ANNUAL TECHNOLOGY ASSESSMENT

Elements to consider when planning and performing a yearly technology review

CHECKLIST

PLANNING STEPS

TASKS

✓	Determine organization stakeholders to invite
✓	Determine outsource partner representatives to invite
✓	Determine date and location for meeting
✓	Finalize meeting agenda
✓	Send meeting invitations and agenda
✓	Confirm attendees

COMMON KPIS

EXAMPLES

✓	Total service tickets resolved
✓	Average service tickets resolved per day
✓	SLA service response compliance rate
✓	Average ticket resolution time
✓	Unplanned downtime incidents
✓	Average length of unplanned outages
✓	Tickets logged per platform/technology/solution

DISCUSSIONS

TOPICS

✓	Progress completed for significant milestones set the previous year
✓	IT performance versus expectations
✓	Technology capabilities versus expectations
✓	Newfound technology gaps
✓	New potential technology-enabled opportunities
✓	Asset (software, hardware and services) lifecycle evaluation and review
✓	Cybersecurity status
✓	Business continuity and disaster preparedness status

REPORTS

SUBJECTS

✓	Service ticket-by-service/support type totals
✓	Service Level Agreement (SLA)/service guarantee performance
✓	Specific service type breakdowns (new user request, outage resolution, email assistance. etc.)
✓	Project status
✓	Expense (budget versus actual) reports
✓	IT system and solution mappings to corresponding business needs and objectives
✓	Actual versus contracted usage (for any outsourced IT services)
✓	Outsourced IT services ROI
✓	In-house managed IT services and investments ROI
✓	Hardware and software lifecycle reports
✓	Contracted services lifecycle reports
✓	Cybersecurity evaluation
✓	Industry and regulatory compliance evaluation
✓	IT policies and procedures status versus organizational needs
✓	Business continuity and disaster plan preparedness evaluation
✓	Overall IT performance and spend comparisons versus comparable organizations

FOLLOW UP STEPS

TASKS

✓	Determine stakeholders to attend best-practices gap meeting
✓	Schedule meetings to address best-practices gaps
✓	Confirm milestones for addressing best-practices gaps and assign responsibilities
✓	Determine stakeholders to attend newfound opportunities meeting
✓	Schedule meetings to address newfound opportunities
✓	Confirm milestones for newfound opportunities and assign responsibilities
✓	Determine stakeholders to attend new business needs meeting
✓	Schedule meetings to address new business needs
✓	Confirm milestones for new business needs and assign responsibilities