

The 6-Step
IT Roadmap
for Mid-sized
Companies

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The 6-Step IT Roadmap for Midsized Companies

Is it time to make some serious headway when it comes to your IT department?

Tired of limping along with IT problems that never seem to go away?

Concerned that your competition is outpacing you with a technological advantage?

Well you've come to the right place. This is an IT roadmap that is easy-to-understand for COOs and CFOs who don't come from a technology background but find themselves responsible for the department.

You don't have to start your travels on the roadmap at #1, although that might make it easier. What's important is that you engage your IT team along the way. But don't get caught up in the technology. This roadmap is about efficiency and effectiveness and turning your IT department into a strategic contributor for your company.

Let's get started.





1

Implement a service ticketing system to get your team out of “email hell”

We take a deep dive into ticketing systems in our paper “The one tool that will streamline your IT department”. Check out www.ITMoneyPit.com if you haven’t already seen it. When your team manages requests for support via email, you’re more prone to see mistakes, inefficiencies, and miscommunications in the process.

A ticketing system creates efficiency when used properly and there are many good solutions out there to consider.

- If you have a CRM or ERP system, there maybe a ticketing system functionality as part of it. Otherwise, products like Zendesk or Zoho are available, or Spiceworks if you’re looking for a free version.
- Don’t eliminate email as an option for requesting support, but create a universal email address (such as helpdesk@yourcompany.com) for your entire department and then have those requests put into the system.
- Make use of the automated email features, documentation, and reporting options in the system. It will help you build consistency and a culture of accountability.



2

Clearly document process and response expectations

This is like a mini roadmap inside the IT roadmap. It outlines how you are going to manage requests and how your IT team should document their support and activities. A ticketing system helps with the documentation and a good guidance document can outline your team's expectations.

Create categories for request/ ticket priorities.

- Priority 1 might be something that effects the entire company or an entire department
- Priority 2 is an urgent request affecting only one person or a few people
- Priority 3 is a common day to day request such as problems connecting to a printer.

Create response time expectations for each ticket priority. For example,

- Priority 1 tickets should have a response time of 15 minutes
- Priority 2 tickets, 60 minutes
- Priority 3 tickets, one business day.

Remember, "response time" does not mean the request is resolved. It means it has been acknowledged by your team and they've started the process of resolving it.

Document the process for all of your standard, every-day procedures as well as the steps used to resolve and manage individual tickets. This is another case where the ticketing system can help tremendously. If someone on your IT team is away or leaves, you want to be able to bring someone else in who can pick up where they left off.



3

Create a team coordinator role

We aren't suggesting you hire anyone new, but we are suggesting you create an official role for someone already in the company. This could be a good role for a junior IT person or an administrator who has an understanding of IT. The role isn't to "coordinate" the team, rather the role is to keep things going.

This is one change that will really impact what your IT team focuses on each day. If the logistics are handled by a coordinator, the rest of the team can focus on solving problems. This often makes IT professionals happier and has a big impact on bottlenecks.

The role should include the following responsibilities:

- Respond to all requests/ tickets for IT support as soon as possible. This doesn't mean they resolve the issue, it just means they acknowledge it and let the person know that the ball is rolling.
- Prioritize all requests/ tickets so they are handled accordingly.
- Manage all communications to the IT help desk either via a universal phone number or email address.



4

Invest in the right automation tools

The right automation tools can be game-changers. They lead to big improvements in productivity, quality, and consistency when used correctly.

What kind of automation tools make sense for your company will depend on the size of your team and what tools you have in place already. Here are a few suggestions:

- For a larger team, consider a product like LabTech or Kaseya which creates opportunities for automating different processes, lets your IT team access computers remotely, and lets your team work on more than one machine at a time.
- Don't need something as big as LabTech or Kaseya, consider remote control tools which saves your IT personnel from physically being at a computer to troubleshoot it. This is especially important if you have more than one office or have employees who work remotely or travel extensively.
- Put maintenance on "cruise control". While things like patch and antivirus updates might not seem exciting, they're important, can be frequent, and really should be done quickly and automatically to avoid any compatibility or security concerns.



5

Be clear about your IT team's role

More and more companies are setting the bar higher for their IT team. They want a contribution on a strategic level instead of just trouble-shooting and putting out fires. And few, if any, companies make any significant progress on IT if they hire someone to be a jack-of-all-trades.

When considering the priority of your IT team, keep these things in mind:

- Most IT professionals at mid-sized companies will tell you that they're overloaded and probably can't see the light at the end of the tunnel. It's hard to keep really good employees around in those circumstances. Plus, a "keeping the lights on" approach to IT isn't a sustainable approach to your IT budget.
- More companies want IT to be strategic and help improve the bottom line. Some of the most in-demand IT roles are for project managers, business and data analysts, and security professionals. These roles aren't trouble shooting day-to-day problems, they're tackling bigger picture projects and initiatives.
- There is growing adoption of automation technology and managed IT or co-managed IT support services. Both facilitate the transition into a strategic role for your IT by taking care of the routine tasks.



6

Explore Managed IT or Co-Managed IT options

If you're looking at this roadmap, you're likely struggling with an IT person or IT department which isn't getting you what you want. Many mid-sized businesses are in the same boat, and it can significantly impact their business. If expanding your IT team isn't a viable, or cost-effective option, a Managed IT or Co-Managed IT scenario might be.

- Managed or Co-Managed IT supports day to day and routine activities so you can focus on other IT priorities. This also gives you access to a larger team who can correct some of those persistent problems and get you out of a break-fix loop.
- Bringing a partner in to help manage your IT can create some significant monthly savings over hiring additional support staff. For example, network administrator in the Chicago area can range from between \$68,500 and \$102,000 per year. Depending on the number of employees, Managed or Co-Managed IT support can cost between \$36,000 - \$72,000 with more support and expertise. Credible service providers will agree to services for a fixed monthly fee.
- You can define the level of support you want with most IT service providers. Most will offer you some combination of computer and server support, remote network monitoring, data backup and disaster recovery, custom software solutions, and technology evaluation and planning. How you structure your agreement should be based on the skills and expertise of your IT staff and what areas they most need support with.



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