

Sample Technology Assessment Report



ABC Company Pty Ltd
123 Sample Street
Sample Town,
SAMPLE ###

Summary of Findings

Revenue Generation



1. Web site is limited to one-page description. The organisation has the opportunity to create a more robust web presence. Such a presence can include an electronic newsletter to stay in touch with prospects, more educational information about the services offered (e.g. a white paper or article), and client case studies/testimonials.
2. The organisation has limited knowledge of Publisher software used to produce its client newsletter, including no experience using photos and graphics to make the newsletter more engaging.
3. The client database does not allow for easy analysis of revenue and profitability by client, and principal, making it difficult to assess which clients have the most potential for long-term relationships.
4. The organisation has the opportunity to take advantage of web-based teleconferences to collaborate with new offices being developed, and to speak with prospects and clients.
5. The firm could utilise PowerPoint more effectively to make its marketing meetings with prospects more engaging. Currently presentations lack graphics, and are filled with more text than readers can effectively absorb

Productivity



1. The marketing department indicated that they would benefit from training on conducting information searches over the Internet, so that they can be more productive.
2. Some employees are uncomfortable using some of the more advanced features in Word for writing and formatting corporate documents.
3. The organisation could benefit from an Intranet that allows for online data sharing, centralised scheduling, and collaboration among employees about

client issues. This finding will be even more valid when the organisation opens multiple offices.

System Effectiveness and Efficiency



1. The current database software solution is no longer support by the vendor, and performs more slowly than desired.
2. Maintenance is only done when needed, resulting in higher-than-required repair bills.
3. Printers have to be sent off-site for repairs, and are a major bottleneck – both in terms of speed and the number of printers.
4. The network has some cables running across the office on the floor, which represents a safety hazard.
5. Internet access is currently dial-up, which significantly slows searches.
6. Employees report that some PC's have a tendency to crash, and run more slowly than they should/expect.

Security



1. Back-ups of data are done inconsistently, if at all, putting the organisation in serious risk of lost or damage data in case of a crash, virus, or disaster.
2. Back-ups, when done, are not protected, compounding the above risk.
3. Virus protection software license expired last month, and the organisation currently has no protection from viruses.
4. There is no process to ensure that employees do not take confidential client data with them when they go. This presents a significant security risk, and potential legal liability.

Recommendations

1. Upgrade the CRM software solution to a faster, supported version. This will improve productivity, and also reduce risk.
 - a. Analyze available systems to assess best ROI.
 - b. Backup old systems.
 - c. Install new hardware.
 - d. Restore database.
 - e. Ensure that system is performing to specifications.
 - f. Train new personnel.
2. Train appropriate personnel on the following applications, in order to improve productivity and improve marketing effectiveness:
 - a. How to use Publisher, in order to be more productive using the software, and to improve client relations with a more professional offering.
 - b. How to run queries on client database, in order to develop reports of client profitability and loyalty. That way, the firm can devise ways to focus on its most profitable clients and have them be even more loyal. It can also identify opportunities to offer additional services to clients.
 - c. How to use graphics in PowerPoint, including off-the-shelf templates to make presentations more effective.
 - d. How to complete Internet searches more productively – an opportunity that will save expenses on the research service.
 - e. How to use advanced features of Word for writing and formatting legal briefs.
3. Implement a regular maintenance schedule to increase efficiency of the network and decrease costs:
 - a. Install best-of-breed, convenient backup solution, and set backup schedule.
 - b. Update virus protection, and schedule regular scans and upgrades.
 - c. Clean up files and directories.
 - d. Defrag hard drives.
 - e. Clean up “spy-ware.”
 - f. Create a policy and procedure to protect system security.
4. Improve the network to be more effective and efficient as follows:
 - a. Test and install wireless connectivity in office. Remove old cabling.
 - b. Make printers available to all workstations.
 - c. Purchase additional, faster printers – at the same price as current, slower printers. New printers will have onsite support contract.
 - d. Install upgraded networking software on server and workstations, to increase efficiency of the system.
 - e. Test, run, and debug the network so that it runs at optimal speed and performance.
 - f. Install broadband Internet access.

5. Develop a low-cost Intranet to connect the new office with the central office, and to allow employees to collaborate and coordinate more effectively than is currently possible. Eventually the firm can migrate to electronic client records, sharable over the Intranet.
6. Test web-based teleconferences for remote clients and employees, in order to save travel costs, reduce travel time, and to increase revenues.

Conducted by:

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