## VAR Company Name

## VAR Company Address

## VAR Company City, State, ZIP

## VAR Company URL

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

Date:5/31/2013

Company:Enter customer company name

Contact:Customer contact name

Phone:Enter customer phone number

e-mail:Enter customer contact e-mail here

# Step 1: The Assessment

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

Enter customer pain points here

## What are your current technology challenges?

Enter current technology issues here

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

### Daily usage

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

ISP-provided Yes or No On-site e-mail server Yes or No Other Description

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

Who hosts the web site? Enter name of ISP here

### Computers

***Desktop PCs*** Enter Qty total units; Enter Qty are off-site

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Make | Model | RAM | CPU speed | Hard drive size | OS |
|  |  |  |  |  |  |
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***Laptop PCs*** Enter Qty total units; Enter Qty are off-site or mobile

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Make | Model | RAM | CPU speed | Hard drive size | OS |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

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

|  |  |  |  |
| --- | --- | --- | --- |
| Make | Model | Connectivity (Cell, WiFi) | Carrier |
|  |  |  |  |
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|  |  |  |  |

***Servers*** Enter Qty total units

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Make | Model | RAM | # of CPUs | CPU speed | # of HDD | HDD size | NOS |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |

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

### Software

***Microsoft Desktop***

Office 2000 Enter Qty Office 2003 Enter Qty Office 2007 Enter Qty Office 2010 Enter Qty Office 2013 Enter Qty Project Enter Qty Visio Enter Qty

***Microsoft Server***

Exchange Server Enter Qty Which version? Enter Version

SQL Server Enter Qty Which version? Enter Version

SharePoint Server Enter Qty Which version? Enter Version

Office Communications Server / Lync Server Enter Qty Which version? Enter Version

CRM Enter Qty Which version? Enter Version

***Third-party***

QuickBooks Enter Qty Which version? Enter Version

Other accounting Enter Qty Make and version? Enter Make and Version

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

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

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

### Peripherals

***Printers*** Enter Qty total units

Ink-jet Enter Qty Ink-jet AiO Enter Qty Laser Enter Qty Laser AiO Enter Qty

Color laser Enter Qty Color laser Enter Qty

***Scanners*** Enter Qty total units

Flat-bed Enter Qty Document Enter Qty

***Other***

Type Enter Type Make Enter Vendor Model Enter Model Number

Type Enter Type Make Enter Vendor Model Enter Model Number

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Type Enter Type Make Enter Vendor Model Enter Model Number

### Network Connectivity

What is the name of your ISP? Enter ISP name

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

Cable Yes or No High-speed cable Yes or No

***Networking Hardware***

Router – ISP provided? Yes or No Switches Enter Qty How many ports? Enter port count

Speed? 10/100: 10/100/1000: 10G Wireless router Yes or No

### Network Design

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

Do you currently have remote access? Yes or No Do you want remote access? Yes or No

### Storage and Back-up

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

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

Do you currently have a data back-up system in place? Yes or No

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

Back-up software make and version? Enter vendor name and software version

## 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? Enter +/- increase

Sales Enter Qty Marketing Enter Qty Accounting Enter Qty Other Enter Qty

What customer growth do you expect to see in your business over the next 5 years? Enter +/- increase

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

If so, what new business processes to you expect with that growth? Enter customer expectations – note: expect to have to assist customer in translating any new duties, needs, etc. into business processes

What revenue growth do you expect to see over the next 5 years? $ Dollar amount

What new capabilities are you specifically looking to add to your workforce right now?  Enter new capability info here; include customer reasons for addition, as well

## Business Assessment complete – Thank You!