	
Do you have a point of contact for security?	
When was the last security audit?	
Have you had a penetration test?	
What is your current password policy?	
Do you use any two-factor authentication access logons?	
Biometrics?	
Who has administrative access?	
Are there any known vulnerabilities in the current configurations?	
What is your process when an employee is terminated?	
Do you address physical security?	
Do you record activity?	
Are you using video surveillance for security?	

Are all critical technology assets safe from non-authorized contact?	
Have you addressed external or perimeter security concerns?	
Who reviews the security status on a regular basis?	
Is there any information on your laptops, smartphones or tablets that would be crippling to your business if lost?	
Would your competitors be able to use information on a lost notebook effectively to compete against you?	
Internet Use	
Do you have a written Internet usage policy that all employees have been trained on?	
How often is it reviewed and when was the last time?	
Do you monitor or log Internet use by users?	
How do you get reports?	
Do you block high-volume access problem sites?	
Have you considered the legal liability of not controlling Internet access?	
Are there any sites or activities related to the Internet you would like to block?	
Do you use content filtering software?	
Spam, Malware and Anti-Virus	
Do you have a written anti-virus, spam or malware policy?	
How often is it reviewed and when was the last time?	
What solutions are used?	
How are they kept current?	
Who monitors that they are being updated properly?	
How is it being monitored?	
How much spam do you deal with daily?	
Do users have multiple e-mail addresses to separate business and personal use?	
Have there been any recent virus outbreaks?	
What has the financial impact of malware been?	
Backup	
Do you have a written backup policy?	
How often is it reviewed and when was the last time?	
How often is the recovery process tested?	
When was the last time?	

Could you restore your data and get back to normal operations?	
Are you running the most current version of your backup software?	
When did you last change to new tapes or drives?	
Who is responsible for monitoring the backup?	
Are tapes taken off site each day?	
What is your tape rotation strategy?	
How do you protect data on local workstations?	
Is there any remote off-site backup strategy?	
What is the size of your current backup?	
What is the window of time that is available for backup?	
What is your current backup process?	
When/where?	
What files are backed up and what files SHOULD be backed up?	
Do you archive data longer than your normal backup process?	
And where?	
How do employees keep access to the latest files?	
Do they synchronize with the network?	
Proactive Maintenance and Monitoring	
Do you have a process in place to maintain and monitor the network and systems?	
Is this done remotely?	
What hours?	
If so, what tools are used?	
Are these tools working effectively?	
Do your technology partners do any remote support?	
What tools do they use?	
What would be the value of a scheduled maintenance program for your PCs?	
Network devices?	
Do you manage and maintain a service ticketing system?	
Do you keep change logs of all maintenance?	
Patch and Service Pack Management	
What is your patch and service pack management strategy?	
Who is responsible for monitoring and applying patches and service packs?	
Do you have a patch or service pack management policy? (Gather copy)	
What tools are you using?	

Are records kept on the patches and service packs applied?	
What is the process if a patch or service pack fails to install correctly?	
Have firewalls and routers been upgraded to the latest firmware?	
Data storage	
Do you have a written data storage policy of what can be stored on company resources?	
Mail Storage	
Are there limits to how much storage each user is allowed?	
How often is it reviewed and what is the current status?	
Do you have a process for checking for the compliance?	
What is the maximum storage that should be allowed per mailbox?	
How long should mail be retained?	
How are PSTs being protected?	
What kind of e-mail load would you project for your organization?	
Remote Access	
Do you have a written remote access policy?	
How often is it reviewed and when was the last time?	
Do employees need access to company resources from home or outside the network?	
What resources do they need?	
Would productivity improve if more access was provided?	
What would the impact be to the company?	
What is the primary use of remote access?	
Would you like to access your desktop at work from anywhere you have Internet access?	
Training	
How is ongoing technology training performed?	
Do you have a written policy?	
When was the last time it was changed?	
Does this adequately cover the needs of a new employee?	
Do these policies allow for change as technology changes?	