## Business Assessment Follow-Up

## Your Business Goals

Based on our previous conversations, our understanding of your business goals is as follows:

### 3-Year Goals

1. Improve team productivity, ability to work better together
2. Update IT infrastructure to more current technologies
3. Grow from $2M annual revenue to $2.5M
4. Improve customer response time

### 3-Year Goal Adjustments

1. Update, optimize, and standardize employee PCs for better performance
2. Train employees on latest Office applications to enable them to respond to team members and customers in more timely manner
3. Replace existing server with new

### 5-Year Goals

1. Improve customer tracking, work toward more repeat business and increase existing customer business
2. Grow business via acquisition

### 5-Year Goal Adjustments

1. Implement some level of customer relationship management
2. Plan for acquisition integration

## Our Recommendations

Based on your current IT infrastructure and your needs, both immediate and long-term, we recommend the following IT infrastructure for your business. This recommendation is designed for your needs today with a margin of expected growth built in. It also accounts for your growth projections, although additional incremental products may be necessary over the course of time. We anticipate that this technology stack will result in complete satisfaction for you, your employees, and your customers.

We appreciate your partnership and look forward to working closely with you in the future!

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| --- | --- | --- | --- |
|  | ***Make*** | ***Model*** | ***Qty*** |
| ***Upgraded desktop PCs*** | Server Werkz | All | 6 |
| ***Reason / Value*** | Upgrade all desktops to Windows 10 for better security and manageabilityUpgrade all desktops to Office365 E3 for better team and individual productivity |
| ***Upgraded laptop PCs*** | Server Werkz | All | 2 |
| ***Reason / Value*** | Upgrade all laptops to Windows 10 for better security and manageabilityUpgrade all laptops to Office365 E3 for better team and individual productivity |
| ***New server*** | Lenovo | RD550 | 2 |
| ***Additional Features*** | See proposal spec |  |  |
| ***Reason / Value*** | Replacing single entry-level server with redundant failover servers, moving to virtual environment for business continuity, performance, and future growth |
| ***Firewall / UTM*** | Sophos | SG1BTCHUS | 1 |
| ***Reason / Value*** | Comprehensive network security, better manageability, close ties with anti-virus for integrated protection |
| ***Switch*** | Netgear | XSM4324S | 1 |
| ***Reason / Value*** | Adding 10GbE for moderate virtualization use and future growth |
| ***Switch*** | Netgear | GS728TXP | 1 |
| ***Reason / Value*** | Adding Power-over-Ethernet for future growth and replacing older switch with more ports and better manageability |
| ***Storage*** | Lenovo | N4610 SAN | 1 |
| ***Additional Features*** | See proposal spec |  |  |
| ***Reason / Value*** | Adding storage for virtual environment, adds simplified business continuity, higher performance, and simplified growth |
| ***Anti-virus software*** | Sophos | Endpoint Protection | 8 |
| ***Reason / Value*** | Improved security and manageability, faster response to malware |
| ***LoB software*** | Microsoft | Office365 E3 | 8 |
| ***Reason / Value*** | Improved individual and team productivity, substantially improved legal compliance, improved customer communications |