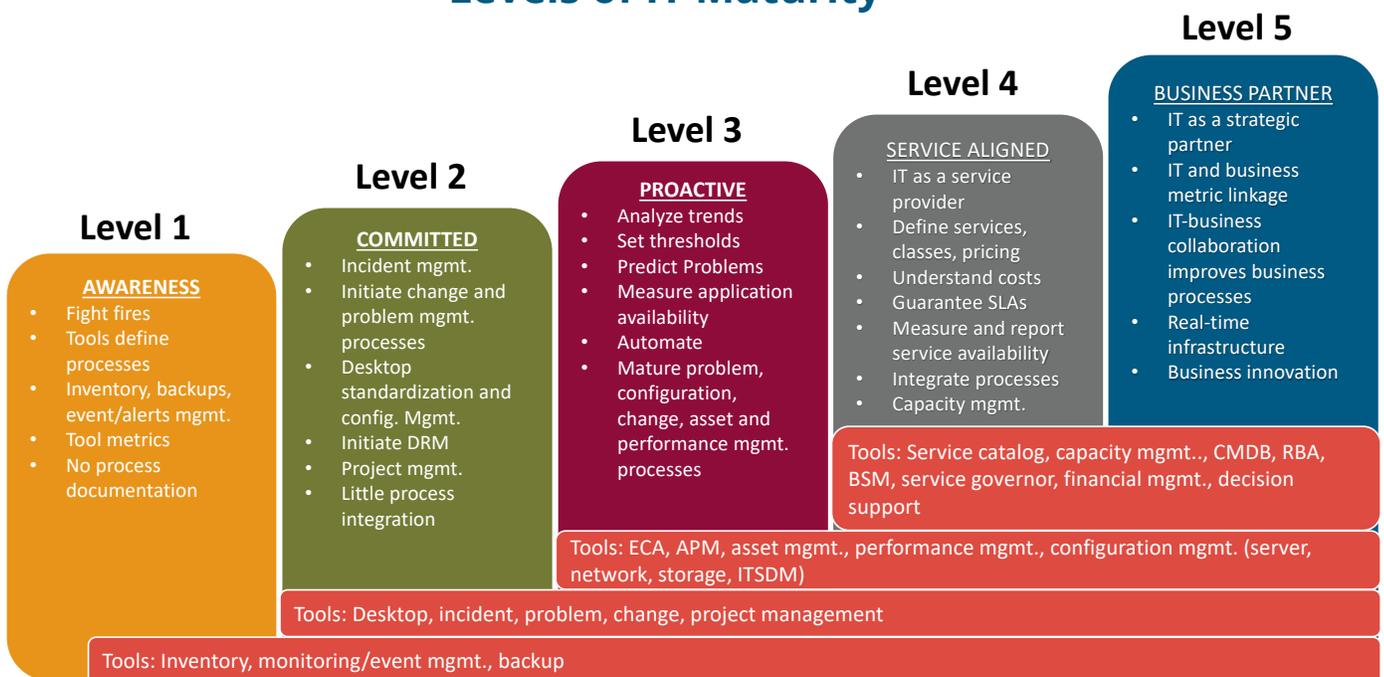# MRE Insights

Assessments: A Necessary Pain

Most companies balk at the idea of having a third-party vendor visit their organization to analyze their infrastructure. While leadership might have a vested interest in IT, it is generally the furthest thing from their mind. And while others may want to invest more in IT, they are often challenged with budget constraints to keep the business running instead of driving IT initiatives. Taking the first step to solve any challenge can be daunting, but by following a simple guideline you can help your organization perform a step-by-step analysis to identity the critical parts of your environment and achieve a steady state.

It can be painful to see gaps in an IT environment and to recognize the cost and effort to correct it. To keep this a short read, we will focus on raising awareness for IT leadership and reducing the fear of unknowns within your IT environment. Subsequent articles will build upon this one to give you a clear understanding of our step-by-step guideline.

Whether you want to start an assessment internally or use a third party, you need to establish objectives. Ultimately, what do you expect to gain from conducting an assessment? A good starting point is understanding the levels of maturity of IT Operations Management and then focusing on improvements (see figure below). At **Level 1: Awareness**, you find yourself focusing on immediate issues, applying the same fixes over and over without truly resolving the problems. All you are doing is putting out fires without proper tools and processes, that are not aligned with the business.

IT Operations Management Success
Levels of IT Maturity

Level 1

AWARENESS
- Fight fires
- Tools define processes
- Inventory, backups, event/alerts mgmt.
- Tool metrics
- No process documentation

Level 2

COMMITTED
- Incident mgmt.
- Initiate change and problem mgmt. processes
- Desktop standardization and config. Mgmt.
- Initiate DRM
- Project mgmt.
- Little process integration

Level 3

PROACTIVE
- Analyze trends
- Set thresholds
- Predict Problems
- Measure application availability
- Automate
- Mature problem, configuration, change, asset and performance mgmt. processes

Level 4

SERVICE ALIGNED
- IT as a service provider
- Define services, classes, pricing
- Understand costs
- Guarantee SLAs
- Measure and report service availability
- Integrate processes
- Capacity mgmt.

Level 5

BUSINESS PARTNER
- IT as a strategic partner
- IT and business metric linkage
- IT-business collaboration improves business processes
- Real-time infrastructure
- Business innovation

Tools: Service catalog, capacity mgmt.., CMDB, RBA, BSM, service governor, financial mgmt., decision support

Tools: ECA, APM, asset mgmt., performance mgmt., configuration mgmt. (server, network, storage, ITSDM)

Tools: Desktop, incident, problem, change, project management

Tools: Inventory, monitoring/event mgmt., backup

LEVEL 1: AWARENESS

The first step is understanding your as-is state. This will serve as the foundation for setting goals and objectives for the assessment. Before you reach out to a third-party, you should conduct your own data collection session. Below is a simple approach to gaining awareness into the organization's IT Operations. Please note that this is meant to be a guide and is in no way an absolute for every environment.

I. Start with objectives in mind
Begin a conversation with IT leadership and key stakeholders about the overall objectives.

    1. List the top two objectives. For example:
        a) Improve the level of success by increasing operationally maturity.
        - This works best when you quantify efforts. For example: 'the company will decrease (item) by x% by y (time frame)
        b) Reduce the amount of IT overhead and inefficiencies
        c) Reduce the amount of downtime and improve IT functionality
    2. Focus on the facts and deliver the anticipated approach of completing the assessment
        a) Discuss recent incidents that were impactful to the organization
        b) Discuss the anticipated approach with peers within the chain of command to gain support and buy-in before presenting to IT leadership
        c) Follow a high-level strategy that will include points from the following:
            1) Assessment
            2) Stop Gap
            3) Remediation

II. List the company's top 3 IT pain points
This may start as a long list so do your best to prioritize based on business needs. For example:
    1. Emails sent and received are inconsistent and user are reporting missing important emails
    2. There is a server that you must reboot every Thursday for no apparent reason
    3. The Engineer is spending weekends filtering through log files to find out who changed the rights to the HR folder and now everyone has access

III. Start with a clean slate
Do a data export of your ticketing system for the past 6-months to identify top incidents and service requests (we will expand on this in subsequent articles). Then, analyze and identify trends or repeat problems from your users.
    1. Be consistent when differentiating incidents from service requests. Learn more about this topic here: http://itiltopia.com/?p=1202
    2. For monitoring tools (Solarwinids, SysAid, etc.), use built in tools and apply the same principle to recognize top incidents and service requests

IV. Create an inventory of IT tools at your disposal
Unless you are an extremely lucky person that got all your IT tools for free, it is very likely that you have spent a large amount of money on software licenses and tools.

1. Monitoring and alerting software
2. Computer deployment software
3. Remote management software
4. Backup software
5. Document repository
6. File sharing and collaboration utilities
7. Meeting and video conference tools
8. Any other tools regulated as an IT tool

V. Implement a consolidation strategy
List all processes and procedures currently in use and build a roadmap for consolidation. This will not only result in the desired performance levels, but you will experience efficiency as you grow your business.

1. Network Security Policy
2. Password Policy
3. Change Management Policy
4. User Acceptable Use Policy
5. BYOD Policy
6. Backup and Data Retention Policy

VI. Know your IT budget
IT is central to business results and the scope and allocation of an IT budget is complex, primarily because not all IT spending falls within the IT department. Your IT leadership should have holistic view of technology costs regardless of where they reside. This ensures that there are no redundancies between the centralized IT budget and other business unit budgets, thereby keeping overall IT spending lean and in check.

In conclusion, laying the groundwork for conducting an assessment to establish a good base or current state data point is critical in moving organizational IT forward. An IT assessment will help all parties involved gain the knowledge required to make stronger business decisions, establish goals, plan for change, and help keep the attention on successful technology initiatives. Our next blog will focus on the infrastructure and how to conduct an infrastructure assessment.

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Demetrius is a ITIL v3 certified professional and respected IT leader with over 20 years of experience in the industry. With the ability to develop, execute, and manage different computing and IT strategies of an organization, he specializes in analyzing, engineering and implementing IT solutions based on an ITIL standard for organizations. Demetrius' current focus is on the vCIO practice helping businesses pair technology with business initiatives using enterprise level tools, software, hardware and analytics.

Visit **mre-consulting.com.** if you have any questions or concerns regarding your IT infrastructure.