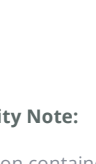


Main Report

Cover Page



Humanize IT Strategic Business Review

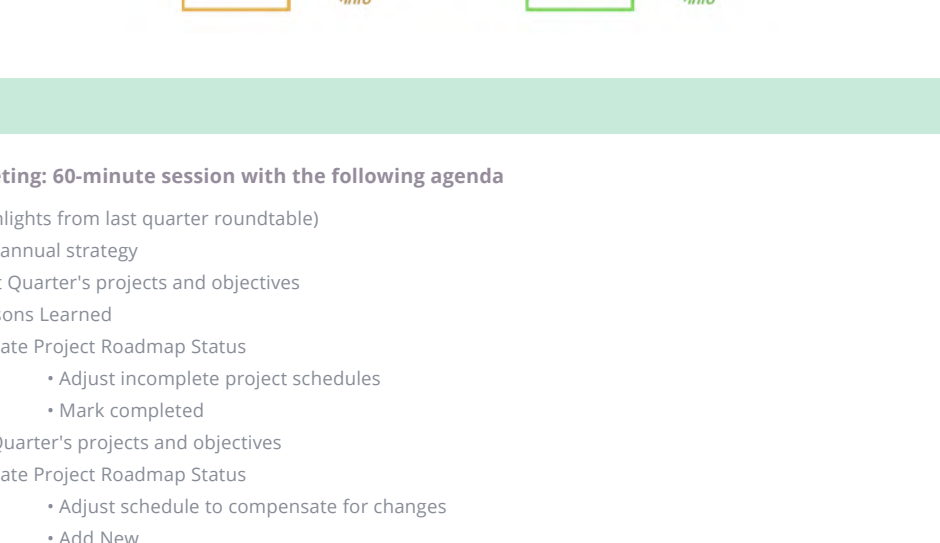
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Quarterly Agenda

QUARTERLY PLANNING PHASE

"No battle plan survives contact with the enemy" - Moltke



Quarterly Cycle

Quarterly Meeting: 60-minute session with the following agenda

- 00: Segue (Highlights from last quarter roundtable)
- 05: Review the annual strategy
- 15: Review Last Quarter's projects and objectives
 - Lessons Learned
 - Update Project Roadmap Status
 - Adjust incomplete project schedules
 - Mark completed
- 30: Plan Next Quarter's projects and objectives
 - Update Project Roadmap Status
 - Adjust schedule to compensate for changes
 - Add New
- 45: Gather consensus (approval) on the adjusted roadmap
 - Mark projects approved
 - Add Notes to discuss next quarter
- 55: Assign action plan to individuals
- 60: Conclude

Meeting Notes

Quarter 1

Quarter 2

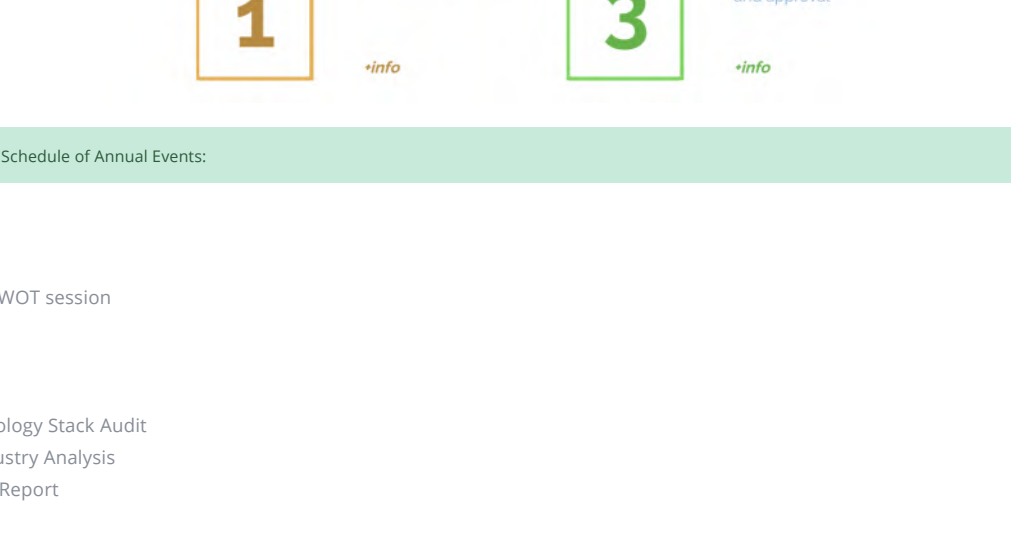
Quarter 3

Quarter 4

Annual Agenda

ANNUAL PLANNING PHASE

Augment your business plan with our annual alignment process



Suggested Schedule of Annual Events:

Week 1:

- Schedule SWOT session

Week 2:

- Run Technology Stack Audit
- Create Industry Analysis
- Build Final Report

Week 3:

- Deliver Report

Week 4:

- Build Budget

SWOT Meeting: 60 minute session with the following agenda

- 00: Segue
- 05: SWOT explanation
- 10: Strengths
- 20: Weaknesses
- 30: Opportunities
- 40: Threats (Try to avoid dwelling here)
- 50: Maturity Questionnaire (Just the Strategic Maturity)
- 55: Schedule next session (Report delivery)

Report Delivery: 90 minute session with following agenda

- 00: Segue
- 05: Report Handout
- 10: Executive Summary
 - SWOT Results
 - Industry Analysis Summary
 - Stack Audit Summary
- 60: Scope the key Projects in the IT Strategy
- 85: Next Steps

Executive Overview

Executive Summary

Audit Result Overview

HIT: STRATEGIC BUSINESS REVIEW Current State Future State

Tools

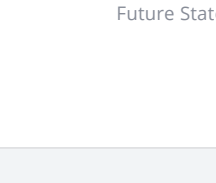
Annual Activities Checklist

ARCHITECTURE

Current State

Future State

Measuring the technical maturity of a client is a matter of ensuring that your technology is working for your business each year.



Technology Alignment

Current State

Future State

Statement **(Describe)** Current State Future State Recommendations

Has the Architecture been audited in the last 12 months.

Note

Comment

Tickets

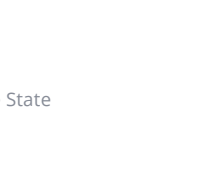
Add New Todo Item

SERVICE

Current State

Future State

There are many lines of business applications that empower your employees, whether it is your CRM or the office suite we have a series of processes that will ensure you have the right tools for the right job.



Service Audit

Current State

Future State

Statement **(Describe)** Current State Future State Recommendations

Have we audited the Service delivery in the last 12 months?

Note

Comment

Tickets

Add New Todo Item

RISK

Current State

Future State

With the growing threats facing the workplace each year it is important to understand what risks are facing your organization as well as how assess them for potential. Don't worry we have you covered!



Cyber Security

Current State

Future State

Statement **(Describe)** Current State Future State Recommendations

Has a NIST Overview audit been completed in the last 12 months?

Note

Comment

Tickets

Add New Todo Item

STRATEGY

Current State

Future State

Below is a series of annual maturity questions, select all that clearly apply to ((client.name)). This will be your base score through the year. Each section increases your maturity and must be in place before it can be checked off. NOTE: Add in services that pertain to your core Offerings as an MSP!



Annual Strategy

Current State

Future State

Statement **(Describe)** Current State Future State Recommendations

Have we completed an Annual Strategic Session?

Note

Comment

Tickets

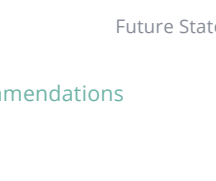
Add New Todo Item

QUARTERLY GOALS

Current State

Future State

Each quarter we work through a checklist of activities to ensure that your strategy is adapting to events.



Quarter 1

Current State

Future State

Statement **(Describe)** Current State Future State Recommendations

First Quarter QBR

Architecture Tasks Complete

Risk Tasks Complete

Service Tasks Complete

Note

Comment

Tickets

Add New Todo Item

Quarter 2

Current State

Future State

Statement **(Describe)** Current State Future State Recommendations

Second Quarter QBR

Architecture Tasks Complete

Risk Tasks Complete

Service Tasks Complete

Note

Comment

Tickets

Add New Todo Item

Quarter 3

Current State

Future State

Statement **(Describe)** Current State Future State Recommendations

Third Quarter QBR

Architecture Tasks Complete

Risk Tasks Complete

Service Tasks Complete

Note

Comment

Tickets

Add New Todo Item

Quarter 4

Current State

Future State

Statement **(Describe)** Current State Future State Recommendations

Fourth Quarter QBR

Architecture Tasks Complete

Risk Tasks Complete

Service Tasks Complete

Note

Comment

Tickets

Add New Todo Item

Current State

Future State

Learn Everything You Need to Use Managed Services Platform to Run World Class Client Review Meetings or QBRs

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