



The goal of this eBook is to guide your company through the steps necessary to fully understand your IT infrastructure needs now and in the future, and efficiently vet IT services and vendors to meet those needs.

## OUTLINE

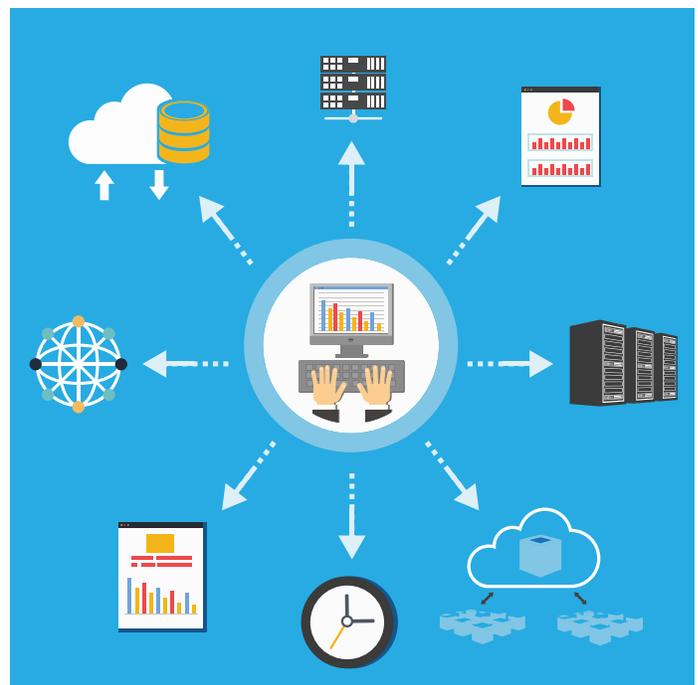
1. Introduction
2. The Process
3. Business Assessment
4. Application Assessment
5. Infrastructure Assessment
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# 1. INTRODUCTION

## Understanding Your IT Infrastructure Needs

The rapid pace of innovation and ease of scalability present today's businesses with historic levels of challenge and opportunity. In order to remain relevant to your clients and customers in the modern marketplace, companies must be agile and embrace change. IT groups are under pressure to keep pace with these constantly shifting business needs and deliver new technologies faster.

The focus for many IT departments has moved to delivering overall strategy, innovation, and value in an efficient and effective manner. This e-book will enable the IT buyer to thoroughly understand the different components of their business and guide them through the process of procuring complex infrastructure services. The purchasing strategies presented will help procure IT services that best fit current and future business needs, at the lowest price, with the least amount of risk.



## 2. THE PROCESS

Going through this process is essential to your success



## 3. BUSINESS ASSESSMENT

**The business assessment is the first step in the buying process. This is a basic assessment of your company's initiatives, goals, and growth plans for the next 1-5 years.**

### **What are the company-wide initiatives over the next 1-5 years?**

Taking your company-wide goals into consideration is important as your IT infrastructure needs to support the achievement of these goals. If your company is looking to improve its market position, it is likely your infrastructure will need to be improved as well.

### **What are the departmental goals?**

Your departmental goals need to support your company's initiatives. Be realistic with your goal setting. More than ever, the IT department needs to be seen as a solution center for all other departments desiring to improve results.

### **Is your company expanding into new markets or business segments?**

If your company has plans for growth into new markets or business segments, you can get in trouble fast if you don't have the infrastructure in place to support that growth. Consider what technology changes will need to happen to meet your business goals. Does this financially make sense for your company?

Take into consideration any tax benefits of doing business in certain states or countries when deciding where to set up offices, or rent data center space. Connectivity in certain areas can be very expensive, be aware of low benchmark pricing in that area before signing a long-term lease.

## 3. BUSINESS ASSESSMENT

### **Are there any acquisitions planned over the next 2-3 years?**

When acquiring other companies, you can end up with legacy equipment, antiquated systems and ineffective IT services – do your due diligence when researching other companies. Take their systems into consideration when purchasing new IT services to ensure you are using the most effective technology for each aspect of the business.

### **Will there be any new products introduced over the next 2-3 years?**

New products for end-users often lead to the need for an infrastructure upgrade. Make sure you work with all involved departments to fully understand the business needs. This will help you to determine the best solution at the most cost effective price to maximize added revenue.

### **What purchasing model is better for your company at this point in time - Capex or Opex?**

Traditionally, technology investments were most often preferred as a capital expense to take advantage of amortization and depreciation of those investments over time. There's a growing argument that operating expenses have distinct advantages over the traditional way of purchasing, especially when you take into consideration the rapid advances in technology, less predictable IT needs, and the pay-per-use model. Depending on the cycle of your company, the Opex model may not make sense at this time. The bottom line is always the focal point of any company; weigh your options and do what makes sense for your company's financial focus.



## 4. APPLICATION ASSESSMENT

**This phase looks at your current infrastructure, and applications to determine if there are gaps to address, and ensure future growth is taken into consideration.**

**Are there reasons to move specific applications or data sets to the cloud?**

Having the flexibility to provision on-demand can help to save money and increase time to market for particular applications and locations.

**Who are your end users and what are their needs moving forward?**

**Are you able to support any device, at any time?**

It's important to stay ahead of the curve when it comes to meeting the needs of your end users. Competition is fierce, you don't want to lose market share to tech savvy competitors.

**Is your current IT infrastructure able to support the growth pattern of your company?**

If your company is growing at a steady pace, you need to plan accordingly. There are too many companies that get stuck in an overpriced, outdated solution that no longer fits their needs.

## 4. APPLICATION ASSESSMENT

### **Are you planning on doing a hardware refresh in the next 1-3 years?**

The life-cycle of your equipment needs to be part of your TCO analysis when looking at what solution makes the most financial sense for your company.

### **Do you have any legacy applications that need to stay on hardware? Do you have any “bursty” applications?**

Take into consideration what the most cost effective platform is for each application. You could end up consuming a lot of resources trying to “force” applications into a solution that ultimately doesn’t work.



## 5. INFRASTRUCTURE ASSESSMENT

### **Do you have any compliance concerns?**

Make sure you do your due diligence when engaging with vendors. Have a risk analysis checklist for all vendors to complete so you fully understand what security controls they are responsible for, and which you are responsible for.

### **Do you have a tested DR plan in place?**

You need to decide how important down time is to your company. It's one thing to say you have a DR plan and another to know that your plan works effectively when it's really needed.

### **How much of your infrastructure do you feel comfortable managing internally?**

It's increasingly more expensive to hire the best engineering resources needed for developing and implementing key strategies. Using managed services from a vendor is becoming a norm for SMBs and for corporate giants. Consider the most cost-effective way to get the most bang for your buck with your resources.

### **Do you need all locations to talk to each other?**

#### **How is each location getting access to the Internet**

Keep this in mind as you scale your network, solutions can get costly as your company grows or expands to new regions.

### **Do you plan on opening or acquiring offices in remote locations?**

Do an initial discovery exercise to get an estimate of your connectivity costs before signing the lease for new office space. Your Internet solution can become very costly if construction is required, which could make that inexpensive building lease much less optimal.

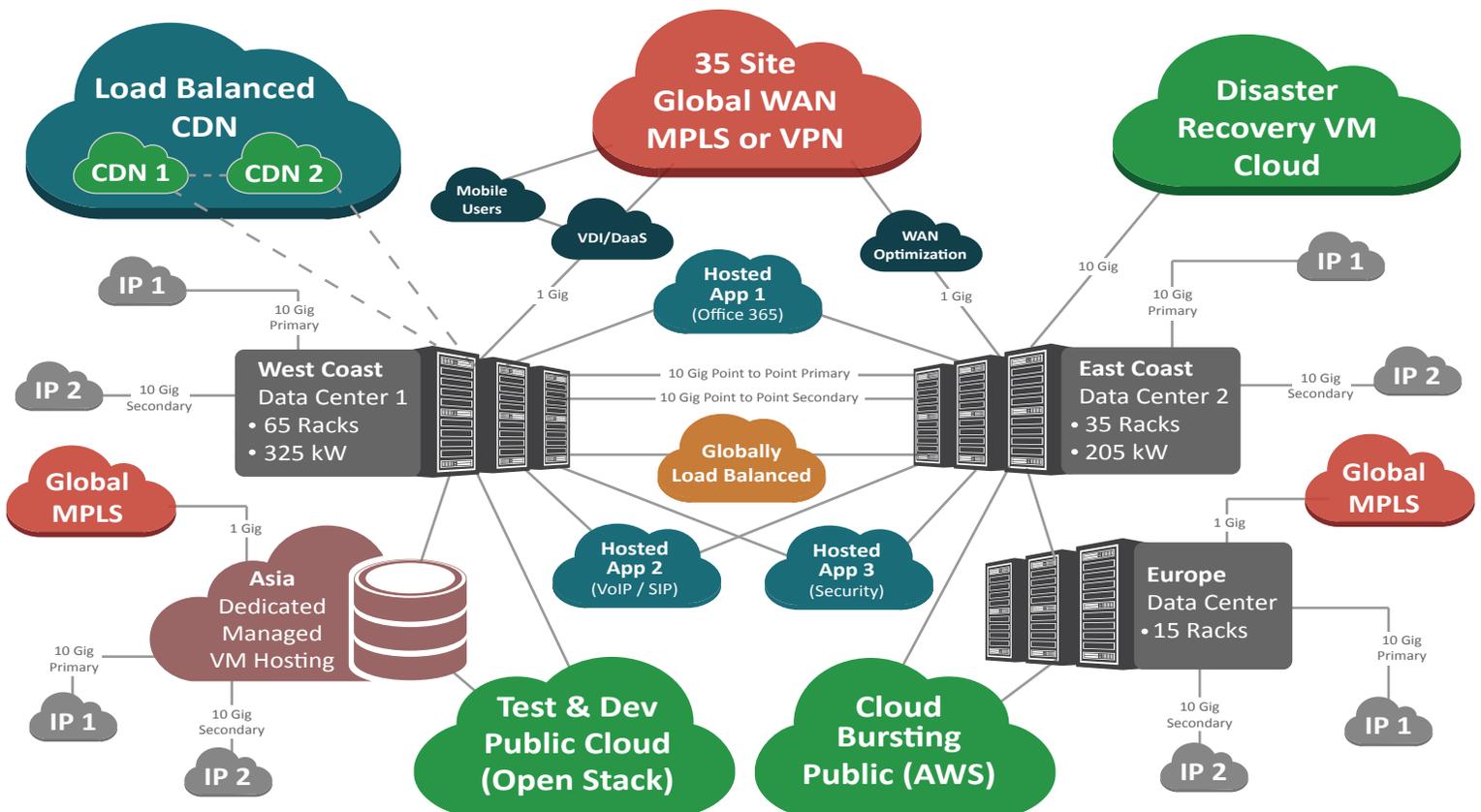
# 5. INFRASTRUCTURE ASSESSMENT

**How are you managing security and network firewalls?**  
**Are your applications latency dependent?**

Consider the most effective design/delivery method for your network and security services. While you may normally purchase hardware, it may be more cost-efficient to let a vendor manage your network and security traffic.

**Do you know when your existing contracts expire and if they have an auto-renew clause?**

It can be challenging to keep track of your contracts, especially as you grow, add new services and locations. The last thing you want to do is to get stuck in a contract for services that no longer meet your business needs.



## 6. PLAN/EVALUATE THE OPTIONS

**After completing your assessments, you are ready to go to market. Below are basic considerations for your RFP process.**

### **Are you knowledgeable of the low-price benchmarks for specific product/service sets in each geographic area?**

Knowing the low price benchmark for desired services and geographic locations will help you to develop a more realistic budget and action plan.

### **What are all the factors that come into play when calculating the TCO for your solution?**

The goal shouldn't be to get the cheapest solution, but rather the best solution at the lowest price. It's about making smart decisions based on your strategic goals, daily operational costs, direct and indirect costs – hardware, software, systems management, support and services.

### **Are you familiar with who the best vendors are in each market?**

Knowing the “sweet spots” of each vendor makes the vetting process much easier and quicker, and ensures you are getting the best of the best in that particular space. Everyone knows the 800 lb. gorilla in the space, but often it's the less known vendors that provide the best customer support and offer services using the latest technology which lead to higher optimization of your solution and lower prices.

### **Do you have the time and resources to negotiate for the best pricing and contract terms with each vendor?**

Time is money. Know how to quickly get to a win/win solution for all parties when negotiating SLAs and contract terms.

## 7. DEPLOY/EXECUTE

**A well thought-out plan of execution will ensure a smooth transition and reduce implementation headaches.**

- Get buy-in from your team and set time-lines
- Execute connectivity, data center, and cloud service contracts
- Order needed hardware/software
- Coordinate a migration schedule with your vendors and internal team
- Test and test again

### **5 steps to a new technology implementation:**

1. **Set SMART goals** - Determine the most critical steps, what action to take during each step, the rationale for each step and a method for determining that the step has been successfully implemented.
2. **Establish milestones and deploy in phases** - The successful completion of each stage represents a milestone. Deploying in stages can ease the transition, and allow you to tweak issues on a small scale.
3. **Train employees on the new technology** - If your employees don't understand how to use the technology in a manner that benefits them, this will derail the success of deployment. Prepare them for any challenges and focus the training on how it will benefit them.
4. **Provide ongoing support** - Nothing is unbreakable – talk about new challenges, troubleshooting tactics, and additional training needed.
5. **Be willing to bring in a technology partner if needed** - No matter how well you plan the implementation of a new technology you may need to bring in a trusted partner to help. There are times it makes sense to utilize an outside expert to help with planning, or training. Do your research ahead of time.

## 8. DRIVERS OF COMPLEXITY

**The more complex your infrastructure, the more time and resources you will need to invest to thoroughly vet the marketplace and ensure you are getting the right solution at the best price, terms and lowest risk.**

### **Number of locations**

The more locations you have, the more likely it is that you have several vendors that you outsource IT services to. Managing all of these people, contracts, and services is time consuming. Knowing the low price benchmark for potential desired services and geographic locations will help you to develop a more realistic budget and action plan.

### **Number of vendors**

As your company grows, the number of vendors you have to manage grows with it. Unfortunately, your IT staff doesn't always reflect this growth.

### **International Sites**

If your company has international locations, it makes the management of your IT infrastructure even more complicated. Lack of knowledge of the local tax laws, best vendors in that market, and not having IT support personnel in that area to assist are problems to address.

### **Number of applications that need to be supported**

As your applications grow, the solution needed to support those applications gets more complex. You may need a hybrid/customized solution to effectively and efficiently manage all of your systems and applications.

## 8. DRIVERS OF COMPLEXITY

### Compliance requirements

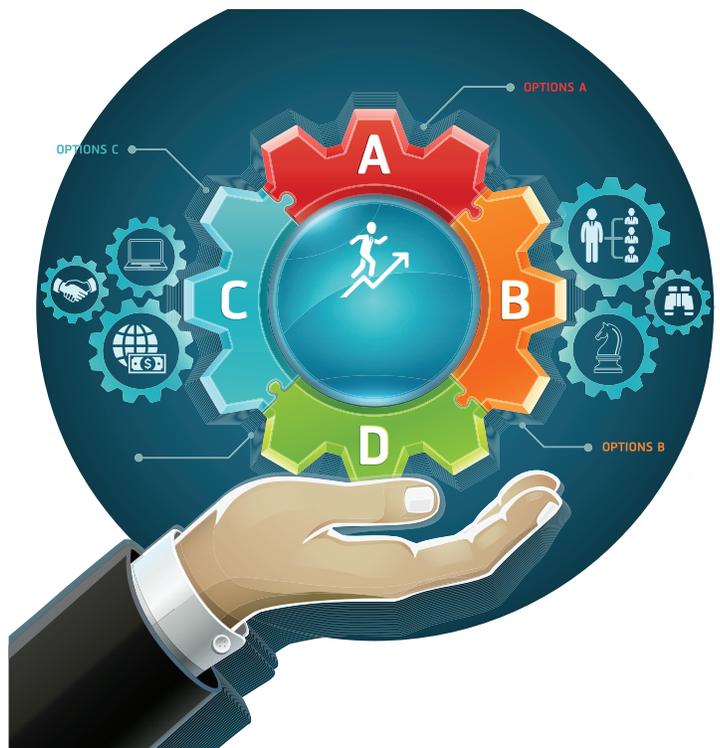
The amount of data you need to manage keeps growing, compliance regulations are always changing or being updated. You need to know if your data is secure, what your vendors are doing to prevent breaches, and where their responsibility ends and yours starts.

### Application resiliency and performance

It is important to evaluate the financial impact and risk of reputation damage of application downtime. Set an appropriate recovery time objective (RTO) for each application. Then determine the best service delivery method (cloud or colo) as well as the cost for each.

### Customer contractual obligations

Most MSAs and SLAs are written to the advantage of the service provider. It's important to know what to look out for when redlining contracts. The more vendors you work with the more daunting this task can be.

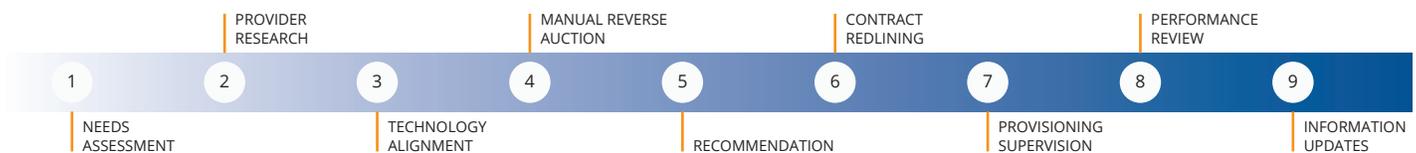


## 9. WHY USE A BROKER

As an IT Executive, it's your responsibility fully understand your company's initiatives, budget, current and future infrastructure needs in order to make smart buying decisions. Many organizations are building their business process around the capabilities of their technology platform which needs to be flexible, efficient and ever evolving. The worst thing you could do is to get trapped into an expensive solution that doesn't meet the needs of your end users.

Outsourcing IT infrastructure is a complex process – using a broker, such as StrataCore, to source, negotiate, and manage IT services saves you valuable time, and efficiently select the best providers, at the best price, under the best terms. StrataCore works as your advocate to get better vendors, better results, and save you time and money.

### HOW IT WORKS



A StrataCore expert will vet the market on your behalf to find the best fit for your requirements. We have access to market trends and current low price benchmarks for all services, domestic and international. Our experts assist with pricing and contract negotiations to ensure you get the most favorable terms available for the lowest price.

The best part for our clients, we do all of this at no cost to you. We are paid on a residual basis by the vendor of your choice.

# 10. INFRASTRUCTURE QUIZ

**Answer the following infrastructure questions:**

**1. Number of locations**

- a. 1
- b. 2-5
- c. 6-10
- d. 10+

**4. Number of applications supported**

- a. 1-5
- b. 6-10
- c. 11-20
- d. 20+

**2. Number of service providers**

- a. 1
- b. 2-5
- c. 6-10
- d. 10+

**5. Compliance requirements**

- a. None
- b. SSAE 16/ISO 27001
- c. PCI/HIPPA
- d. Fed Ramp/FISMA

**3. Number of international locations**

- a. 0
- b. 1-2
- c. 3-10
- d. 10+

**6. Total monthly spend IT Infrastructure services (all locations)**

- a. \$0-5,000
- b. \$5,000 -25,000
- c. \$25,000 -100,000
- d. \$100,000 +

**Calculate Assessment Total**

**a = 0 points, b = 1 point, c = 2 points, d = 3 points**

**0 - 2 points:** fairly simple IT infrastructure

**3 - 6 points:** multiple sites, vendors and applications - a broker can assist

**7 - 12 points:** complex infrastructure requirements - broker assistance will be helpful

**13 + points:** global and/or nationwide deployments with complicated application and compliance requirements – a knowledgeable broker should be a part of your procurement strategy