

Technology Roadmap

Questionnaire

For

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Technology Roadmap

Questionnaire

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Company Information

1. Legal Business Name: _____
2. DBA Business Name: _____
3. Primary Contact Name: _____
4. Primary Contact Email: _____
5. Primary Location: _____

6. Other Locations: _____

7. Years in Business: _____
8. Annual Sales: _____
9. Services/Products Provided: _____

10. Who are your clients? _____

11. How do you market your products and your services? _____

12. How do you get new clients? _____

13. Who does your company exchange information with regularly? (e.g., vendors, customers, partners, suppliers)

14. How long has company been around? _____

- Where did it start? _____

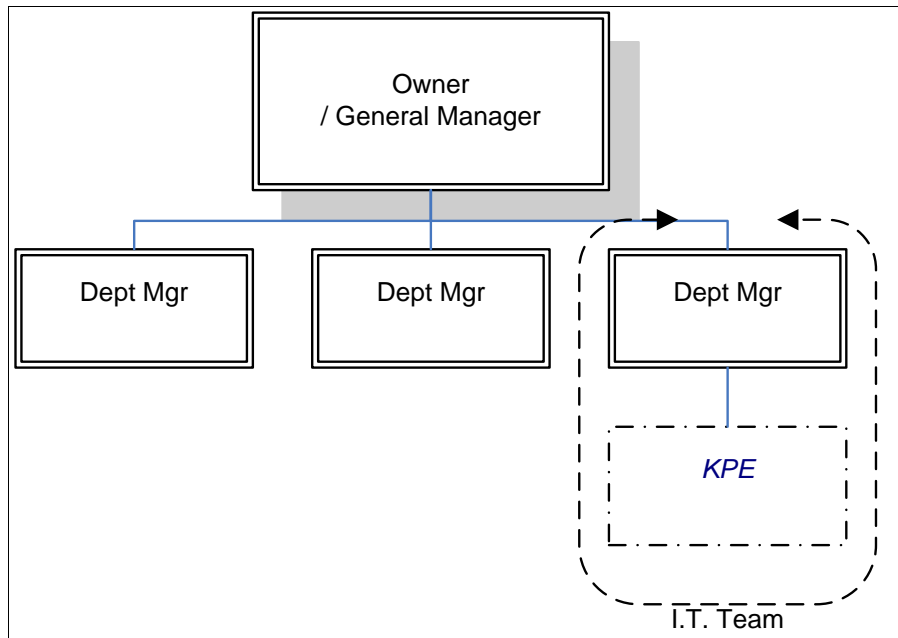
- Who was there? _____

- Who's still here? _____

15. Organizational Chart.

Please provide a diagram of the key departments/functions and identify key roles and personnel.

Sample:



Organizational Chart:

Company Information (cont.)

16. What is the company mission statement? _____

17. What are your key business goals for the next 12 months? _____

18. Where would you like your business to be in 3-to-5 years? _____

19. What obstacles have to be overcome to achieve those goals? _____

It's OK if you do not have some (or any) of these items but if you do please write them in detail.

20. Is there a formal, written, and current Business Plan? Y / N

21. Describe the company culture if possible

22. What is the company Motto _____

23. What do you believe your clients, overall, think of your company and people?

24. What do you believe your employees, overall, think of your company?

Growth – Employees and Technology

1. How many employees do you have currently? _____
2. How many “computer users” do you expect to have
 - One year from now _____
 - Three years from now _____
 - Five years from now _____
3. How many desktop computers do you have currently? _____
4. How many laptop computers do you have currently? _____
5. How many servers do you have currently? _____

Technology Overview

1. Do you view technology as an
 - _____ Asset
 - _____ Expense
 - _____ Necessary Evil
 - _____ Just plain evil?
2. How much downtime do you average per month . . .
 - On your most important systems? _____
 - Companywide? _____
3. Does downtime cause enough of an impact on your business that you're willing to invest in preventing it?
4. Who is responsible for technology support within your organization? _____

- 5. Have there been any changes in the past 12 months that affect technology demands?

- 6. Are there any upcoming changes that will increase or decrease the dependence on technology?

- 7. What are the three largest pain points in your business? _____

- 8. What technology features or functions get you excited? _____

- 9. What frustrates you the most regarding technology? _____

- 10. What problems, challenges or nagging business issues should technology be able to help alleviate?

Technology Spending

- 1. What is the annual cost to support your IT infrastructure? _____
- 2. Do you have a technology budget? **Y / N**
- 3. Does supporting your infrastructure cost more than you are comfortable with spending? **Y / N**
- 4. How do you currently determine the amount you are able to spend on technology?

- 5. Define the steps you take when buying IT products and services. _____

-
- 6. Who makes the final purchasing decision? _____

 - 7. Do you work from an RFP or from vendor proposals? _____

Regulatory, Compliance, and Security Issues

- 1. What Regulatory or Compliance Issues do you face relating to your industry?

- 2. Do you know of any areas you currently are not in compliance with regarding GDPR, state privacy laws, Sarbanes-Oxley, HIPAA, PCI, or other compliance rules?

- 3. What is the timeline to comply? _____
- 4. Do you have a written compliance policy? _____
- 5. How often is it reviewed and when was the last time? _____

- 6. Do you have a process for maintaining compliance? _____

- 7. Have you ever experienced a cryptovirus attack? If so, tell me about it

- 8. Have you ever experienced other virus attacks? If so, tell me about it

Major Operations

This section is for important notes about major servers, desktop operations, and general technology operation in your organization. The goal of this section is to make sure we identify the most important technologies in your organization.

1. Describe your major Servers and their functions. (e.g., file server) _____

2. Exchange / Email Server _____
3. SQL Server _____
4. SharePoint Server _____
5. Desktop Operating Systems _____
6. Office Suites / Versions: _____
7. Do you have an IT lifecycle management plan or policy
8. Where are these resources located?

Onsite

Cloud

Other/DK

Email

File Storage

Anti-Virus

Spam Filter

Remote Monitoring

Patch Management

Backup

9. Where so you expect these resources to be located in 3-5 years?

Onsite Cloud Other/DK

Email

File Storage

Anti-Virus

Spam Filter

Remote Monitoring

Patch Management

Backup

10. What do you use as a CRM (customer relationship management) tool or primary line of business software to run your company?

SWOT

The SWOT Analysis is an effective way of identifying your **Strengths** and **Weaknesses**, and of examining the **Opportunities** and **Threats** your organization faces. The analysis will help you build on your strengths, minimize weaknesses, and take the greatest possible advantage of opportunities available.

Strengths and Weaknesses are internal factors.
Opportunities and Threats are external factors.

Strengths:

1. What advantages does your business have compared to competitors? _____

-
2. What does your business do well? _____

 3. What resources are available for you to leverage? (finances/partners/suppliers/staff)

 4. Why do customers choose your business over others? _____

Weaknesses:

1. What disadvantages does your business have compared to competitors? _____

2. In what areas can your business improve? _____

3. Could any of your weaknesses seriously threaten your business? _____

Opportunities:

1. How do you find or identify business opportunities? _____

2. What are the positive opportunities facing your business? _____

3. What are the dominant trends in your industry? _____

4. Are there changes in technology that can enhance your position in the market?

Threats:

1. What obstacles does your business face? _____

2. Who do you consider as your major competition and what are they doing differently than your current business model?

3. Are there new industry trends or changes coming for your business, products or services?

Other

Is there anything else we should know? _____

Questionnaire to Leave Behind:

In-House Programs and Systems

Does your company have a **formal and written**:

Employee Hiring Process	Y / N
Employee Review Process	Y / N
Employee Onboarding Process	Y / N
Employee Exit Process	Y / N
Employee Training Program	Y / N
Accounting Operations Manual	Y / N
Standards and Procedures Manual	Y / N
Best Practices Document or Guide	Y / N
Policies Manual for the Company	Y / N
Security and compliance documents	
<ul style="list-style-type: none"> Is your company SOX compliant? 	Y / N
<ul style="list-style-type: none"> Is your company HIPAA compliant? 	Y / N
<ul style="list-style-type: none"> Is your company PCI compliant? 	Y / N
Sales Operations Manual	Y / N
Marketing Operations Manual	Y / N
Clear definition of the perfect client	Y / N
Client Onboarding Process?	Y / N
Client Exit Process?	Y / N
Client Training Program?	Y / N