How to Build Your Organization's Technology Roadmap

Quest TECHNOLOGY GROUP

Technology Isn't Just Something That IT Does

The purpose of technology is simple – to discover unexpected opportunities and to solve business problems. With that in mind, a clear, all-in-one-place view of your entire collection of technology assets becomes the foundation on which every other product and service is layered.

Today's strategic leaders are mindful of the need to continually balance risk, innovation, and day-to-day operations with an ever-changing competitive and compliance landscape. They know that their organization's long-term success relies on a responsible technology foundation.

Saying "IT does that" isn't a phrase tech savvy leaders accept.

Building the foundation of the future is a shared, collaborative commitment throughout the organization. It starts with the leadership who is ready to discover the unexpected opportunities.

Where to start?

The purpose of technology is to discover unexpected opportunities and to solve business problems.

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Start By Discovering Where You Are Now

Somewhere, something incredible is waiting to be known.

... Carl Sagan

There is no doubt that technology has never been easier to acquire and messier to manage.

- ☑ Do a quick Google search for "how do I solve x" and the solutions instantly appear.
- ☑ Buy Now and Download Now deliver the tool you need wherever you are.
- ☑ Subscriptions are easy and affordable.
- ☑ When IT doesn't respond as quickly as you would like, the internet puts you in control.
- ☑ Everyone becomes their own ad hoc technology solutions provider.
- ☑ The internet lets everyone feel like they know more than they do.
- ☑ Unknown to users and the IT teams that support them software providers are continually pushing out fixes and enhancements. What worked one way today has changed. Users are confused, and IT is expected to immediately have the solution.
- ☑ The expectations for what IT does are often unrealistic. Technology is complex, and the skills required are increasingly more specialized. Leaders need to become more tech savvy to gain a deeper understanding of the resources needed to support their organization.

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The list goes on.

So how does a strategic-minded leader create the technology foundation their organization needs to succeed? They begin by building a centralized roadmap that everyone in the organization has access to.

The fancy technical term for this is **Technology Asset Management** (or ITAM). But our purpose here is to explore what, why, and how this comes together, not the stuffy tech words. Let's think of this as the discovery that leads to your **opportunity roadmap**. After all, isn't the purpose of technology to discover unexpected opportunities?

Every organization, regardless of size, benefits from gathering all of their technology assets into a centralized collection that everyone in the organization can see.

Small companies have the advantage of building on a scalable foundation.

Large organizations declutter and discover many years of accumulated tools and technologies. No matter how disciplined the decision to acquire an asset was at the time, the foundation looks more like random piles that carefully placed bricks.

Think of it as the "you are here" map marker.

> Your technology asset management discovery creates your organization's "you are here" roadmap.
> It's so much more than just a boring list of technology things you own.
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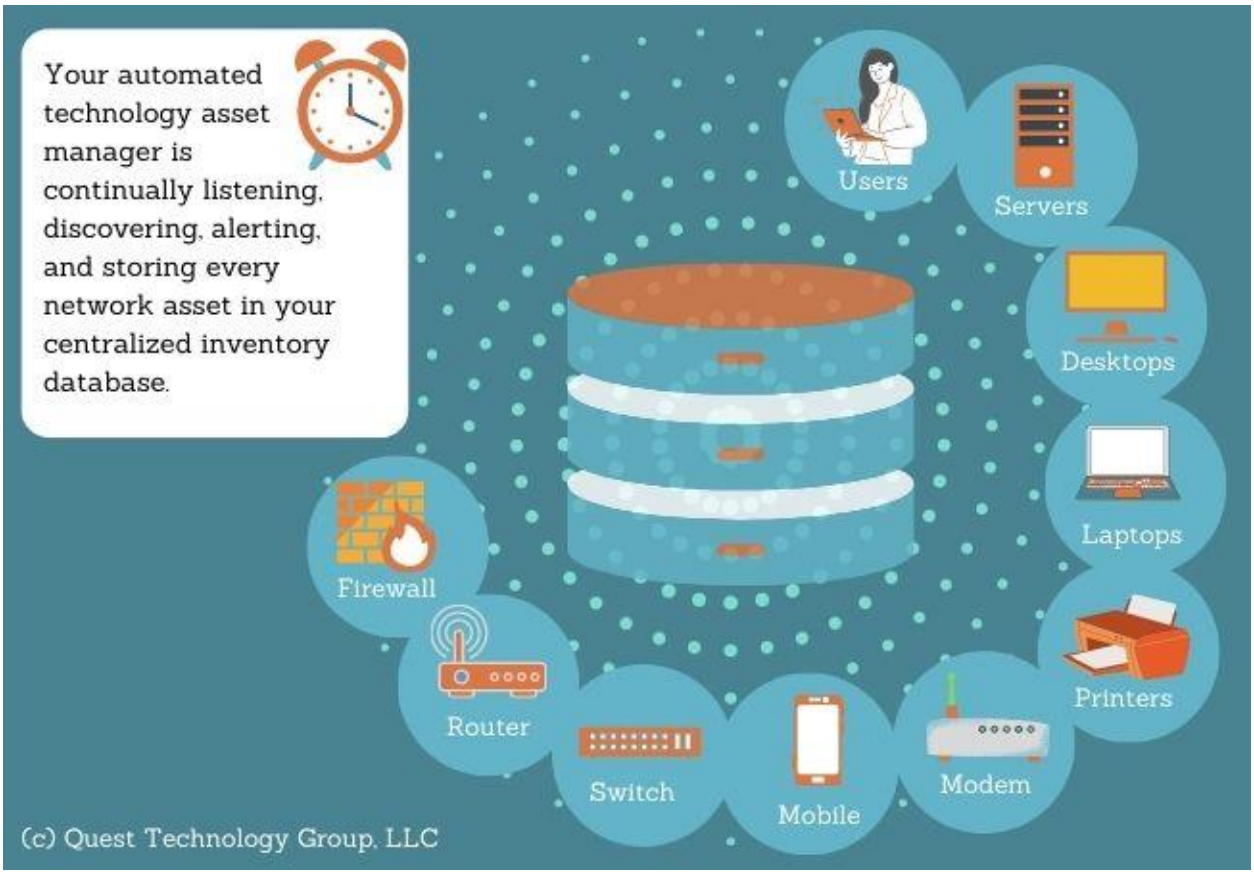
What Will You Discover

Your technology foundation is made up of valuable assets such as software, hardware, mobile devices, virtual machines, containers, and users. All of these pieces should serve a purpose for your organization.

Before you can realistically determine how – or if – each of these are doing their best job for you, you need to know what they are.

Your valuable discovery will identify every asset that is active on your network. This includes devices and users who work from anywhere.



How Does the Discovery Work

The technology discovery uses an automated tool installed on a single server, desktop or laptop on your network. It is an agent-less tool, meaning that nothing is installed on any other network device.

The purpose of the discovery is to identify every user and device with a network connection. A discovery tool that requires an agent to be installed on every device is neither practical nor thorough. It would be unable to detect devices it doesn't know about.

Without going too deeply into the technical details, the discovery tool uses standard network protocols to travel your network. For each device and user found, it records valuable detailed information in a centralized database. This data becomes your organization's **technology asset inventory**.

This asset inventory database will be continually updated by the discovery tool. For this reason, we recommend that the tool remain active on your network. As new users and devices join your network, the discovery tool adds them to the inventory.

Because the tool is always listening for network activity, it is especially valuable in catching unexpected users or devices joining your network. These can often be rogue connections with the potential to spread malware or launch a cyber attack.

> The right technology asset discovery tool is automated and always listening. It frees your IT team from tedious, error-prone manual data collection.
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What About Your Existing Agent-Based Monitoring Tools

This automated discovery tool doesn't replace your existing remote support, proactive monitoring, and security tools. These critical services rely on agents running on known devices. By adding this new layer of network discovery, you reduce the risk of undetected, unmonitored devices gaining access to your company's data.

How Will These New Insights Benefit Everyone in Your Organization

As you dive more deeply into your technology discovery roadmap, everyone in your organization will find valuable ways to use this data every day. Here are just a few examples to kickstart your thinking.

- ☑ Cybersecurity is increasingly becoming something that can't be ignored. "If it happens, we'll restore from backup" is old-school thinking that simply doesn't work. Tech savvy leaders don't accept this casual attitude.

- ☑ The lifespan of technology is becoming shorter, placing a greater emphasis on continual planning, evaluation, budgeting, education, and staffing.

- ☑ IT folks are essential to the day-to-day support of the entire organization. The expectation that anything related to technology can be handled by this valuable team is unrealistic. The skills and expertise required to meet today's technology demands have become more specialized. With specialization, the demands for these team members have increased. Competition and salaries are high.

- ☑ Ongoing technology decision-making should be guided by your existing owned assets. But first you need to know what those owned assets are.

- ☑ The typical ad hoc buying decision is too often reactive. There is an immediate need whether company-wide or a single user. A quick Google search -- rather than an internal asset inventory search-- finds the solution. The purchase is justified with a brief problem-solution-expense discussion. The pattern is rinse and repeat. It doesn't take long before the collection of tools overlaps, resulting in needless spending. Starting with

a single source eliminates tech sprawl.

☑ An up-to-date asset inventory makes proactive technology planning the new norm. CIOs and CFOs who are being directed to do more with less have a valuable resource to make this possible.

☑ The discovery tool continually reports actionable insights tailored to your organization. This information eliminates reactive IT support and lost productivity.

☑ Your IT team has more time to respond to the inevitable issues that require research, learning, and user education.

A Spreadsheet Isn't a Reliable Asset Management Tool

When the IT team is tasked with tracking inventory, they will all too often start with an Excel spreadsheet. They record the servers, desktops, laptops, and software they find. From that point on, maintaining an accurate inventory is a tedious task that rarely is as complete, accurate, and timely as your organization requires.

An automated, always listening and recording asset management tool is the better solution.

- ☑ Everyone in the organization has access to the information they need.
- ☑ Operational costs to maintain a cumbersome manual inventory are eliminated.
- ☑ The data is complete, accurate, and up to date.
- ☑ You can't manage what you don't know exists. Relying on an IT team member to manually inspect devices and develop a thorough snapshot of them is unrealistic.

Accurate License Management Saves Money

Ensuring your organization has the proper number of licenses not only saves money but also prevents penalties for unauthorized software and hardware use. The

discovery records all license keys in a centralized inventory, making an internal review easy.

Reports are tailored to the needs of everyone in the organization. With automated proactive notifications, unlicensed assets are quickly identified. Likewise, underutilized software is an unnecessary expense. Reviewing the need for a piece of software with the intended users allows leaders to stay connected with the day-to-day business needs and to effectively meet them.

Plan and Budget for the Technology Lifecycle

The lifecycle of both hardware and software is decreasing, and organizations need the right information to properly budget for these significant expenses.

The discovery tool accesses several major vendor databases and reports on your warranty status.

A snapshot of software versions and purchase dates is a valuable tool for identifying obsolete software. It's important to remember that out of date software might not be supported by the vendor, exposing your organization to security vulnerabilities.

Small Subscriptions Can Become Big Expenses

Subscriptions are a convenience every company enjoys, but overlooked recurring expenses take a bite out of every budget. Reviewing subscription services on a regular basis with your uses will eliminate unused software. This reduces unnecessary expenses and also removes the risks that neglected software can introduce.

Managing contract renewals allows your organization to proactively review and make responsible decisions. It's important to include in your inventory any subscription cancelation information. Most subscriptions automatically renew unless the required advanced notifications are done.

Reduce Cybersecurity Attack Risks

The increases in data breaches will continue across organizations of all sizes and industries. With the rise in work from anywhere and the ease of acquiring new technology assets, every organization needs to become more aware of the potential risks.

An automated asset discovery tool is the first step in creating a more secure operating landscape. The rich bundle of proactive security tools is essential for each device that touches the organization's data and assets.

In order to install these critical defenses, the organization must first know that the devices exist. You can't safeguard what you don't know exists. An automated discovery that continually identifies and alerts the CIO and IT team of new assets on the network is an invaluable resource.

Managing Shadow IT Is a Big Deal

One of the pitfalls with the ease of acquiring technology is the rise of shadow IT. This is the practice of users acquiring technology outside the organization's accepted approval process.

Employees view crafting their own productivity solutions as a way to be more efficient. They feel more in control of their time and how they work. While their intentions are often good, they don't understand the real security risks these can pose to your company. For example:

- ☑ When an employee creates an app or online account, who is the account owner? Is the account registered in the employee's name instead of the company?
- ☑ Who has access to the account?
- ☑ What do the Terms and Conditions grant to this third party application provider?
- ☑ Does the app or service provide for user access controls? Does the employee know how to do this and why it's important?
- ☑ Has the employee used a strong password that is consistent with your company's password policy?

- ☑ Who has the password other than the employee?
- ☑ What data is being collected, stored, and shared?
- ☑ Is the data backed up by the service provider?
- ☑ Does this app or service integrate (share data with) other company applications or services?
- ☑ When the employee leaves the company, what happens to the application and all the data?

All shadow IT isn't a bad thing. It opens the door for collaboration and solving business problems in unexpected, innovative ways.

Instead of prohibiting the practice, the better solution is to implement a program that allows for new technologies to be suggested, reviewed, and adopted on a company-wide basis.

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- ☑ Employees want to contribute.
- ☑ Employees often see opportunities for efficiency that IT isn't aware of.
- ☑ Breaking down the walls between IT and the rest of the company isn't easy, but it can be done with open communication.

- ☑ Companies will discover the employees who are eager to explore new tools. Everyone doesn't love the research and the time needed to learn. These employees are hidden gems in the company.
- ☑ Make IT exploration part of the company's ongoing technology strategy. The speed of change will only increase, and a living technology plan is essential.
- ☑ Continually assess the company's technology and data investments. These are some of a company's most valuable assets. Technology must always add to and integrate easily with the existing technologies in use.

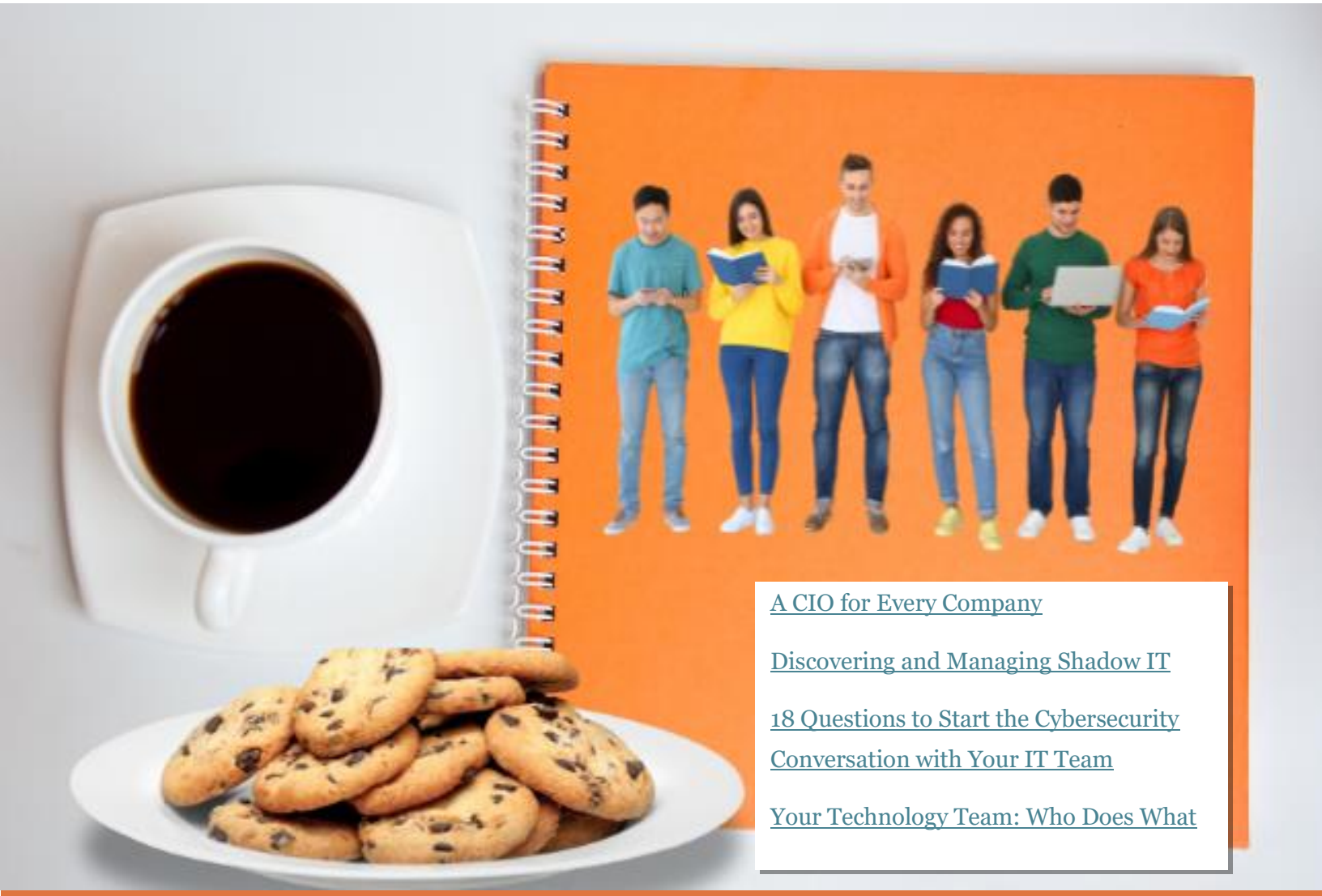
Organizations with an experienced CIO recognize the importance of this collaborative approach. Leaders stay in touch with the day-to-day business needs of everyone in their organization. The technology foundation can be proactively aligned with the changes that invariably occur.

What's Next: Creating Your Opportunity Roadmap

We've just scratched the surface of all a technology roadmap will do for your organization. We know there is a lot to consider. Hopefully, this short introduction has piqued your curiosity.

When you are ready to explore the possibilities, let's talk.

Additional Resources You Might Find Helpful



A CIO for Every Company

Discovering and Managing Shadow IT

18 Questions to Start the Cybersecurity Conversation with Your IT Team

Your Technology Team: Who Does What

Create your technology roadmap. Discover the unexpected opportunities.

- ☑ Do more with less
- ☑ Put your technology investments to work
- ☑ Replace reactive with proactive IT support
- ☑ Reduce operational expenses of manual asset inventories
- ☑ Ensure an up-to-date centralized view of all your technology assets
- ☑ Reduce cybersecurity risks
- ☑ Ensure license compliance
- ☑ Pay only for what you really need
- ☑ Reduce shadow IT risks
- ☑ Build a company-wide collaborative, business-first culture

Got questions?

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