



Thanks!

Thanks for downloading the Smart Dolphins IT Self-Assessment Tool. We hope you find this valuable. We'd love to hear about your results and any feedback you might have on this process.

No Tech Talk!

Most businesses are dependent on their IT and it would seem success here is simply a matter of the right technology. More important than specific technology is the approach a company takes with how to support, manage and progress their technology. Accordingly, you'll see that this assessment tool isn't technical. Instead, you'll be thinking about how you and your IT team manage your technology.

How It Works

It's pretty simple. The assessment begins on the next page and is a collection of categories related to your IT. Each category has a set of opposing statements that are intended to give you a frame of reference; each statement illustrates what each of the spectrum looks like within the category. Using these statements as guideposts, you will rank your own organization on a scale of 1 to 5 in each category.

For example, if you feel your business more closely matches the statement on the left, you will probably want to give your business a 1 or 2. If you feel your reality is more like the statement on the right then give yourself a 4 or 5. Obviously, you might give yourself a 3 if you're in the middle or undecided.

When you're done scoring all the categories, add up your score across all categories. This total score will fall in one of the ranges described on the last page.

IT Team

Some of the statements refer to your IT team and this might not be clear; the makeup of this team is different in every organization. Your IT Team might be an outsourced company or contractor(s), or your team might be an internal employee(s).

Success!

Success requires action. Review some of your lowest scores on this assessment and make an action plan for improvements. Focus on just one or two areas at a time and set a timeline for completion. Rinse. Repeat.

If Technology is important to your company you'll want to have a process of regularly reviewing your IT maturity in the various areas we review in this assessment. Over time, you should see a steady increase in your assessment score as well as a corresponding increase in the results you enjoy from your IT. We hope you'll find this tool a critical part of your success.

Proactive Technology Leadership

Feel free to call on Smart Dolphins. If you need help with this assessment or would like to have a general discussion about your IT, give us a call. Of course, we help our customers score well on this assessment and could likely do the same for you. We'd be happy to share with you how we do this.

Your Assessment



CATEGORIES	1 STATEMENT	5 STATEMENT	SCORE
Clearly Defined IT Roles	There are no clearly defined roles for the individual members of your IT team. Everyone does everything.	IT roles are defined and individuals specialize in focused areas.	
Isolate Reactive IT Work	Everyone on your IT team is constantly distracted by the work required to fix day-to-day problems.	There is a dedicated person or sub-team that is responsible for all “fire-fighting” IT work. This allows the rest of the team to be dedicated and focused on the proactive IT work.	
IT Leadership	There is no leader of IT who understands your organization and how the technology impacts your business from a high level.	There is a clearly identified leader of IT who understands your business and the current state of your IT infrastructure.	
Regular IT Reviews	Reviews of the current state of the IT infrastructure only happen reactively and very irregularly and infrequently.	There are regularly and frequently scheduled reviews of the current state of your IT infrastructure with the executive team within your company.	
IT Plan	There is no IT plan beyond the work that needs to be done in the immediate future.	There is an IT plan that describes what needs to happen this year (and beyond, if appropriate).	
IT Budget	There is no IT budget. Money is spent as needs arise.	There is a firm IT budget for the year and rarely does actual expenditures differ from the budget.	
Strategic IT	There is no consideration given to how technology could be used strategically to improve your competitive position or efficiencies for your company.	Technology is frequently discussed at the highest levels of your company and is viewed as a source of potential competitive advantage and a way to be more productive.	
IT Standardization	There is very little hardware or software standardization across your company.	IT Standardization is a top priority and there is a definitive plan and consistent execution toward standardization across your organization	
		SUBTOTAL FOR THIS PAGE:	

Your Score

CATEGORIES	1 STATEMENT	5 STATEMENT	SCORE
Emerging Technologies	There is confusion and uncertainty about emerging technologies. These things may be discussed in general terms, but there is no specific strategy for incorporating emerging technologies into the business in the future.	There is a strong awareness around emerging technologies and where these things fit within future plans. For example, "The Cloud" is understood and there is agreement on its place in your organization today and in the future.	
IT Service Request Process	IT service requests are managed with very little structure and process.	IT Service Requests are documented in a system and strong processes are used to ensure work is completed and documented.	
IT Project Planning	IT Projects are approached with very little planning or process.	IT Projects are well planned before any actual work begins.	
Investment in IT Tools	Very little investment is made in IT tools and automation.	Heavy investment has been made in IT tools and automation.	
IT Documentation	IT documentation is sparse and usually out of date. There is no process in place to ensure IT documentation is accurate on an ongoing basis.	IT documentation is thorough, well-organized and up-to-date. Strong process ensures the quality of the IT documentation is maintained.	
IT Security	IT Security is largely ignored beyond the basics. There is no proactive review of the current state of the company's IT security.	IT Security is a high priority and a process exists to review the company's IT security regularly.	
Third Party Technology Liaison	The IT team only works with third party technology vendors when they must. Other non-technical people in the organization often get involved with these other vendors for ongoing support and for major changes.	The IT team is responsible for working with third party technology vendors on both an ongoing basis and when major changes are planned.	
Backup and Disaster Recovery	A simple backup system exists, but it is rarely, if ever, inspected and there is no plan to recover from an IT disaster.	A robust data backup exists and is inspected and tested as part of a regular process. There also exists a disaster recovery plan that is also reviewed and updated regularly.	
Contingency plan for turnover of key IT personnel	The business is dependent on one or two key IT Team Members and there is no contingency plan. The business is vulnerable to turnover in this role.	The business is not dependent on any single person in the IT role.	
SUBTOTAL FOR THIS PAGE:			
SUBTOTAL FROM PREVIOUS PAGE:			
TOTAL SCORE:			

Well Developed (77 or higher)

Well done! You have a tremendous asset here. Your business is well positioned to make technology and your IT infrastructure a competitive advantage for your organization.

Our only advice would be to ensure that you have a continuous cycle of review to make sure that your approach with IT remains strong. Well done!

Maturing (67-76)

Nice. You still have some things to work on, but you should rest easy at night.

Do know that “Good” is the enemy of “Great”. Examine your situation closely and consider the value of taking your IT to the next level. Often the missed opportunity has tremendous value and it can come from what might seem like minor flaws.

Inconsistent (57-66)

While you might feel your IT is “fine”, there are a lot of opportunities to take advantage of and there are likely risks that you can’t easily see.

If Technology is indeed important for your organization, you and your IT team would be best to put some time, energy and additional investment into how you approach your IT. Don’t ignore this. There is a lot at stake.

Fragile (47-56)

You have probably seen some signs of weakness (possibly for some time now), but you probably haven’t previously considered many of the categories that were reviewed in the assessment. There is a huge opportunity for improvements within your organization.

You should be putting IT on the company’s agenda as a top priority for your next planning cycle. You have a lot of work ahead of you and a lot to gain.

High Risk (below 47)

Yikes! This is not where you want to be. You likely knew this before conducting this assessment, but perhaps you weren’t sure on the severity of your situation. Either technology is not important to the success of your company (this is rare these days) or you need to make some dramatic changes.

There are likely some major holes that you can patch that will at least get you out of this High Risk category. Stop the bleeding and then step back and look for a major overhaul to your approach to IT.