## Server Werkz

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## www.serverwerkz.com

Technology Assessment Checklist

For Small Business

## A quick way to help your small-business customers get the best technology.

Today's small-business owners want reliable technology that helps them do their jobs quickly and effectively. But they also want to keep it simple. And that's where this checklist can help. It provides three simple steps to help you better understand the technology needs of your small-business customers.

## How to use this checklist:

We encourage you to work one-on-one with your customers to complete the checklist. Alternately, your

customers can complete step one on their own, and return the list to you to discuss steps two and three.

## Three steps to your easiest technology implementation:

1. The Assessment
2. The Dialogue
3. The Recommendation

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# Step 1: The Assessment

## Big picture goals – what business pain points do you want to address?

Limited team productivity; want to improve customer response time and have faster turnaround on customer requests; want to add secure customer-friendly wireless; possible merger/acquisition with slightly smaller firm

## What are your current technology challenges?

File-sharing is cumbersome; email is slow; server is slow to respond

## Current IT infrastructure – what is in place right now?

See assessment below

### Daily usage

What e-mail do you currently use? G-mail No Hotmail/Outlook.com No

ISP-provided No On-site e-mail server Yes Other NA

Do you have a web site? No Is it up-to-date/updated regularly? NA

Who hosts the web site? NA

### Computers

***Desktop PCs*** 5 total units; 0 are off-site

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Make | Model | RAM | CPU speed | Hard drive size | OS |
| SW | DT410 | 8GB | 5th Gen Core i5 | 1 TB | Windows 8.1 Pro |
| SW | DT310 | 8GB | 4th Gen Core i5 | 500GB | Windows 7 Pro |
| SW | DT410 | 8GB | 5th Gen Core i5 | 1 TB | Windows 8.1 Pro |
| SW | DT310 | 8GB | 4th Gen Core i5 | 1 TB | Windows 8.1 Pro |
| SW | DT210 | 4GB | 3rd Gen Core i5 | 1 TB | Windows 8.1 Pro |
| SW | DT510 | 8GB | 6th Gen Core i5 | 1 TB | Windows 8.1 Pro |

***Laptop PCs*** 2 total units; 0 are off-site or mobile

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Make | Model | RAM | CPU speed | Hard drive size | OS |
| SW | LT210 | 4GB | 3rd Gen Core i5 | 500GB | Windows 7 Pro |
| SW | LT420 | 8GB | 4th Gen Core i7 | 240GB SSD | Windows 8.1 Pro |

***Smartphones/tablets*** 7 total units; 7 are off-site or mobile

|  |  |  |  |
| --- | --- | --- | --- |
| Make | Model | Connectivity (Cell, WiFi) | Carrier |
| Apple | iPhone 6 | Cell & WiFi | Verizon |
| Apple | iPhone 6s | Cell & WiFi | Verizon |
| Samsung | Edge 6 | Cell & WiFi | T-Mobile |
| Nokia | Lumia 925 | Cell & WiFi | T-Mobile |
| Apple | iPhone 6 | Cell & WiFi | Verizon |
| Apple | iPhone 6 | Cell & WiFi | Verizon |
| Apple | iPhone 6 | Cell & WiFi | Verizon |

***Servers*** Enter Qty total units

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Make | Model | RAM | # of CPUs | CPU speed | # of HDD | HDD size | NOS |
| SW | TS3250 | 4GB | 2 | Xeon 5520 | 6 | 1 TB each | SBS 2008 |

Pedestal 1 1U Enter Qty 2U Enter Qty Other Enter Qty

### Software

***Microsoft Desktop***

Office 2000 0 Office 2003 0 Office 2007 0 Office 2010 5 Office 2013 2 Project 0 Visio 0

***Microsoft Server***

Exchange Server 1 Which version? 2007 (part of SBS 2008)

SQL Server 0 Which version? NA

SharePoint Server 1 Which version? SPS 3.0 (part of SBS 2008)

Office Communications Server / Lync Server 0 Which version? NA

CRM 0 Which version? NA

***Third-party***

QuickBooks 7 Which version? 2014

Other accounting Lacerte Accounting Make and version? 2014

Line-of-business Enter Qty Make and version? Enter Make and Version

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Line-of-business Enter Qty Make and version? Enter Make and Version

### Peripherals

***Printers*** 3 total units

Ink-jet 0 Ink-jet AiO 0 Laser 1 Laser AiO 0

Color laser 1 Color laser 1

***Scanners*** 2 total units

Flat-bed 0 Document 1

***Other***

Type Enter Type Make Enter Vendor Model Enter Model Number

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### Network Connectivity

What is the name of your ISP? Verizon FIOS

What type of connection do you currently use? Dial-up No DSL No

Cable No High-speed cable Yes

***Networking Hardware***

Router – ISP provided? Yes Switches 1 How many ports? 16

Speed? 10/100/1000 Wireless router Yes

### Network Design

Peer-to-peer (PCs connected without a server) No Server-based Yes

Do you currently have remote access? Yes Do you want remote access? Yes

### Storage and Back-up

Do you currently use data storage other than local PCs or server? No

If so, what kind? NAS Yes USB hard drive No Other No

Do you currently have a data back-up system in place? Yes

If so, what kind? NAS Yes USB hard drive No Tape drive No Other No

Back-up software make and version? StorageCraft Shadow Protect 10

## IT Inventory complete – Thank You!

A conversation with your customer—and asking the right questions—can help you to grow and strengthen your customer relationship. This dialogue also ensures that your customer is getting the most out of your technology and service recommendations.

What employee growth do you expect to see in your company over the next 5 years? 10-15 % increase

Sales 1 Marketing 1 Accounting 4 Other 1

What customer growth do you expect to see in your business over the next 5 years? 25-35% increase

Do you see your business growing in any new directions over the next 5 years? No

If so, what new business processes to you expect with that growth? Want to add some level of customer tracking/CRM; expect to need to have at least one power-user

What revenue growth do you expect to see over the next 5 years? $500,000.

What new capabilities are you specifically looking to add to your workforce right now? Better communication, easier information sharing

## Business Assessment complete – Thank You!