IT Assessment Worksheet

Client Address:

Contact Name: Phone Number: ( ) -
Company:
Address:
City: Province/State: Postal Code/ZIP:

Installation Address:

Contact Name: Phone Number: ( ) -
Company (If different from above):
Address (If different from above):
City: Province/State: Postal Code/ZIP:

Client Contacts Identification:

Principal Client Contact

Contact Name:
Phone Number: ( ) -
Mobile Phone Number: (-
Fax Number: ( ) -
Email:
)

Technical Client Contact

Name:
Phone Number: ( ) -
Mobile Phone Number: (-
Fax Number: ( ) -
Email:
)

Requested Install Date:

Date: Urgent?: ☐ Yes ☐ No

Brief Project Description:

Please insert some information about your company, as well as some general information about the current project.

Business Needs Analysis

The following is a list of relevant questions that will help us to understand how your organization leverages IT to support your corporate objectives.

1. What departments are major users of IT services?
    a. Administration
    b. Finance
    c. Operations
    d. Sales
    e. Marketing
    f. Engineering
    g. Customer/Technical Support
    h. Shipping/Receiving
2. For each department listed above, please define the operational workflow – specifying how and where IT supports the activities of the team
3. For each department listed above, please define:
    a. The number of people in the department
    b. The anticipated number of people in the department in 12 months
    c. The IT applications in use

Department	Headcount	Planned Headcount	Applications
Administration			
Finance			
Operations			
Sales			
Marketing			
Engineering			
Customer/Technical Support			
Shipping/Receiving			

4. How many sites (locations) does your organization have that make use of IT? (Remote or mobile users count as individual sites)

IT Needs Assessment

This list of questions should be presented to *each* key user (individually or as a group), understanding that different groups use the systems in different ways.

1. What are the primary *business services* that are provided/supported by IT in prioritized order?
    a. Email
    b. Internet access
    c. Desktop resources
    d. CRM

2. What are the primary business services that the business would *like* IT to provide (over and above the existing services)?

3. For each of the defined services what do you believe to be the impact (cost) of downtime to your business ($/hr or downtime)
    a. Email
    b. Internet access
    c. Desktop resources
    d. CRM

4. Please order the following attributes of the network and business services with **1 being the most important and 10 being the least important**
    a. Available (in spite of failures)
    a. Reliable (infrequent failures or bugs)
    b. Robust/Recoverable (recovers from failure or disaster)
    c. Supportable (broad industry support)
    d. Usable (user friendly)
    e. Secure/Compliant
    f. Performance
    g. Features
    h. Cost effective
    i. Scalable (will grow with you)

5. For each above defined site, please define the headcount in each department resident at that site

Site Department	Site 1	Site 2	Site 3
Administration			
Finance			
Operations			
Sales			
Marketing			
Engineering			
Customer/Technical Support			
Shipping/Receiving			

6. Please list the business processes (workflow) used within your organization

7. Please select the statement that best reflects the businesses disaster recovery plans (DRP):

   a. There is no disaster recovery plan of any type

   b. The DRP is limited to data backup and recovery

   c. A preliminary DRP has been drafted, but it has never been tested

   d. A robust DRP is in place, it is tested periodically and has been reviewed and improved based on test feedback

8. Please select the statement that best reflects the backup strategy:

   a. There is no backup strategy

   b. Some data is backed up locally, with little thought as to what data is important

   c. Some data is backed up offsite, with little thought as to what data is important

   d. All critical data is backed up and stored locally

   e. All critical data is backed up and stored locally, test restores are conducted periodically

   f. All critical data is backed up and stored offsite

   g. All critical data is backed up and stored offsite, test restores are conducted periodically

9. For each critical service, please define the recovery time objective (RTO), and indicate whether the current DRP has been tested to achieve the RTO

Business Service	RTO	Accepted
Email	6 hrs	No
Internet access	4 hrs	No
Desktop resources	24 hrs	No
CRM	4 hrs	No

Security and Regulatory Compliance Needs Assessment

1. How confidential do you consider information on your internal network? If you were to rate the information on a scale from one to ten, with ten being the most confidential, what number would you rate your information?

   Please respond here:

   Rating between 1 and 10 (10 being corporate critical, loss or corruption would cause critical business failure).

2. Have you ever conducted any security related audits on your network?

   Please respond here:

   Examples of auditing type work are attack and penetration testing, and internal security threat and vulnerability assessments.

3. Does your company presently have a Security Policy, or an Internet Usage Policy? If so, has it been signed and agreed upon by your employees?

   Please respond here:

   Examples of auditing type work are attack and penetration testing, and internal security threat and vulnerability assessments.

4. Inappropriately configured or legacy security tools can have a large impact on the performance of your network. In any solution chosen, how important on a scale of one to ten, with ten being the most important is performance?

   Please respond here:

   Rating between 1 and 10 (10 being your organization requires as the highest levels of performance.

5. Certain Multimedia applications can stress your available bandwidth, and cause a Quality of Service (QoS) breakdown. Is your organization interested in tools that will help you prioritize bandwidth, so that line utilization is optimized?

   Please respond here:

6. In any security solution chosen, is your organization interested in redundancy?

   Please respond here:

7. Are you planning to install, or do you currently have, any web accessible servers, such as a web, mail, or DNS server? Please fill in the table below with brief detail.

Server Type (Web, Mail, DNS, etc.)	Number of servers Server e-Commerce functions	(online transactions, etc.)

There are potential security issues that should be addressed in allowing Internet users onto corporate machines. The placement of these Internet accessible servers will have an effect on the type of solutions your organization should consider.

8. Do you, or do you plan to offer any ASP (Application Service Provider) or ASP related services to your customers in the future?

   Please respond here:

9. Do you, or is your organization interested in controlling and monitoring access to specific web-sites visited by your employees? If you do, which solution do you implement? Does this solution reflect any relevant policies, such an “Appropriate use of the Internet policy?”

   Please respond here:

10. Do you currently implement, or are you interested in implementing security measures that will protect network users from Viruses, or mobile code, such as Java or ActiveX? If you do implement such a solution, which one do you implement? Does this solution work at the desktop level alone, or are there multiple points of scanning, such as at the Mail server and the Gateway?

    Please respond here:

11. Is your organization using, or are you interested in using solutions that will provide authentication to verify the identity of user accessing a resource? As well, are you using, or are you interested in using measures that will provide non-repudiation of transactions over the internet? If so which solution is your corporation using?

    Please respond here:

12. Do you currently implement a solution that connects your network to another branch location network, or a partner organization network through the use of a Virtual Private Network? If so, which solution do you implement? How many sites, in total, are being connected?

    Please respond here:

13. Do you have a solution that allows your corporate users, while away from the office, to connect securely to internal network resources? Are you interested in such solution?

    Please respond here:

14. When remote users connect to internal network resources, do you apply separate security policies for access on a per user basis, or do you grant a single policy for all access to internal resources? If you are not differentiating users and providing separate policies, are you interested in doing so?

    Please respond here:

15. Do you implement solutions that force users to authenticate while connected to your internal network? If you do not, are you interested in such a solution?

    Please respond here:

16. If you do not already do so, are you interested in having intrusion attempts performed on your network resources? If you are interested, please list the depth upon which you would like to see this service implemented.

    Please respond here:

    Intrusion attempts can take the form of an occasional system sweep conducted by a specific vulnerability detection tool, or a detailed attempt at penetrating into internal network resources. If you are interested, please indicate as to what level you would like to see the Intrusion detection attempts go.

17. Is your organization using measures to detect/prevent Intrusion attempts against your network resources? If you are not, are you interested in such a solution?

    Please respond here:

18. Do you have equipment, or are interested in equipment, that will allow your network Administrators to gracefully power down your critical network resources in the case of a power failure?

    Please respond here:

19. Is your organization interested in VoIP (Voice over IP) services? If so, please provide more details.

    Please respond here:

20. What regulatory compliance legislation is your organization subject to?
    a. HIPAA
    b. Sarbanes-Oxley
    c. Gramm-leach Bliley
    d. PIPEDA

Site Assessment

Server Enviroment

☐ Microsoft NT, _____ ☐ Microsoft 2000 _____ ☐ Microsoft 2003 _____
☐ Novell, _____ ☐ UNIX: _____ ☐ Other: _____

Server Type:
WINS ☐ DHCP ☐ DNS

LAN Environment

LAN protocols used in the protected network:

☐ TCP/IP: Novell IPX ☐ Other:

Do you have a requirement to pass/filter any special protocols? Yes ☐ No ☐

If 'Yes", what are they?

LAN Size:

Total # of devices using IP:

Physical LAN Details:

Ethernet 100 MB ☐ Token-Ring (MB) ☐ Others: